Oracle® Fusion Cloud EPM

Working with Oracle Smart View for Office (Mac and Browser)

F14412-57

Oracle Fusion Cloud EPM Working with Oracle Smart View for Office (Mac and Browser),

F14412-57

Primary Author: EPM Information Development Team

Contents

8 Data Forms

9 Ad Hoc Analysis

10 Books

11 Reports

12 Dashboards

13 Planning Approvals

14 Task Lists

15 General Operations

16 Functions

17 Free-Form Mode

A Finding Information

Documentation Accessibility

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

Access to Oracle Support

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

Documentation Feedback

To provide feedback on this documentation, click the feedback button at the bottom of the page in any Oracle Help Center topic. You can also send email to epmdoc_ww@oracle.com.

1

Creating and Running an EPM Center of Excellence

A best practice for EPM is to create a CoE (Center of Excellence).

An **EPM CoE** is a unified effort to ensure adoption and best practices. It drives transformation in business processes related to performance management and the use of technology-enabled solutions.

Cloud adoption can empower your organization to improve business agility and promote innovative solutions. An EPM CoE oversees your cloud initiative, and it can help protect and maintain your investment and promote effective use.

The EPM CoE team:

- Ensures cloud adoption, helping your organization get the most out of your Oracle Fusion Cloud EPM investment
- Serves as a steering committee for best practices
- Leads EPM-related change management initiatives and drives transformation

All customers can benefit from an EPM CoE, including customers who have already implemented EPM.

How Do I Get Started?

Click to get best practices, guidance, and strategies for your own EPM CoE: Introduction to EPM Center of Excellence.

Learn More

- Watch the Cloud Customer Connect webinar: Creating and Running a Center of Excellence (CoE) for Cloud EPM
- Watch the videos: Overview: EPM Center of Excellence and Creating a Center of Excellence.
- See the business benefits and value proposition of an EPM CoE in *Creating and Running an EPM Center of Excellence*.

2

Welcome to *Working with Oracle Smart View for Office (Mac and Browser)*

This guide explains Oracle Smart View for Office (Mac and Browser) features and options including concepts, processes, and examples.

Where to find Smart View (Mac and Browser) documentation

The Smart View (Mac and Browser) documentation is available on the Oracle Help Center on the Oracle Cloud Enterprise Performance Management (EPM) page in the Books tab for your Oracle Fusion Cloud Enterprise Performance Management business process.

- To read this guide online in a browser, click the guide name link.
- To download a PDF file of this guide, click the PDF icon

  next to the guide name. You can also download it from the online version by clicking

  in the left panel next to the Table of Contents.

How to find information in this guide

To find information:

- From the online help, in the left panel of the browser window, use the Table of Contents to navigate to topics, or click the Search icon and enter a search term in the text box.
- From the PDF, navigate to topics from the table of contents, or use your reader's search functionality.
- See the Finding Information section in this guide's appendix for information on accessibility and troubleshooting resources.

About this guide

This guide covers features and tasks related to multiple data sources that are supported in Smart View (Mac and Browser). It may happen that some topics apply to all data sources and some apply only to specific data sources. The following document conventions are used to indicate the applicability of a topic to a data source.

- If a topic is applicable to a specific data provider only, then the provider name is mentioned at the start of the topic in the **Applies to:** section. For example:
  - If a topic is applicable only for Planning: **Applies to:** Planning
  - If a topic is applicable only for Essbase: **Applies to:** Oracle Essbase
  - If a topic is applicable only for Cloud EPM data sources, and not for Essbase: **Applies to:** Cloud EPM data source providers
- If a topic applies to all supported data providers listed in the Supported Data Source Providers topic, then the **Applies to:** section is not added to the topic.

3

Introduction to Smart View (Mac and Browser)

Related Topics

- Overview of Smart View (Mac and Browser)
  Smart View (Mac and Browser) provides an interface between Oracle's Oracle Fusion Cloud Enterprise Performance Management solutions, Oracle Essbase and Microsoft Office 365 deployed in a web browser on either Windows or Mac systems.
- Supported Data Source Providers
  Smart View (Mac and Browser) currently supports these data source providers.
- Smart View (Mac and Browser) Components
  Learn about the basic components of Oracle Smart View for Office (Mac and Browser), such as ribbons, panels, and menus that help you navigate and perform various tasks.
- Deploying Smart View (Mac and Browser)
  Administrators need to deploy Smart View (Mac and Browser) to their Office 365 users.
- Access to Smart View Functionality
- Localization in Smart View (Mac and Browser)
  Oracle Smart View for Office (Mac and Browser) supports localized versions of the user interface.

Overview of Smart View (Mac and Browser)

Smart View (Mac and Browser) provides an interface between Oracle's Oracle Fusion Cloud Enterprise Performance Management solutions, Oracle Essbase and Microsoft Office 365 deployed in a web browser on either Windows or Mac systems.

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

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

Other benefits of Smart View (Mac and Browser) 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

Supported Features

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

- Ad hoc analysis operations such as: Zoom, Pivot, Keep/Remove Only, Submit, Range Operations, Analyze/Free Form, and Formula Preservation
- Multiple-grid ad hoc worksheets
- 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
- Save ad hoc grids as forms, including save formatting
- Save ad hoc grids as Smart Forms, including save formatting
- Spreading, Grid Spread, Cell Locking, and Mass Allocation
- Functions: Includes a Function Builder interface and supports manual use of: HsGetValue, HsSetValue, HsAlias, HsGetSheetInfo
- Task lists
- Dashboards
- Flex forms
- Full 508 accessibility support
- Application building and maintenance for administrators
- Non-English environment or platform

Unsupported Features

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

- Copy and paste data points
- Double-click on member or data cells is not supported. Instead, use ribbon commands to accomplish tasks, such as zoom-in.
- Open forms and ad hoc grids from web applications (web launch)
- Native mode for ad hoc operations: Oracle Smart View for Office (Mac and Browser) does not support Native mode for ad hoc operations in supported Cloud EPM applications. Native mode is being phased out in favor of Standard mode, which offers enhanced features and is recommended for all users. To utilize Smart View (Mac and Browser) effectively, Oracle advises you to configure your Cloud EPM applications to use the **Standard** mode option for the **Smart View Ad Hoc Behavior** setting. This ensures compatibility and access to the latest functionalities.
- Query Designer
- Word and PowerPoint functionality
- Composite forms (no future plans for support)

- VBA

Videos

Your Goal	Watch This Video
Learn about using basic features in Smart View (Mac and Browser)	 Introducing Smart View for Office Mac and Browser

Supported Data Source Providers

Smart View (Mac and Browser) currently supports these data source providers.

Cloud EPM

The following business processes of Oracle Fusion Cloud Enterprise Performance Management are supported:

- Enterprise Profitability and Cost Management
- Financial Consolidation and Close
- FreeForm
- Planning
- Planning Modules
- Tax Reporting

Depending on the Cloud EPM business process you are connected to, Smart View (Mac and Browser) works with these extensions:

- Admin Extension
- EPM Books

Oracle Essbase

Smart View (Mac and Browser) supports analyzing data from Oracle Essbase (Essbase on Oracle Cloud Infrastructure via Marketplace) release 21.5.2.0.1 and later.

Smart View (Mac and Browser) Components

Learn about the basic components of Oracle Smart View for Office (Mac and Browser), such as ribbons, panels, and menus that help you navigate and perform various tasks.

Smart View Ribbon

The Smart View ribbon contains commands for all Smart View operations, such as Refresh or Submit Data, or launching the Options panel. The Smart View ribbon is always present. Note that in your Smart View setup, you may see a different name for this ribbon. Commands applicable to all contexts, such as the Home button or the Options button, remain enabled in any context; for example, the common command buttons remain enabled in an ad hoc sheet or in a sheet containing a form.

If you connect to multiple data sources for placing multiple grids in the same workbook, a separate Smart View ribbon is displayed for each connection. For example, if you are connected to Planning and Tax Reporting in the same workbook, you may see two Smart View

ribbons, say *Smart View Planning* and *Smart View Tax Reporting*, based on the naming set by your service administrator for easy identification.

Provider and Provider Ad Hoc Ribbons

When you open a form from a business process or data provider, the respective provider ribbon appears next to the Smart View ribbon. Each provider ribbon displays only the commands that are supported for the specific provider and mode. For example, when you access a Planning form, the Planning ribbon is displayed, and when you perform ad hoc analysis, the Planning Ad Hoc ribbon is displayed.

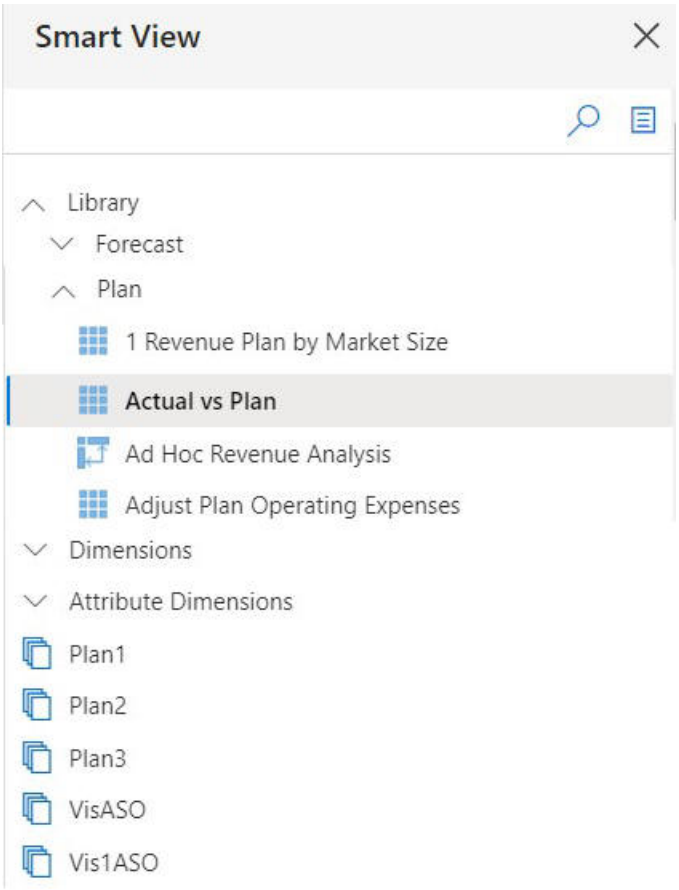
The provider ribbons include the following:

- Planning
- Planning Ad Hoc
- FCCS (Financial Consolidation and Close)
- FCCS Ad Hoc
- TRCS (Tax Reporting)
- TRCS Ad Hoc
- EPCM (Enterprise Profitability and Cost Management)
- EPCM Ad Hoc
- Essbase

Based on the extensions configured by your administrator, you can also see the Admin Extension ribbon and the EPM Books ribbon.

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.

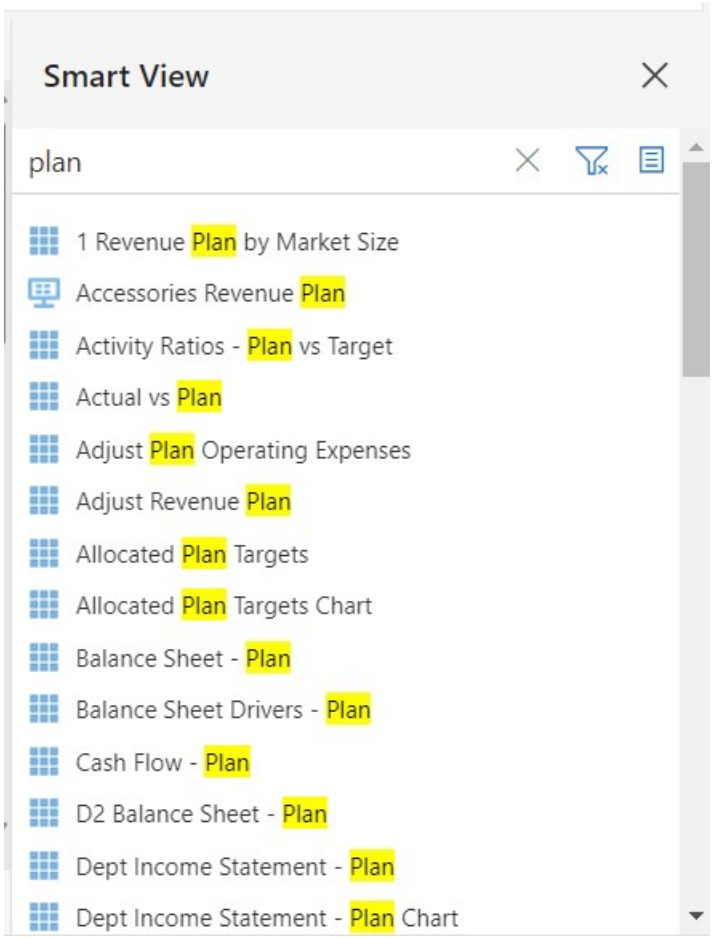


From the Smart View Home panel, you can:

- Get a tree view of forms and ad hoc grids present in the library, and cubes present in your data source.
- Search for forms, grids, and task lists.
- Select forms and ad hoc grids without opening them by clicking their icon or the area next to their names.
- Open forms and ad hoc grids by clicking their names.
- Open a form directly in ad hoc analysis mode by selecting it, right-clicking the form name, and then selecting **Ad Hoc Analysis**.
- Open an ad hoc grid directly as a form by selecting it, right-clicking the ad hoc grid name, and then selecting **Open Form**.
- Launch various actions and processes from the **Actions** menu. You can also select a form or ad hoc grid and right-click on its name to access these actions.
- **Service Administrators:** View and manage dimensions and attribute dimensions. See Using Smart View to Import and Edit Application Metadata in *Administering Planning*.

Search Box

The search box, located on the top in the Smart View Home panel, helps you find and access forms, ad hoc grids, and task lists faster. As you start typing in the search box, the list of items in the Home panel gets filtered to show the names with the highlighted search term. For example, if you search for "plan", then only the items with the letters "plan" in their names are displayed in the Home panel.



The search box supports case-insensitive search: For example, searching for "plan", "Plan", or "PLAN" fetches the same list of items which have this term in their names, irrespective of their case.

After typing the term, click

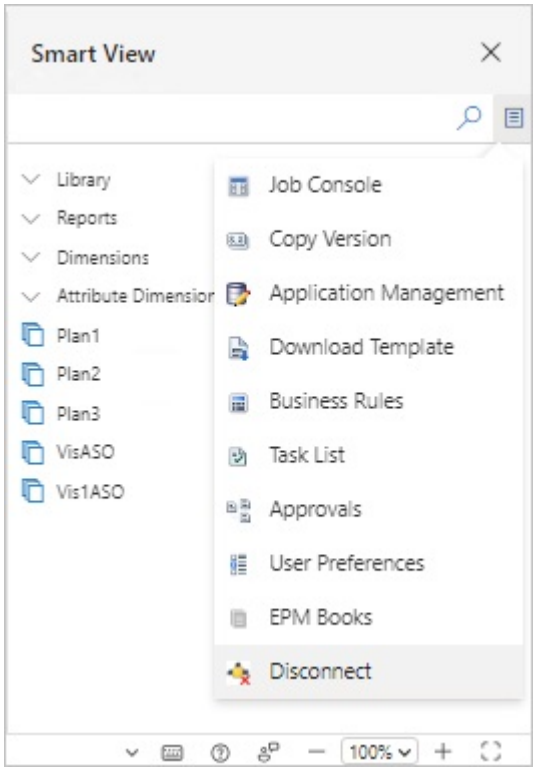
. The matching items from all the folders in the tree view are displayed in the search results in the Home panel. You can click an item's name to open it directly from the search results. You can also select and right-click an item in the search results to view more actions.

If there are no matching items for the searched term, the panel appears blank. You can clear the search box by clicking the Close icon.

Actions Menu

The Actions menu is located in the Smart View Home panel and is launched by clicking

.



This menu gives you access to various options such as:

- Job Console
- Business Rules
- Task List
- User Preferences
- Copy Version
- Approvals
- EPM Books (if the extension is enabled)

Service Administrators: The Application Management and Download Template options are available for Service Administrators in the Actions menu, if the EPM Admin extension is enabled. See Using Smart View to Manage Applications in *Administering Planning*.

Other Panels

Some task panels can overlay the Smart View Home panel, including:

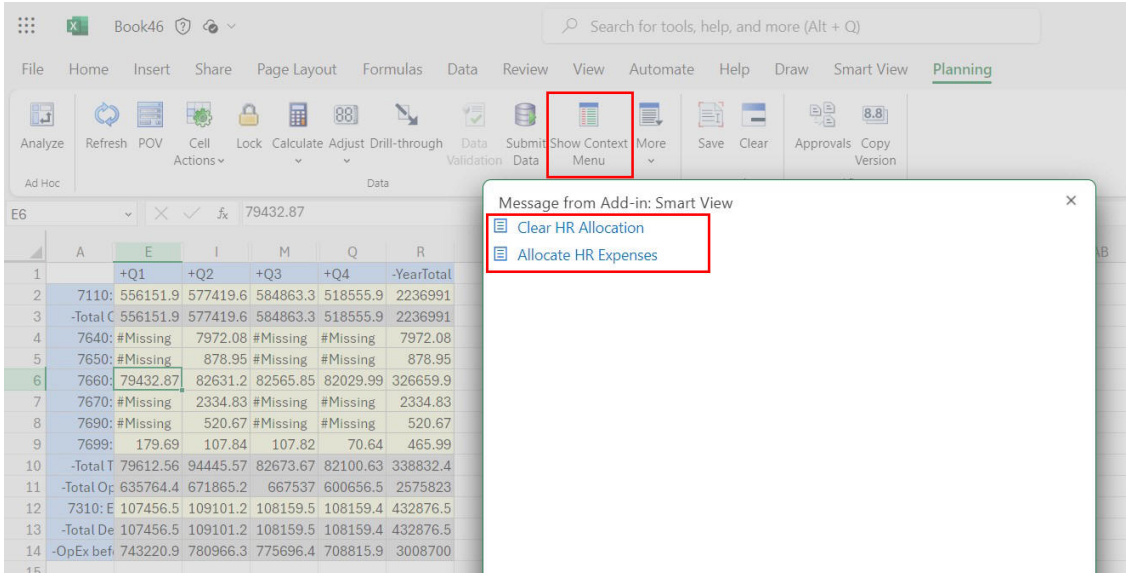
- Options panel: View and define Smart View options, after clicking the Options button in the Smart View ribbon (see Setting Smart View Options)
- POV panel: Set the Point of View, after clicking the POV button in the Smart View ribbon (see Selecting Members from a Point of View Dimension)
- Cascade panel: Cascade reports, after clicking the Cascade button in the Smart View ribbon (see Cascading Reports)

For each task panel that you open, a tab appears at the side of the panel. You can switch between panels by clicking the tabs as you require.

Context Menus

In forms, you access context menus by selecting a member or data cell in the sheet, and then clicking the Context Menu button on the provider ribbon. The items available on the context menu can vary depending on the selected member or data cell. The available options are determined by your Service Administrators and form designers, and can consist of business rules or any action menu items that are defined for currently-opened form.

Service Administrators: The commands that display on the context menu depend on the Action menus defined in the web application and applied to the form. See Administering Action Menus in *Administering Planning*.

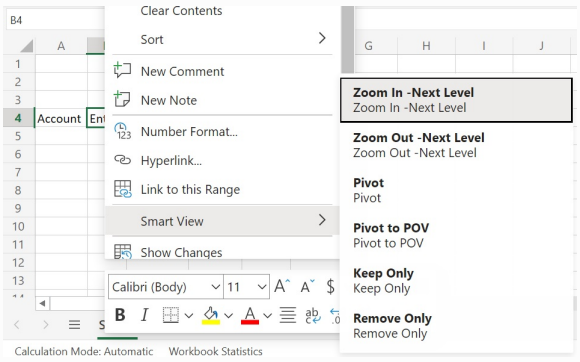


Right-Click Context Menu

The right-click context menu is a convenient way to access frequently-used menu items within the context of the selected cell. The items available in the right-click context menu can vary depending on the options selected by your Service Administrator while creating the manifest file. Service Administrators can add or remove menus by editing the manifest file and redeploying or sideloading again.

Note

The menu option name is repeated in the context menu; for example:



Service Administrators: The commands that display on the right-click context menu depend on selections you make in the **Select Items to Context Menu** dialog when creating the manifest file. See *Deploying and Administering Oracle Smart View for Office (Mac and Browser)* for information:

- Creating the Manifest File
- Deploying the Manifest File to Office 365 Users

Deploying Smart View (Mac and Browser)

Administrators need to deploy Smart View (Mac and Browser) to their Office 365 users.

Smart View (Mac and Browser) is hosted in the Oracle Fusion Cloud Enterprise Performance Management and Oracle Essbase environments.

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

Access to Smart View Functionality

Access to Smart View functionality depends on the access that Service Administrators set up for users in the business process.

Service Administrators: For more information, see Administering Access Control.

Localization in Smart View (Mac and Browser)

Oracle Smart View for Office (Mac and Browser) supports localized versions of the user interface.

The localized versions of Smart View (Mac and Browser) provide you with an improved non-English experience where you can switch to your desired language to work with the Smart View (Mac and Browser) user interface, as required.

Supported languages are: Arabic, Chinese (Simplified and Traditional), Czech, Danish, Dutch, English, Finnish, French, French Canadian, German, Greek, Hebrew, Hungarian, Italian,

Japanese, Korean, Norwegian, Polish, Portuguese, Portuguese (Brazilian), Romanian, Russian, Slovak, Spanish, Swedish, Thai, and Turkish.

On the Mac, you change the locale of your Mac system to use a localized version of Smart View (Mac and Browser). On the Chrome browser, you change the language preference of Office 365. You can change languages to any supported language at any time. For example, a user may change from English to French, and then later, change from French to Simplified Chinese. There is no limit on changing the interface language.

To use a localized version of Smart View (Mac and Browser):

- On a Mac, change the language version of your Mac system. See Change the language your Mac uses for instructions.

  When you change the language on your Mac system, the change is instant.

- On Windows, change the language display preference in the browser version of Office 365. See Change your display language and time zone in Microsoft 365 for Business for instructions.

  When you change the language in Office 365 on Windows, allow at least 20 minutes for the change to take effect.

4

Connecting to Data Sources

Related Topics

- Connecting to Data Sources on the Mac
  Complete the procedure in this topic to log in to Office 365, your cloud service, and Smart View (Mac and Browser) on the Mac.
- Connecting to Data Sources in Chrome
  Complete the procedure in this topic to log in to Office 365, your cloud service, and Smart View (Mac and Browser) using Chrome.
- Disconnecting from Data Sources
  Use the **Disconnect** command in the **Actions** menu or right-click menu to disconnect from a connected data source on a sheet.

Connecting to Data Sources on the Mac

Complete the procedure in this topic to log in to Office 365, your cloud service, and Smart View (Mac and Browser) 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.

> **Note**
>
> - Starting in 21.09, an "Update is available" message is displayed when starting Oracle Smart View for Office (Mac and Browser). A new or updated manifest file is required to use the update. End users can ignore the message and continue using Smart View. Administrators can click on **Get update**, which will take them to the **Create Manifest File** page where they can create a new manifest file or update the existing one and deploy it to users.
> - To resolve any login issues after a monthly provider update or deployment of a new or modified manifest file, try clearing the Office and Web cache for Excel. See Clearing the Office and Web Cache on a Mac in *Deploying and Administering Oracle Smart View for Office (Mac and Browser)*.

Connecting to Data Sources in Chrome

Complete the procedure in this topic to log in to Office 365, your cloud service, and Smart View (Mac and Browser) using Chrome.

1. In Chrome, log in to the web application.

   For example, launch Planning and log in.

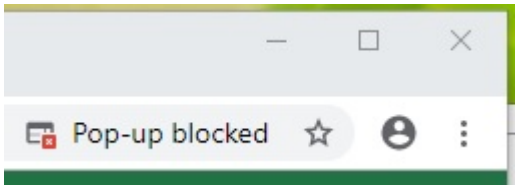
   You must have the service running in the browser before logging in to Oracle Smart View for Office (Mac and Browser).
2. Open another tab in the browser and log in to **portal.office.com** using your Office 365 credentials.
3. Select **Excel**.
4. On the **Welcome to Excel** page, click **New blank workbook**, or open an existing workbook.
5. Select the Smart View ribbon.
6. In the Smart View ribbon, click **Home** to launch the Smart View Home panel, where the library folder and cubes are displayed.

> **Note**
>
> - Starting in 21.09, an "Update is available" message is displayed when starting Smart View (Mac and Browser). A new or updated manifest file is required to use the update. End users can ignore the message and continue using Smart View. Administrators can click on **Get update**, which will take them to the **Create Manifest File** page where they can create a new manifest file or update the existing one and deploy it to users.
> - To allow pop-ups in Chrome, see Allowing Pop-ups from Office Online in Chrome.
> - To resolve any errors on installing custom functions in the add-in, try clearing cache in Chrome. See Clearing the Chrome Browser Cache.

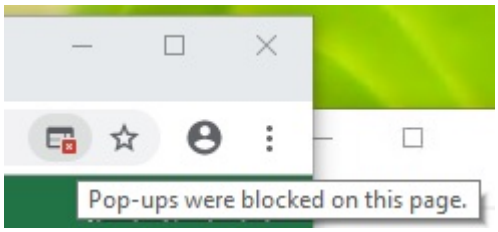
Allowing Pop-ups from Office Online in Chrome

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,  :



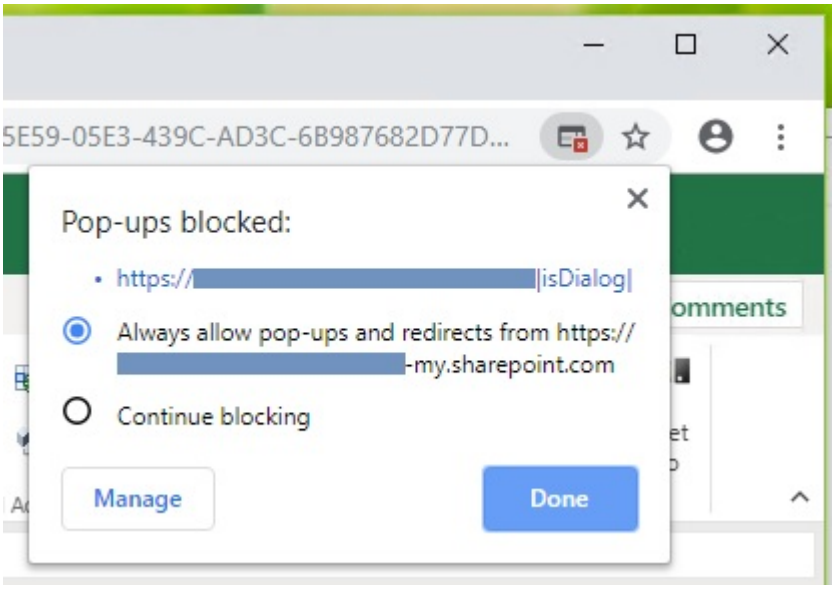
After a few seconds, only the pop-up blocker button, , is displayed in the address bar. The text that displays when you hover over the button indicates that pop-ups have been blocked on this page:



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.

Disconnecting from Data Sources

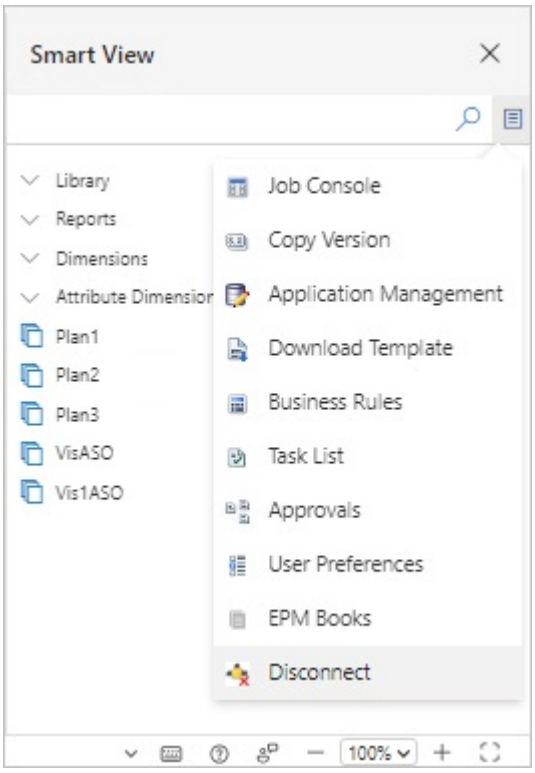
Use the **Disconnect** command in the **Actions** menu or right-click menu to disconnect from a connected data source on a sheet.

Applies to: Cloud EPM data source providers

To disconnect from a connected data source on a sheet:

1. Launch the Smart View Home panel by selecting **Home** from the Smart View ribbon.
2. Click the **Actions** button, , to display the **Actions** menu, and select **Disconnect**.

Figure 4-1 Disconnect Operation in the Actions Menu



Alternatively, right-click anywhere in the Smart View Home panel to display the **Actions** menu, and then select **Disconnect**.

This action disconnects the connected data source being used in the current workbook.

> **Note**
>
> After performing a **Disconnect**:
>
> - On the Mac, the Oracle Cloud Sign In page for your business process is displayed in the Smart View panel.
> - On Chrome, a new tab is opened containing the Oracle Cloud Sign In page for your business process.

3. To reconnect to the data source after disconnecting, assuming you have not closed the file containing Smart View content:
   a. Log in to the data source to which you were previously connected.
      - **Mac:**
        i. In the Smart View Home panel, where the Oracle Cloud Sign In page is displayed, enter your user login credentials.

           After login, a portion of the Cloud EPM business process home page will display in the panel, along with the  button in the upper right corner.

        ii. Click the  button and select **Reload** from the drop-down menu.

            The Library for the connected data source is displayed in the Smart View Home panel.

            > **Note**
            >
            > You should still be on the sheet containing Smart View content.

      - **Chrome:**
        i. In the tab containing the Oracle Cloud Sign In page, enter your login credentials.

           > **Note**
           >
           > This is the tab that opened when you selected the **Disconnect** action in the previous step.

           After login, the Cloud EPM business process home page is displayed.

        ii. Return to the browser tab containing the Smart View content with which you were previously working.

   b. Select the Smart View ribbon, and then click **Refresh**.

      Alternatively, if the provider or provider ad hoc ribbon is displayed, you can use the **Refresh** button on that ribbon.

      Repeat this step for each sheet in the workbook.

> **Note**
>
> On Chrome, if the Smart View **Refresh** doesn't work, try refreshing the browser page using the Chrome **Reload** button, .

5

Smart View Options

Related Topics

- Setting Smart View Options
  Set options for displaying data, members, formatting, and advanced settings using the Smart View Options.
- Advanced Options
  Set Advanced Options for administrative and other advanced tasks.
- Data Options
  Set Data options to control the display of data cells.
- Member Options
  Set Member options to define how members are displayed in forms and ad hoc grids.
- Formatting Options
  Set Formatting options to control the textual display of members and data.
- Cell Styles
  Set Cell Styles to control the display of members and data with respect to cell background color and precedence.

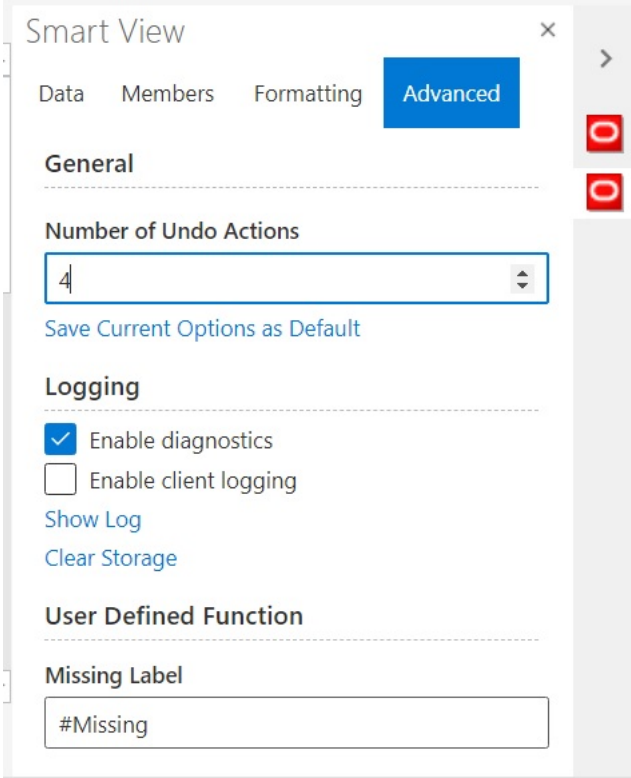
Setting Smart View Options

Set options for displaying data, members, formatting, and advanced settings using the Smart View Options.

In the **Options** panel, you can set global options in the **Advanced** tab. You can set sheets options, including display and formatting options, in the **Data**, **Members**, and **Formatting** tabs.

The following is an example of the **Advanced** tab of the Options panel. In this example, the **Number of Undo Actions** is changed to 4 (the default is 0), and **Enable diagnostics** is checked (the default is unchecked).

Figure 5-1 Options Panel, Advanced Tab



To summarize:

- **Global options** apply to the entire current workbook, including any new sheets added to the current workbook, and to workbooks that are created later. Changes to global options also affect existing sheets and workbooks. The options that appear on the **Advanced** tab of the **Options** panel are generally global options.
- **Sheet options** are specific to the sheet for which they are set. The options that appear on the **Data**, **Members**, and **Formatting** tabs of the **Options** panel are generally sheet options.

  You can apply your sheet option selections to all sheets in the current workbook by clicking the **Apply to All Sheets** button at the bottom of the **Options** panel.

  You can also save sheet options as the default for any new content that you import from a data source by using the **Save Current Options as Default** command in the **Advanced** tab of the **Options** panel.

Advanced Options

Set Advanced Options for administrative and other advanced tasks.

Options in the **Advanced** tab are global options that apply to the entire current workbook, including new sheets added to the current workbook, and become the default for all existing and new workbooks.

The **Advanced** tab of the **Options** panel is always available. You can access the **Advanced** tab before performing operations, such as performing ad hoc, opening a form, setting the active connection for the sheet, or setting the connection for functions.

To set advanced options:

1. In the Smart View ribbon, click the **Options** button, , to launch the **Options** panel.
2. In the **Options** panel, select the **Advanced** tab.
3. Make selections in the **Advanced** tab as described in Advanced Options.
4. **Optional:** Continue making changes to options in the **Data**, **Members,** or **Formatting** tabs.
5. Click × in the top right corner to close **Options**.

> **Note**
>
> Clicking the **Apply to All Sheets** button is not required. The options that appear in the **Advanced** tab always apply to all sheets, regardless of whether you click **Apply to All Sheets**.
> However, if you have made changes in the **Data**, **Members**, or **Formatting** tabs, you must click **Apply to All Sheets** in order to apply those changes to all sheets in the workbook.

Advanced Options

Table 5-1 Advanced Options

Option	Description
General	**General**
Number of Undo Actions	Set the number of Undo and Redo actions permitted on an operation (0 through 100). See Using Undo and Redo.
Save Current Options as Default	Select to save your modified option selections in the **Data**, **Member**, and **Formatting** tabs. After saving, your options selections become the default for any new content that you import from a data source. **Note** Changes made in the **Advanced** tab automatically become the default settings. You do not need to select the **Save Current Options as Default** command to save the **Advanced** options.
Logging	**Logging**
Enable diagnostics	Select to enable diagnostics.
Enable client logging	Select to enable client logging.
Show Log	Click to display the Smart View log in a separate window. You can view the log in the window or download it to a file.
Clear Storage	Click to clear the storage cache. The storage cache include any previously-selected options on the **Advanced** tab, as well as on the **Data**, **Members**, and **Formatting** tabs.
User-Defined Function	**User-Defined Function**

Table 5-1 (Cont.) Advanced Options

Option	Description
Missing Label	Specify a value for missing data in user-defined functions.

Data Options

Set Data options to control the display of data cells.

To set data options:

1. In the Smart View ribbon, click the **Options** button,  , to launch the **Options** panel.
2. In the **Options** panel, select the **Data** tab.
3. Make selections in the **Data** tab as described below.
   - For Oracle Fusion Cloud Enterprise Performance Management, see Data Options for Cloud EPM.
   - For Oracle Essbase, see Data Options for Oracle Essbase.
4. **Optional:** To apply your **Data** tab selections to all sheets in the current workbook, click the **Apply to All Sheets** button.

   > **Note**
   >
   > Clicking **Apply to All Sheets** applies the **Data** tab selections along with any other changes you may have made in the **Members** and **Formatting** tabs.

5. **Optional:** To save your **Data** tab selections as the default selections for any new content that you import from a data source, select the **Advanced** tab, and then click **Save Current Options as Default**.
6. Click × in the top right corner to close **Options**.

Data Options for Cloud EPM

Table 5-2 Data Options

Option	Description
Row Suppression	To streamline the grid, you can suppress rows that contain types of data that you do not need to view. **Note:** In suppressed rows, cell references to Excel formulas are not updated.
Zero	Suppress rows that contain only zeroes.
Invalid	Suppress rows that contain only invalid values.
Missing	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.
Underscore	Suppress rows that contain underscore characters in member names.
Column Suppression	To streamline the grid, you can suppress columns that contain types of data that you do not need to view. **Note:** In suppressed columns, cell references to Excel formulas are not updated.
Zero	Suppress columns that contain only zeroes.

Table 5-2 (Cont.) Data Options

Option	Description
Invalid	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.
Missing	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.
Underscore	Suppress columns that contain underscore characters in member names.
Block Suppression	**Block Suppression**
Suppress Missing Blocks	Suppress blocks of cells for which no data exists in the database.
Replacement	**Replacement**
Missing/No Data Label No Access Label	Data cells may contain missing data or data that you do not have permission to view. In such cells, by default, Smart View displays #Missing or #No Access, respectively, but you can change these labels. The #Missing replacement label enables 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. To change the labels, in any of these fields, enter the text of your choice (or leave the default). Text labels have the advantage of being descriptive, but they cause Excel functions to fail. In the #Missing field, you can enter #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** check box. 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.
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	**Ad Hoc Mode**
Navigate Without Data	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**.
Spreading	**Spreading**

Table 5-2 (Cont.) Data Options

Option	Description
Spreading Enabled	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.

> **Note**
>
> In Chrome, 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 Chrome 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).

Data Options for Oracle Essbase

Table 5-3 Data Options

Option	Description
Row Suppression	To streamline the grid, you can suppress rows that contain types of data that you do not need to view. **Note:** In suppressed rows, cell references to Excel formulas are not updated.
Zero	Suppress rows that contain only zeroes.
Invalid	Suppress rows that contain only invalid values.
Missing	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.
No Access	Suppress rows that contain data that you do not have the security access to view.
Underscore	Suppress rows that contain underscore characters in member names.
Replacement	**Replacement**

Table 5-3 (Cont.) Data Options

Option	Description
Missing/No Data Label No Access Label	Data cells may contain missing data or data that you do not have permission to view. In such cells, by default, Smart View displays #Missing or #No Access, respectively, but you can change these labels. The #Missing replacement label enables 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. To change the labels, in any of these fields, enter the text of your choice (or leave the default). Text labels have the advantage of being descriptive, but they cause Excel functions to fail. In the #Missing field, you can enter #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** check box. 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.
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	**Ad Hoc Mode**
Navigate Without Data	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**.

Member Options

Set Member options to define how members are displayed in forms and ad hoc grids.

To set member options:

1. In the Smart View ribbon, click the **Options** button,  , to launch the **Options** panel.
2. In the **Options** panel, select the **Members** tab.
3. Make selections in the **Members** tab as described below.
   - For Oracle Fusion Cloud Enterprise Performance Management, see Member Options for Cloud EPM.
   - For Oracle Essbase, see Member Options for Oracle Essbase.
4. **Optional:** To apply your **Members** tab selections to all sheets in the current workbook, click the **Apply to All Sheets** button.

> **Note**
>
> Clicking **Apply to All Sheets** applies the **Members** tab selections along with any other changes you may have made in the **Data** and **Formatting** tabs.

5. **Optional:** To save your **Members** tab selections as the default selections for any new content that you import from a data source, select the **Advanced** tab, and then click **Save Current Options as Default**.
6. Click × in the top right corner to close **Options**.

Member Options for Cloud EPM

Table 5-4 Member Options

Option	Description
General	**General**
Ancestor Placement	Select one of the following to specify ancestor position in hierarchies: • **Top** to display hierarchies in order from highest to lowest level • **Bottom** to display hierarchies in order from lowest to highest level
Indentation	Apples to ad hoc only. Select one of the following to specify how hierarchy levels are to be indented: • **None** • **Subitems** to indent descendants. Ancestors are left-justified in the column.
Member Name Display	Select one of the following to specify how to display member names in cells: • **Member Name or Alias** to display member names only or, if an alias table is being used, alias names only. • **Member Name and Alias** to display member names and their aliases. • **Distinct Member Name Only** to display fully qualified names.
Format Members as Text	Select one of the following to specify how to format members as text: • **Single Quote** • **None**
Member Retention	**Member Retention** For ad hoc grids only.
Include Selection	Display the selected member and the members retrieved as a result of the operation.
Within Selected Group	Perform ad hoc operations only on the selected group of cells, leaving 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 for **Zoom**, **Keep Only**, and **Remove Only**.
Remove Unselected Groups	For **Zoom In** or **Zoom Out**, remove all dimensions and members except the selected member and the members retrieved as a result of zooming.
Comments and Formula	**Comments and Formula**

Table 5-4 (Cont.) Member Options

Option	Description
Preserve Formulas and Comments in Ad Hoc	Preserves formulas and comments in ad hoc grids. If you clear this option, the formulas and comments are removed from the grid. **Note** Only Refresh operations are supported when **Preserve Formulas and Comments in Ad Hoc** is selected. Other ad hoc operations, such as **Zoom In** or **Keep Only**, are not supported.
Preserve Comments and Unknown Members	Preserves comments and unknown members in ad hoc grids. **Note** Only Refresh operations are supported when **Preserve Comments and Unknown Members** is selected. Other ad hoc operations, such as **Zoom In** or **Keep Only**, are not supported.
Flex Forms: Preserve Grid on POV and User Variable Change	Retains modified members on a flex form after a POV or user variable change. If this option is not selected, any added rows or columns in the flex form will be removed upon a POV or user variable change. For more information, see Retaining Modified Members on Flex Forms After POV or User Variable Change.

Member Options for Oracle Essbase

Table 5-5 Member Options

Option	Description
General	**General**
Ancestor Placement	Select one of the following to specify ancestor position in hierarchies: • **Top** to display hierarchies in order from highest to lowest level • **Bottom** to display hierarchies in order from lowest to highest level
Indentation	Select one of the following to specify how hierarchy levels are to be indented: • **None** • **Subitems** to indent descendants. Ancestors are left-justified in the column. • **Totals** to indent ancestors. Descendants are left-justified in the column.

Table 5-5 (Cont.) Member Options

Option	Description
Member Name Display	Select one of the following to specify how to display member names in cells: • **Member Name or Alias** to display member names only or, if an alias table is being used, alias names only. • **Distinct Member Name Only** to display fully qualified names. • **Distinct Member Name and Alias** to display fully qualified names and their aliases.
Format Members as Text	Select one of the following to specify how to format members as text: • **Single Quote** • **None**
Member Retention	**Member Retention**
Include Selection	Display the selected member and the members retrieved as a result of the operation.
Within Selected Group	Perform ad hoc operations only on the selected group of cells, leaving 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 for **Zoom**, **Keep Only**, and **Remove Only**.
Remove Unselected Groups	For **Zoom In** or **Zoom Out**, remove all dimensions and members except the selected member and the members retrieved as a result of zooming.
Comments and Formula	**Comments and Formula**
Preserve Formulas and Comments in Ad Hoc	Preserves formulas and comments in ad hoc grids. If you clear this option, the formulas and comments are removed from the grid. **Note** Only Refresh operations are supported when **Preserve Formulas and Comments in Ad Hoc** is selected. Other ad hoc operations, such as **Zoom In** or **Keep Only**, are not supported.
Formula Fill	Propagates formulas associated with member cells to the members retrieved as a result of zooming in. This option can be selected only if **Preserve Formulas and Comments in Ad Hoc** is selected. **Note** This option applies to formulas in both member and data cells.

Table 5-5 (Cont.) Member Options

Option	Description
Preserve Comments and Unknown Members	Preserves comments and unknown members in ad hoc grids. Your sheet may contain members that do not match database members. Selecting this option allows you to refresh an ad hoc grid with no warning message about comments or unknown members. To display messages about comments and unknown members, ensure that this option is cleared. This option can be selected only if **Preserve Formulas and Comments in Ad Hoc** is selected. **Note:** Only Refresh operations are supported when **Preserve Comments and Unknown Members** is selected. Other ad hoc operations, such as **Zoom In** or **Keep Only**, are not supported.

Formatting Options

Set Formatting options to control the textual display of members and data.

> **Note**
>
> - Most formatting options apply to both forms and ad hoc grids. Exceptions are noted in Table 1.
> - Formatting options are sheet-level options that are specific to the sheet for which they are set. Formatting options can also be saved for any new content that you import from a data source using the Save Current Options as Default command.
> - 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. In the Smart View ribbon, click the **Options** button, , to launch the **Options** panel.
2. In the **Options** panel, select the **Formatting** tab.
3. Make selections in the **Formatting** tab as described below.
   - For Oracle Fusion Cloud Enterprise Performance Management, see Formatting Options for Cloud EPM.
   - For Oracle Essbase, see Formatting Options for Oracle Essbase.
4. To set cell styles, see Cell Styles.
5. **Optional:** To apply your **Formatting** tab selections to all sheets in the current workbook, click the **Apply to All Sheets** button.

> **Note**
>
> Clicking **Apply to All Sheets** applies the **Formatting** tab selections along with any other changes you may have made in the **Data** and **Members** tabs.

6. **Optional:** To save your **Formatting** tab selections as the default selections for any new content that you import from a data source, select the **Advanced** tab, and then click **Save Current Options as Default**.
7. Click × in the top right corner to close **Options**.

Formatting Options for Cloud EPM

Table 5-6 Formatting Options

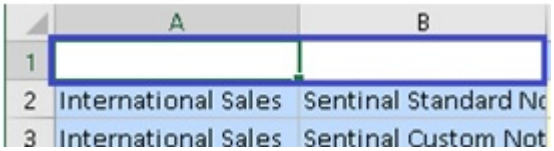
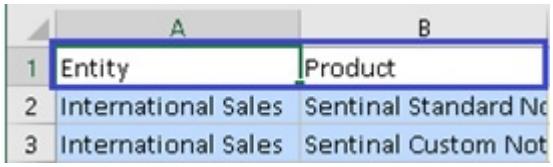
Option	Description
Dimension Headers	For ad hoc grids only. Print headers above row dimensions in the grid. For example, with Dimensions Headers not selected:  With Dimension Headers selected: 
Repeat Member Labels	For forms only. Facilitates the readability of forms by allowing member names to appear on each row of data. In forms where repeated members are merged into one cell, member names may be out of the screen view, necessitating much back and forth scrolling between the member names and the row data. Selecting **Repeat Member Labels** helps make forms easier to read and use.
Use Thousands Separator	Use a comma or other thousands separator in numerical data. Do not use # or $ as the thousands separator in Excel International Options.
Number of Decimal Places	Applies to ad hoc and forms. Overrides the setting defined in the form definition. Specify a decimal scale for the data values. For example, in Smart View, assume the decimal option selected is "1". All values will change one decimal place to the right. If the original value is 50.56, then after refresh the value will be displayed as 50.6. Similarly, if the option selected is "3", then the displayed value will be 50.560. The decimal settings in the form definition are lost when you open the form in Oracle Smart View for Office. This is because Excel formatting only accepts a single value fixed decimal length/value for precision and does not support the minimum, maximum value defined in the web application. This is the default behavior of Excel formatting and this is the behavior in Smart View as well. In Smart View, users must set the Decimal Places option (precision length) to be able to view the decimal value in cell.
Adjust Column Width	Adjusts the column width to fit cell contents automatically.

Table 5-6 (Cont.) Formatting Options

Option	Description
Use Cell Styles	For ad hoc grids only. Use background color formatting that you define for member styles, data styles, and miscellaneous styles (where applicable). Overrides any user or Excel formatting. 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. **Note** By default, when you start ad hoc analysis, **Use Cell Styles** is not enabled. So a form may display styles, but the same may seem to disappear if you open it as an ad hoc grid. See Using Smart View Formatting (Cell Styles) for working with cell styles in ad hoc grids.
Apply Styles	For forms only. Once a form is rendered within Smart View, select an option to view the formatting on the sheet: • **None**—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 **Cell styles**, **Custom styles**, or **Custom and cell styles** options. • **Cell styles**—Applies only Smart View cell styles to the sheet, as described in this table. • **Custom styles**—Applies only custom user-defined native Excel formatting to the sheet. • **Custom and cell styles**—Applies both Excel formatting and Smart View cell styles to the sheet. Note that when you select **Custom and cell styles**, cell styles take precedent over custom Excel formatting. After making a selection, refresh the sheet.
Cell Styles	**Cell Styles**
Member Styles	Set the background color for the following member styles: • Member • Formula (forms only)
Data Styles	Set the background color for the following data styles: • Dirty • Locked (forms only) • Cell Text (these are cell comments in Cloud EPM) • Attachment • Drill-through • Supporting Details • Read-only • Data

Table 5-6 (Cont.) Formatting Options

Option	Description
Miscellaneous Styles	Set the background color for the following miscellaneous styles: • Dimension Header (ad hoc only) • Comment (these are comments placed outside the grid) • Custom Label • Excel Formula in Form (forms only)

Formatting Options for Oracle Essbase

Table 5-7 Formatting Options

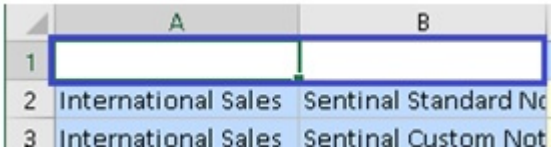
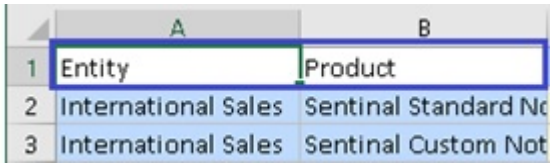
Option	Description
Dimension Headers	Print headers above row dimensions in the grid. For example, with Dimensions Headers not selected:  With Dimension Headers selected: 
Repeat Member Labels	Facilitates the readability of forms by allowing member names to appear on each row of data. Where repeated members are merged into one cell, member names may be out of the screen view, necessitating much back and forth scrolling between the member names and the row data. Selecting **Repeat Member Labels** helps make it easier to read and use.
Use Thousands Separator	Use a comma or other thousands separator in numerical data. Do not use # or $ as the thousands separator in Excel International Options.
Number of Decimal Places	Specify a decimal scale for the data values. For example, in Smart View, assume the decimal option selected is "1". All values will change one decimal place to the right. If the original value is 50.56, then after refresh the value will be displayed as 50.6. Similarly, if the option selected is "3", then the displayed value will be 50.560. The decimal settings in the form definition are lost when you open the form in Smart View. This is because Excel formatting only accepts a single value fixed decimal length/value for precision and does not support the minimum, maximum value defined in the web application. This is the default behavior of Excel formatting and this is the behavior in Smart View as well. In Smart View, users must set the Decimal Places option (precision length) to be able to view the decimal value in cell.

Table 5-7 (Cont.) Formatting Options

Option	Description
Use Cell Styles	Use background color formatting that you define for member styles, data styles, and miscellaneous styles (where applicable). Overrides any user or Excel formatting. 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. **Note** By default, when you start ad hoc analysis, **Use Cell Styles** is not enabled. See Using Smart View Formatting (Cell Styles) for more information working with cell styles.
Adjust Column Width	Adjusts the column width to fit cell contents automatically.
Cell Styles	**Cell Styles**
Member Styles	Set the background color for the following member styles: • Attribute • Shared • Parent • Child • Member • Duplicate Member • Member Drill-through • Formula
Data Styles	Set the background color for the following data styles: • Dirty • Drill-through • Read-only • Data
Miscellaneous Styles	Set the background color for the following miscellaneous styles: • Dimension Header (ad hoc only) • Comment (these are comments placed outside the grid)

Cell Styles

Set Cell Styles to control the display of members and data with respect to cell background color and precedence.

Cell Styles control the Smart View formatting for forms and ad hoc grids.

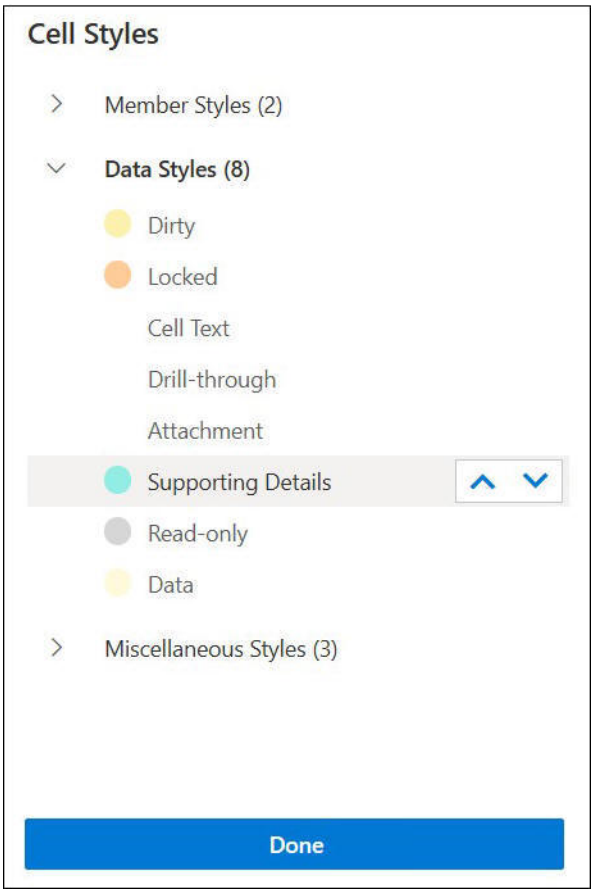
- For forms, you can directly set the cell styles as explained in this topic.
- For ad hoc grids, you need to first enable cell styles. See Using Smart View Formatting (Cell Styles) for enabling cell styles in ad hoc grids.

To set cell styles:

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

2. In the **Options** panel, select the **Formatting** tab.
3. In the **Formatting** tab, click **Cell Styles**.
4. Set the desired cell styles:
   a. Expand a cell style group.

      Note the three groupings of cell styles: Member Styles, Data Styles, and Miscellaneous Styles. In this example, the Data Styles group is expanded to show the available data types to which you can apply styles or change them. The example show these available cell styles: Dirty, Cell Text, Attachment, Drill-through, Supporting Details, Read-only, and Data.

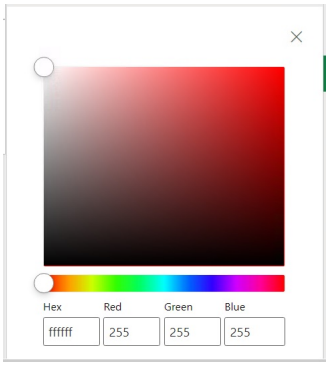


   b. Click a cell style to change.

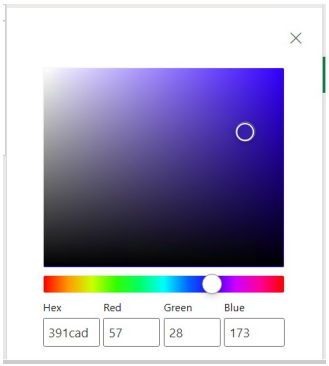
      A color picker control opens

   c. Drag the color controls (the circles in the top left corner of each color block) till you arrive at the color you want.

      Following is the default color control. Move the bottom circle to choose a color category and move the top circle to choose a color shade within that category:



Following is an example of changing the color to a category and shade of blue:



d. When finished, click the **X** in the top right corner to close the pane and return to the **Cell Styles** panel.

5. In the **Cell Styles** panel, click **Done** to return to the **Options** panel.
6. To re-order precedence of cell styles, use the **Move Up** and **Move Down** buttons

or drag and drop the cell styles at the desired position.

> **Note**
>
> - If a cell belongs to multiple member or data types, then the order of precedence determines the style that is applied to the cell. For example, a cell is an editable data cell and also contains supporting details. The Data cell style color is set as Orange, whereas the Supporting Details cell style color is set as Blue. If the Supporting Detail style appears above the Data style in the Cell Style panel, then the Supporting Data style takes precedence and the cell appears in Blue color. Conversely, if you move the Data style up and place it above the Supporting Details style, then the Data style takes precedence and the cell appears in Orange color.
> - The **Move Up** and **Move Down** buttons appear on hovering over a cell style.

7. Click × in the top right corner to close **Options**.

6

Dimensions and Members

Related Topics

- About Dimensions and Members
  Dimensions are data categories used to organize business data for retrieval and preservation of values.
- Displaying Point of View Dimensions
  Using the POV panel, you can display POV dimensions, select members from a POV dimension, and move them to and from the grid.
- Selecting Members
  In Smart View, you select members to use in ad hoc grids and Oracle Fusion Cloud Enterprise Performance Management forms.
- Viewing Member Formulas
  You can view the underlying formula in dimension member cells that contain a formula.
- Viewing Qualified Member Names
  You can view the qualified member names of members having non unique or identical names for better understanding and identification.
- Working with 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.

Displaying Point of View Dimensions

Using the POV panel, you can display POV dimensions, select members from a POV dimension, and move them to and from the grid.

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.

Displaying POV for Forms

To display point of view dimensions in forms:

1. Open a form.
   To open a form, see Opening Forms in Excel

2. From the provider ribbon, click **POV**

.

The POV dimensions are displayed in the **POV** panel.

Displaying POV for Ad Hoc Grids

To display point of view dimensions in ad hoc grid:

1. Display a grid in ad hoc mode.
   To open a grid, see Starting Ad Hoc Analysis.
2. From the provider ad hoc ribbon, click **POV**

.

The POV dimensions are displayed in the **POV** panel.

Related Topics:

- To select members from a POV dimension, see Selecting Members from a Point of View Dimension.
- To pivot dimensions and members back and forth between the grid and the POV, see Pivoting Dimensions or Members between the Grid and the POV.

Selecting Members

In Smart View, you select members to use in ad hoc grids and Oracle Fusion Cloud Enterprise Performance Management forms.

Related Topics

- Selecting Members from the Member Selector
  You can use the Member Selector dialog to select members for a variety of purposes: working on ad hoc grids, selecting and adding members to functions, displaying and changing dimensions in POV, and so on.
- Selecting Members from a Point of View Dimension
  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.
- 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 the free-form mode.

Selecting Members from the Member Selector

You can use the Member Selector dialog to select members for a variety of purposes: working on ad hoc grids, selecting and adding members to functions, displaying and changing dimensions in POV, and so on.

There are multiple ways to launch the **Member Selector** dialog. For example:

- **From an ad hoc grid:**

Select a dimension or member in the grid, and then from the provider ad hoc ribbon in the **Analysis** section , click **Member Selection**, . For example, if you're connected to Planning, click **Member Selection** in the Planning Ad Hoc ribbon.

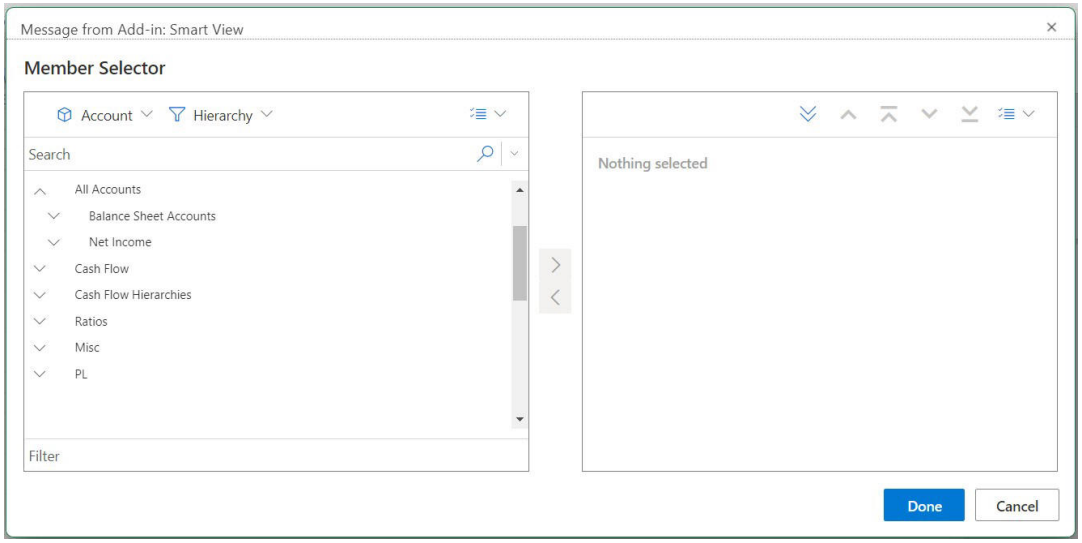
- **From the POV panel:**

  From the provider ad hoc ribbon, in the **Data** section, click **POV**, , to display the POV dimensions in the **POV** panel. Then, click next to a POV dimension, and select **Member Selector** from the drop-down list.

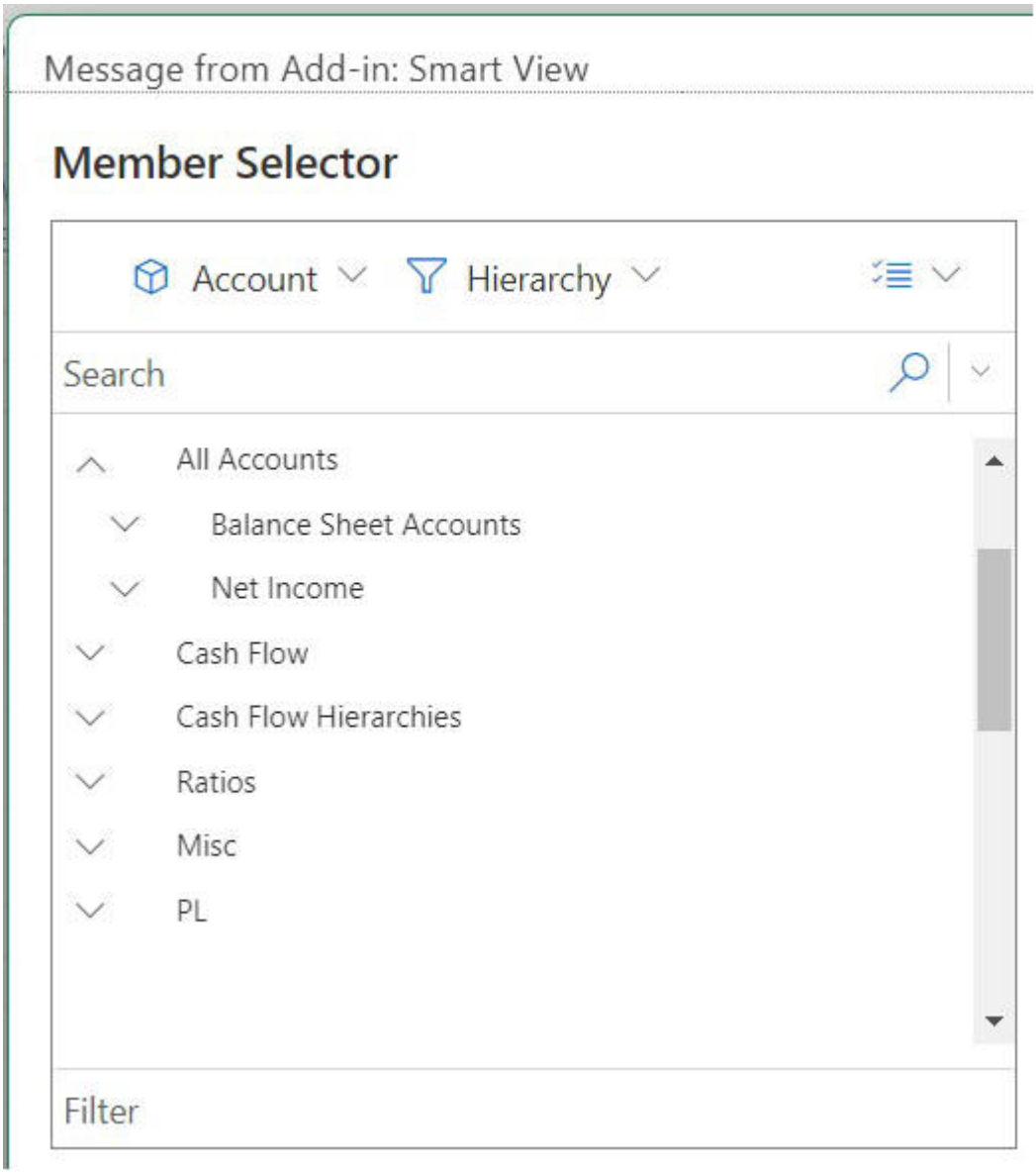
  For more information, see Selecting Members from a Point of View Dimension.

To select members:

1. Launch the **Member Selector** dialog.
   The Members List is displayed in the left and the Selection List is displayed on the right. In the below example, the Selection List appears empty as no member has been selected yet.

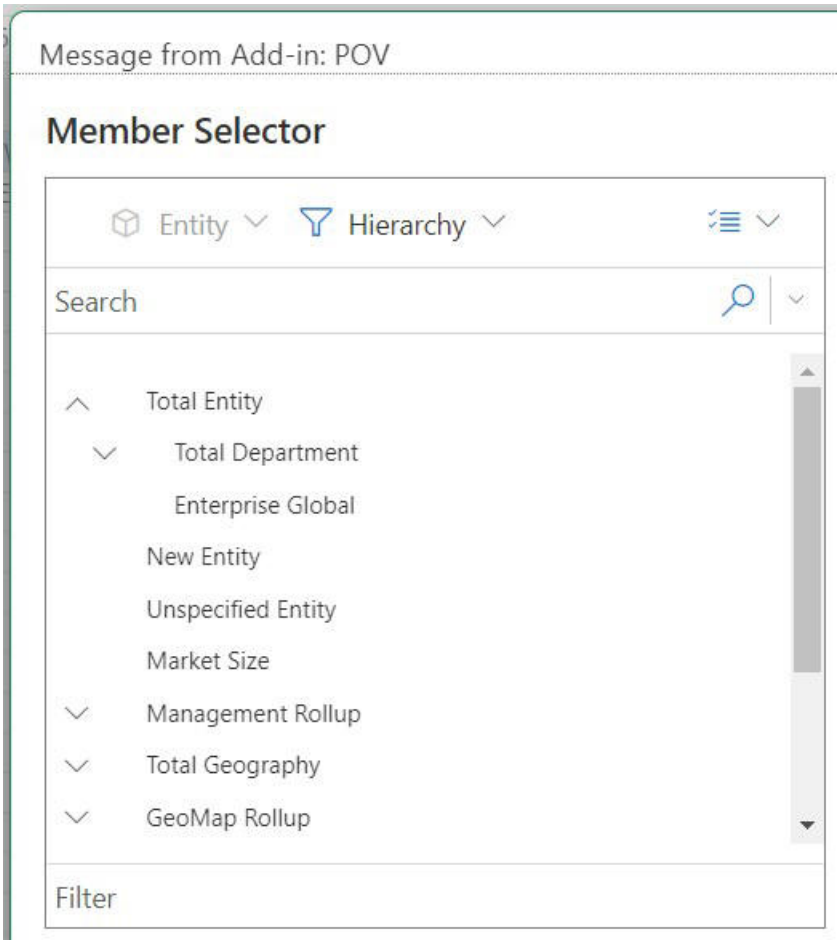


2. In the **Member Selector** dialog, click the dimension selector drop-down, (at the top left of the dialog box above the Members list), and select a dimension. The members belonging to the selected dimension are displayed in the Members list. In the below example, the Members List displays all the member belonging to the Account dimension.



If you accessed the **Member Selector** from a POV dimension in the **POV** 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. In the below example, the Entity dimension is disabled for selection.



3. **Optional.** To retrieve a specific set of members, use the **Hierarchy** drop-down,

   (accessed from the ellipsis button, ..., next to the dimension selector at the top left of the dialog).

   The member set filter will be applied to the highlighted member. To highlight a member, click on the member name so that the name is highlighted. If no member is highlighted, the filter will be applied to the dimension selected in the dimension selector drop-down.

   Filter options, which may vary by data source type, are:

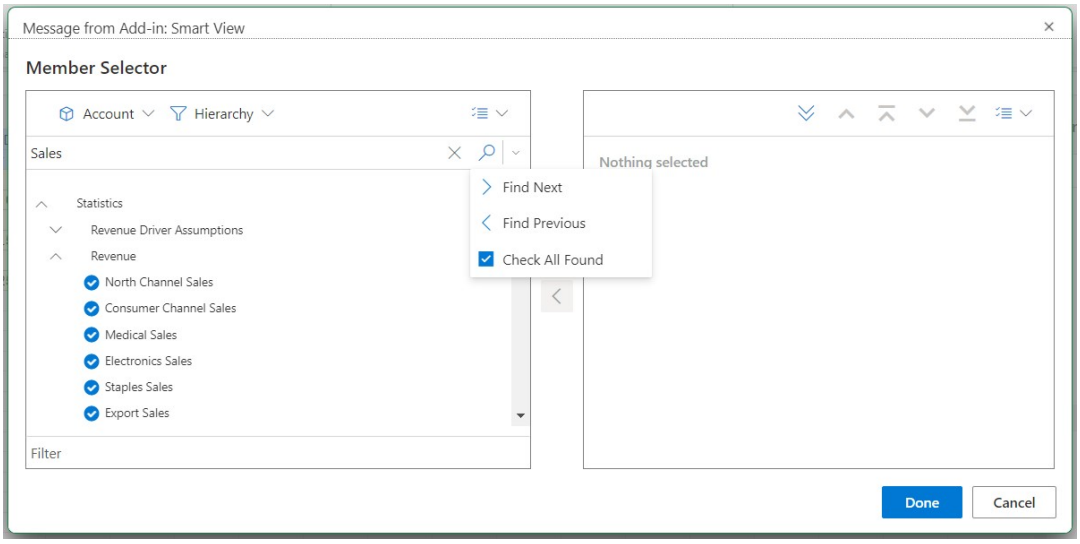
   - **Hierarchy** to select all the members in the hierarchy
   - **Descendants** to select all descendants of the selected member
   - **Descendants Inclusive** to include the selected member and all descendants of the selected member
   - **Children** to select only the children of the selected member
   - **Children Inclusive** to include the selected member and 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 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
- **Level 0 Descendants** to display all descendants of the selected member that have no children
- **Level** to display the **Filter Argument** dialog box, where you select one level in the hierarchy of members
- **Generation** to display the **Filter Argument** dialog box, where you select one generation in the hierarchy of members
- **UDA** to display the **Filter Argument** dialog box, where you select a user-defined attribute (available only if defined by the administrator)
- **Attribute** to display the **Filter Argument** dialog box, where you select an attribute name and attribute value (available only if defined by the administrator)

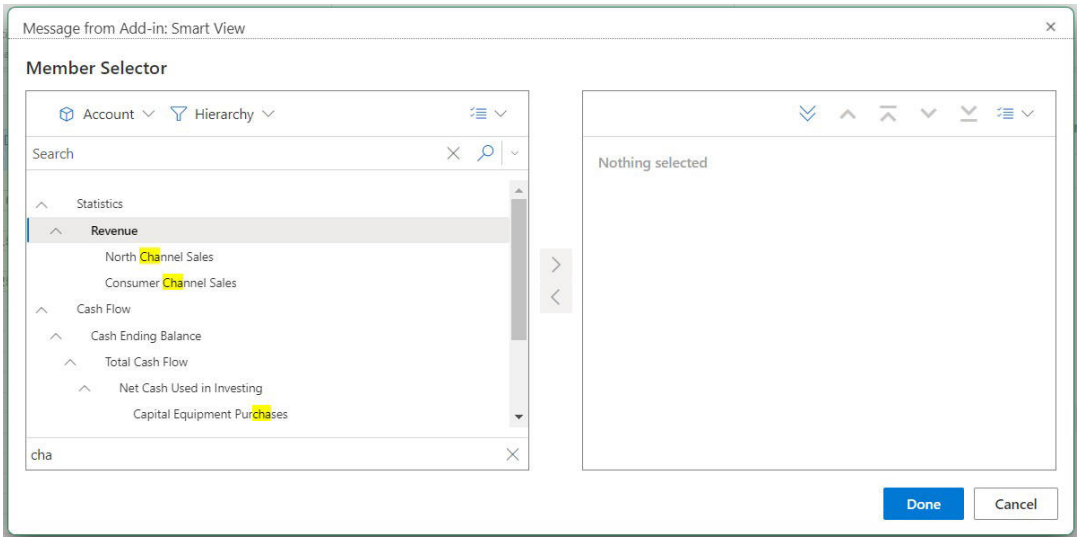
4. **Optional.** To search for members in the Members List, type the required word or letters in the Search box.
   The search results are displayed in the actual member hierarchy. You can take the following actions on the search results using the menu next to the search icon.

   - **Find Next and Find Previous**: Navigate to the next search result and previous search result. You can also keep clicking the search icon to navigate to the next search result.
   - **Check All Found**: Select all the search results in a single action for moving it across to the Selection list.

   In the below example, the term "Sales" is searched and the search results are displayed in the Members list. Further, the Check All Found option is selected so that a check mark appears next to all the search results



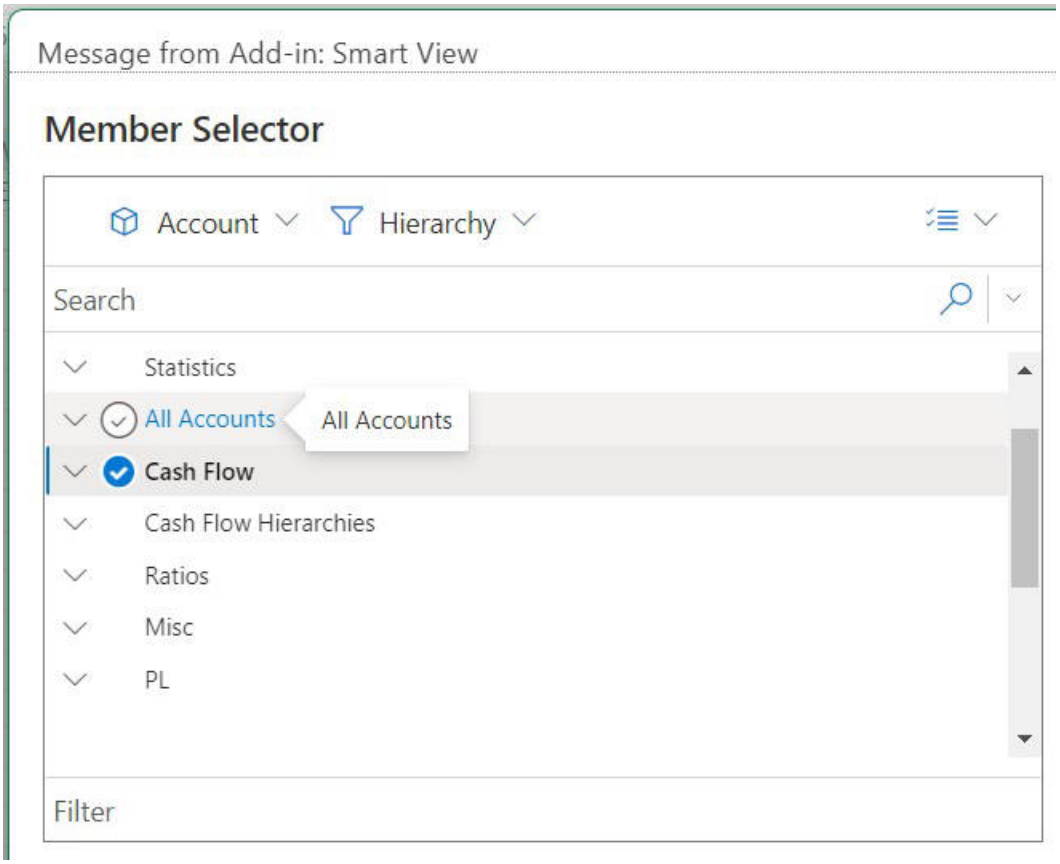
5. **Optional.** To filter the retrieved list of members in the Members List, start typing in the Filter box, present below the Members List. As you type, the list of members is filtered simultaneously, and the typed letters are highlighted in yellow color for easy identification. In the below example, members containing letters "cha" entered in the filter are highlighted and displayed in the Members list.



6. To choose members for selection, hover directly to the left of a member name and click the check box.

> **Note**
>
> The check box next to member names is hidden until the mouse hovers over it.

The figure below shows that for the "Cash Flow" member, the check box is blue, meaning the member has been chosen for selection. For the "All Accounts" member, the check box is gray, meaning the member has not yet been chosen but the cursor is hovering next to it.



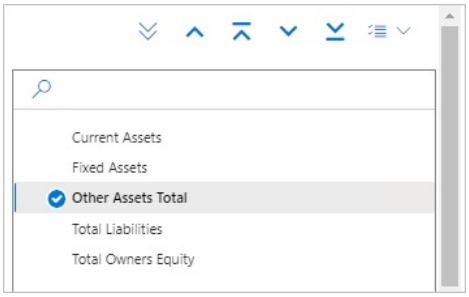
You can also:

- Click directly on a member name to choose a single member for selection.
- Use the mouse to drag a rectangle over a group of members to choose multiple members for selection.

7. **Optional.** In the Members List, select the **Actions** drop-down menu, , to perform these action:
   - **Check Children**, **Check Descendants**, and **Check Base Members** to place a check in the check box next to the applicable members, that is children, descendants, or base members of a selected member.
   - **Clear Checks** to clear all check marks.
   - **Expand All** and **Collapse All** to view the member hierarchy in expanded or collapsed form.
   - **Member Information** to view information about a selected member from the Members list.
   - **Alias Table** to view alias table information, if available, and change the alias table
8. Click the **Add** button, , to move the checked members to the Selection list at the right of the dialog.

Conversely, use the **Remove** button,  , to move members from the Selection list back to the Members list (the list on the left in the dialog).

9. **Optional.** In the Selections list, use the **Move Up**, **Move to Top**, **Move Down**, or **Move to Bottom** buttons to arrange the selected members in the order you want to them to appear on the sheet.
   The buttons that are enabled depend on the member you select in the Selections list. In the following example, five members appear in the Selections list and the middle member is selected. Therefore, all buttons are enabled since the middle member could be moved up or down..



10. **Optional.** Toggle the arrows above the Selection list to select how to insert the members in the grid:

inserts the selected members horizontally in a column

inserts the selected members vertically in a row

11. **Optional.** In the Selection list, select the **Actions** drop-down menu,  , to perform these actions:
    - **Select Dimension** to add the dimension you selected in the dimension selector drop-down (the first drop-down in the dialog box) to the Selection list.
    - **Remove All** to remove all the selected members
    - **Check All** and **Clear Checks** to add or remove checks from all the members in the Selection list.
12. Click **Done** 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.
13. From the provider ad hoc ribbon, click **Refresh**,  , to update the data to correspond to the selected members.

    You can also click  from the Smart View ribbon.

Selecting Members from a Point of View Dimension

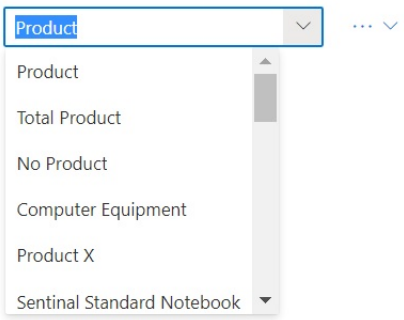
You can select members and filters for the dimensions that you want to include in the grid and move members to and from the grid.

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

To select a member to add to the POV drop-down list:

1. Open an ad hoc grid.
2. From the provider ad hoc ribbon (for example, from the Planning Ad Hoc ribbon), click **POV**  to display the POV dimensions in the POV panel.
3. In the **POV** panel, click the ellipsis button next to a POV dimension, and from the drop-down menu, choose **Member Selector**.
4. Select members in the **Member Selector**, and move them from the left to the right side of the dialog. For more information, see Selecting Members from the Member Selector.

   The selected members will appear in the drop-down menu for the dimension in the POV. For example, in the Vision application, if we select every member in the Product dimension, this would be a partial view of the resulting drop-down list:



Related Topics:

- To select members from the Member Selector, see Selecting Members from the Member Selector.
- To pivot a member or dimension from the POV to the grid, see Pivoting Dimensions or Members 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 the free-form mode.

You can use aliases from the alias table associated with the current grid in free-form mode. In ad hoc grid, 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.

Viewing Member Formulas

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

To view member formulas:

1. Open a form.
2. From the provider ribbon, select **More**, and then select **Member Formula**

   .

   The list of members containing formulas for the selected dimension are displayed in the **Member Formula** dialog
3. Select a member from the displayed list to view its formula in the **Member Formula** dialog.

Viewing Qualified Member Names

You can view the qualified member names of members having non unique or identical names for better understanding and identification.

Different members or member aliases may have identical names. For example, a database may have two members named "New York," one for New York City and one for New York State. Both members can appear as "New York" in the grid, but if you want to distinguish between them, you can display their qualified names instead. Qualified names include the member name and the names of its ancestors to the level that uniquely defines the member. For example, [Market].[New York].

Following are the ways in which you can view the qualified names of identical members:

Viewing Qualified Names in Cell Information

You can view qualified names of identical members in the Cell Information dialog. For more information, see Viewing Member Cell Information.

To view the qualified names:

1. Select a member cell in the grid.
2. From the provider ad hoc ribbon or Essbase ribbon, in the **Analysis** section, select **Cell Information**

   .
3. In the **Member Information** dialog, select the **Alias** tab to view the qualified name of the selected member.

Displaying Qualified Names on the Sheet

You can display the qualified names on the sheet using Smart View Options.

To display the qualified names of identical members on the sheet:

1. In the Smart View ribbon, select **Options**,  , to launch the **Options** panel.
2. In the **Options** panel, select the **Members** tab.

3. From the **Member Name Display** drop-down menu, select **Distinct Member Name Only**.
4. In the Smart View ribbon, click **Refresh**.
   The grid on the sheet is refreshed with the qualified names.

Working with Aliases and Alias Tables

Aliases are alternate names for database members.

Related Topics

- About Aliases
- Selecting Alias Tables
- Displaying Member Names and Aliases in a Grid

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 provider ad hoc 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.

Displaying Member Names and Aliases in a Grid

When connected to an Oracle Essbase data source, or a Cloud EPM Standard-mode application, you can display member names and their aliases from the currently selected alias table together in the same row.

> **Note**
>
> - This feature applies only to row members and not to column members.
> - Member names and their aliases are displayed in rows even when an alias table is not used, that is, when it is set to **None**. When the **Member Name and Alias** option is selected and the alias table is set to **None**, the row dimensions retain the aliases based on the last used alias table, while the POV columns are not impacted and continue to display the member names or aliases based on the last used alias table.
> - **Oracle Fusion Cloud Enterprise Performance Management:** To enable the **Member Name and Alias** option for Smart View users working with ad hoc grids, Service Administrators set the application option, **Smart View Ad Hoc Behavior**, to **Standard**. All new and recreated applications are automatically set to **Standard**.

To display both member names and aliases:

1. In Smart View, log in to your application.

   You may establish a connection by using a saved workbook containing ad hoc grids, or by starting a new ad hoc grid.

2. In the Smart View ribbon, click the **Options** button,  , to launch the **Options** panel.
3. In the **Options** panel, select the **Members** tab.
4. Under **General**, for **Member Name Display**, select **Member Name and Alias**.
5. In the Smart View ribbon or provider Ad Hoc ribbon, click **Refresh**.

For row members, both member names and their corresponding aliases are displayed. In this example, Account member names are shown in column A, and their aliases in column B.

	A	B	C
1			Entity
2			Year
3			Period
4	AllA	All Accounts	#Missing
5	BS	Balance Sheet Accounts	#Missing
6	1001	Total Assets	#Missing
7	1010	Current Assets	#Missing
8	1100	1100: Cash and Short Term Equivalents	#Missing
9	1110	1110: Cash	#Missing
10	1150	1150: Marketable Securities	#Missing
11	1200	1200: Accounts Receivable Total	#Missing
12	1210	1210: Accounts Receivable	#Missing
13	1220	1220: Other Receivables	#Missing
14	1260	1260: Allowance for Bad Debt	#Missing

7

Data and Data Cells

Related Topics

- Refreshing Data
  You can retrieve and refresh data for the current sheet in the workbook.
- Submitting Data
  You can update any type of data in the data source by submitting changed data from forms and ad hoc grids.
- Calculating Data
  After you submit new or changed data, you need to calculate the data in the database to reflect your changes.
- Working with Smart Lists
  You can enter data using custom drop-down selection lists called Smart Lists, which are accessed from data cells in forms and ad hoc grids.
- 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.
- Working with Drill-Through Reports
  Predefined by administrators, drill-through reports are available to users from specified individual data cells.
- Resolving Data Validation Errors
  If Service Administrators have set up any data validation rules, then users can view the outcomes of these rules in Smart View and fix errors directly in the form.
- Working with Cell Actions
  Expand and collapse cells, view underlying member formulas, view detailed member information, attach files and URLs, and review comments and cell history.

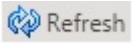
Refreshing Data

You can retrieve and refresh data for the current sheet in the workbook.

Refreshing applies to entire current sheet, and includes data in forms, ad hoc grids, and functions.

In the provider or Smart View ribbon, click **Refresh** to refresh the current sheet.

Figure 7-1 Refresh Icon



Notes about Refreshing

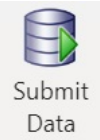
- If you have multiple sheets in your workbook, open each sheet and click **Refresh** to refresh them separately. Refreshing all sheets in a workbook at the same time is not supported.
- On ad hoc sheets, Excel filters are retained after refreshing.
- Selected POV members are reverted to dimension members after deleting some columns and refreshing a sheet. To avoid this, click the POV button to hide the POV dimensions, and ensure that you do not delete the column that contains the Page members.
- When working with multiple grids from multiple data sources in the same sheet, you can refresh grid data only for one connection at a time.
  For example, you are working on a sheet with Grid 1 and Grid 2 connected to Planning and Grid 3 connected to Tax Reporting. If you use the **Refresh** option on the Smart View ribbon for Tax Reporting, only Grid 3 is refreshed. To refresh Grid 1 and 2, use the **Refresh** option on the Smart View ribbon for Planning. Since both grids belong to the same connection, that is Planning, they are refreshed in a single operation.

Submitting Data

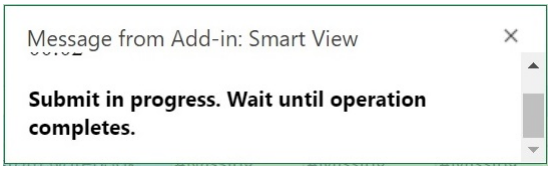
You can update any type of data in the data source by submitting changed data from forms and ad hoc grids.

To submit data:

1. Connect to the data source and open 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 or provider ribbon, click the **Submit Data** button:



A message is displayed showing you the progress of the submit operation:



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

When the submit operation is complete, the progress message closes automatically. You may not make any changes to the grid or form, or switch to a different worksheet, until the progress message is closed. For more information, see Guidelines for Submitting Data.

> **Note**
>
> In the browser version of Excel 365, the **Submit Data** button is disabled during the submit operation, while the progress message is displayed. However, in Excel 365 for the Mac, the **Submit Data** button is not disabled, even though the progress message is displayed. To prevent Excel 365 on the Mac from hanging, do not click the **Submit Data** button until the progress message is closed.

Guidelines for Submitting Data

Consider the following guidelines while submitting data.

- When submitting data in Oracle Smart View for Office (Mac and Browser), a message is displayed showing you the progress of the submit operation. When the submit is complete, the progress message closes automatically.

  You may not make any changes to the grid or form, or switch to a different worksheet, until the progress message is closed. This prevents you from entering data into the sheet before the current submit is complete.

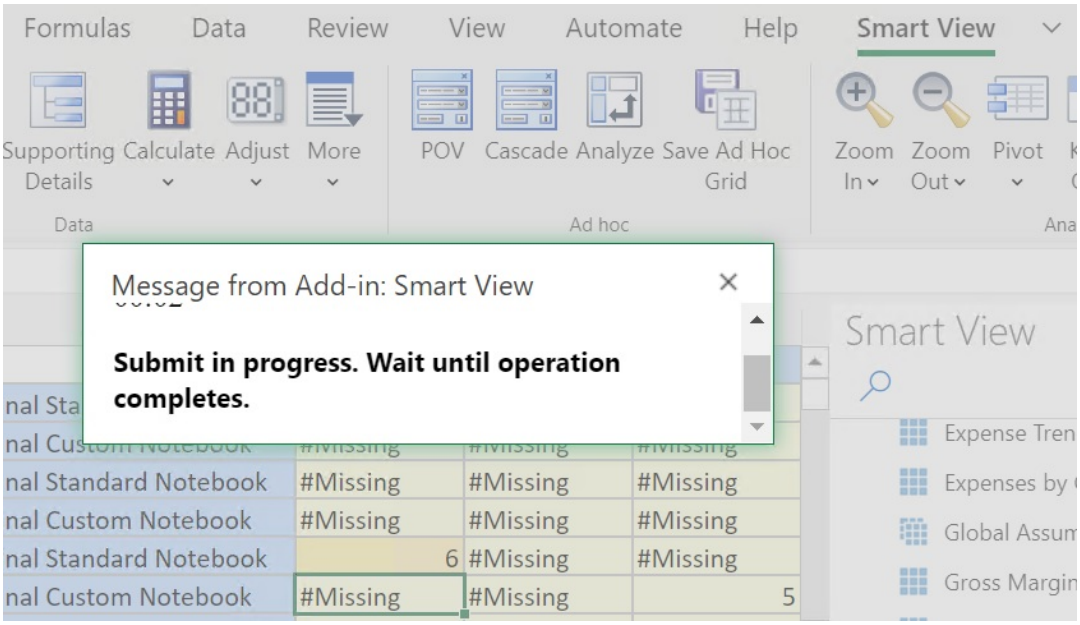
  Entering data before the submit is complete, whether in other cells on the sheet or in other sheets within the workbook, can result in an invalid grid or form.

  > **Note**
  >
  > In the browser version of Excel 365, the **Submit Data** button is disabled during the submit operation, while the progress message is displayed. However, in Excel 365 for the Mac, the **Submit Data** button is not disabled, even though the progress message is displayed. To prevent Excel 365 on the Mac from hanging, do not click the **Submit Data** button until the progress message is closed.

  Figure 1 shows an example of the progress message that's displayed upon submit. Notice that while the submit is completing, the sheet is grayed out. You cannot perform other operations on the sheet, or move to other worksheet tabs in the workbook.

  Additionally, errors originating in the business process, such as Planning, are displayed in a similar popup message.

Figure 7-2 Submit Progress Message



- If you are submitting data from forms:
  - In Oracle Fusion Cloud Enterprise Performance Management 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.
- 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.

Submitting Data without Refreshing

This option allows users to submit all data from the sheet.

Submit Without Refresh includes all data cells that you have explicitly modified (made dirty) and those that were not modified. All data cells are marked dirty and submitted.

> **Note**
>
> To help you identify modified cells, set a cell style for dirty cells.

To submit data without first refreshing:

1. Connect to the data source and open an ad hoc grid.
2. Modify the data as needed.
3. From the provider ad hoc ribbon or Essbase ribbon, select **Submit Data**, then **Submit Without Refresh**.
   Data for all cells on the sheet is submitted, whether or not the cells are dirty.

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 Fusion Cloud Enterprise Performance Management forms in Excel:

- **Business Rules** allows you to select a business rule to apply to the form.

  See Applying a Business Rule to a Cloud EPM Form.
- **Rules on Form** is created for each form to calculate subtotals.

  See Calculating Subtotals on a Cloud EPM 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 (☐/🗗) until the rules buttons are visible. Click ☐ or 🗗 again to restore the window to the size you require (maximized or resized window).

Applying a Business Rule to a Cloud EPM Form

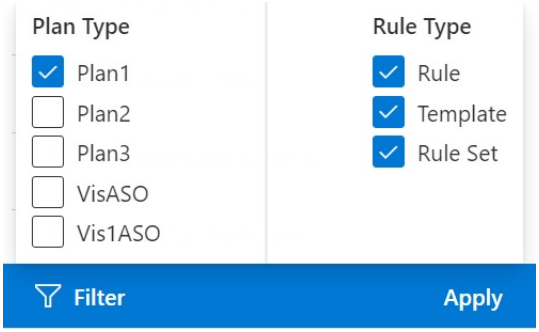
To apply a business rule to a form:

1. Open a form.
2. From the provider ribbon, select **Calculate**, and then select **Business Rules**.

   The business rules associated with the form are displayed in the Smart View panel.
3. **Optional:** Click the **Filter** button at the bottom of the Business Rules panel to filter rules by cube and rule type. All cubes and rule type options are selected by default. To narrow the search, clear the check boxes for cubes and rule types that you do not need to see, and

then click **Apply**. The list is filtered according to your selections. In this example, we would see business rules of all types that apply to only the Plan1 cube.

Figure 7-3 Business Rule Filtering Options



4. Select a business rule to launch it.
5. Enter any applicable runtime prompts, and then click **Run**.
6. 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 a Cloud EPM Form

To calculate the subtotals on a form:

1. Open a form.
2. From the provider ribbon, select **Calculate**, and then select **Rules on Form**.

> **Note**
>
> Click the **Filter** button at the bottom of the Business Rules panel to filter rules by cube and rule type. All cubes and rule type options are selected by default. To narrow the search, clear the check boxes for cubes and rule types that you do not need to see, and then click **Apply**. The list is filtered according to your selections.

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.

   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."

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.
2. Make the changes you require in the form.
3. Click **Submit**.

   The business rules associated with the form are displayed in a dialog page.
4. Enter any applicable runtime prompts, and then click **Save**.

Working with Smart Lists

You can enter data using custom drop-down selection lists called Smart Lists, which are accessed from data cells in forms and ad hoc grids.

A Smart List is a drop-down selection list displayed in a form or ad hoc grid cell as an alphanumeric text description, but stored in the database as a number. For example, an integer Smart List for a reporting cycle may have the values 1-5, for Yearly (1), Quarterly (2), Monthly (3), Daily (4), and Hourly (5). The values that are displayed on the form or ad hoc grid are Yearly, Quarterly, Monthly, Daily, and Hourly. When you select one of these values on the form or ad hoc grid, and submit the data, the number associated with it is stored in the database. This means that you do not have to remember the numeric values associated with each time period in the reporting cycle.

In Smart View, you access Smart Lists from custom drop-down lists in form or ad hoc grid cells. When clicking into cells whose members are associated with a Smart List, you click the down arrow that appears directly to the right of the cell, then select a drop-down list option instead of typing data; in fact, you cannot type in a cell that contains a Smart List.

For example, a data form may contain a Smart List called Justification that provides selections for Research, Customer Feedback, and Expansion. When you click into Account cells named Reason (whose members are associated with the Justification Smart List), a down arrow is displayed. When you click the down arrow, it expands into a drop-down list with the following selections:

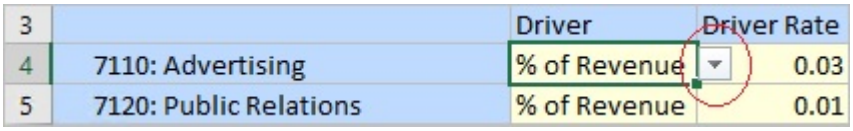
- Research
- Customer Feedback
- Expansion

You then select one of the Smart List options as the value for the cell.

To enter a Smart List value in a form or ad hoc grid cell:

1. Open a form or ad hoc grid.
2. In the form or ad hoc grid, click into the data cell for which you want to select a Smart List option.

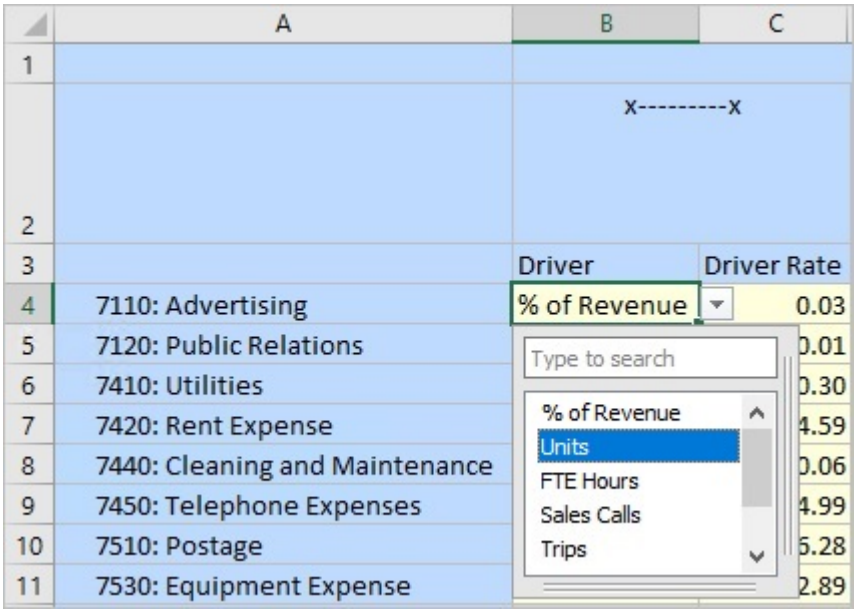
   A down arrow is displayed to the right of the cell.



> **Note**
>
> Only cells whose members are associated with Smart Lists contain Smart List drop-down lists.

3. Click the down arrow for the cell.

   The down arrow expands into a Smart List drop-down list with options from which you can choose.



4. From the Smart List, select an option.

   The option you select is entered into the data cell.

   After selecting a value, the cell becomes "dirty" and the data is ready to submit.

Guidelines for Working with Smart Lists

- You can hand-type a Smart List value in cells that contain Smart Lists and perform a Submit for both forms and ad hoc grids. However, if you type in an incorrect Smart List value, then you will see this error message, "The value you entered is not valid."
- In forms containing Smart Lists, after deleting all values in a row in order to enter and submit new data, the Smart Lists in that row are empty.

  Workaround: Remove row values, and then perform a **Submit** (that is, you submit #Missing values) or a **Refresh**. The Smart List drop-down arrows are then displayed properly. Now, you can enter new values for the same row.

- Smart Lists are supported with the HsGetValue and HsSetValue functions. However, with functions, you will not see the Smart List drop-down options. Instead:
  - HsGetValue - Simply retrieves the Smart List value as a string value.
  - HsSetValue - Submits the value as a string value.
- While working on Smart Lists in forms and ad hoc grids, if you press the **Delete** key in a Smart List cell, then the cell value is cleared but the Smart List is retained in the cell.

> **Note**
>
> If you are working on an ad hoc sheet in free-form state, then the Smart List values are not retained on pressing the **Delete** key. As a workaround, you have to refresh the sheet to get the Smart List values back in the drop-down list.

- Smart Lists must be set up and enabled by an administrator before you can use them in Smart View. For more information on enabling Smart Lists for forms and ad hoc grids, see the information Smart Lists in the relevant administration guide; for example see Administering Smart Lists in *Administering Planning*.

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.

To adjust values, you can select a single cell or a range of multiple cells, including continuous or discontinuous cell ranges. However, while selecting a range, if you select a read-only cell, a cell with supporting details, a cell with string or non-numeric values, or a cell outside the grid, then relevant error messages inform you that the adjust operation cannot be performed and prompt you to modify your selection.

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

To adjust data values:

1. In a form or ad hoc grid, click the data cell that contains the value to adjust.
2. From the provider ribbon or provider ad hoc ribbon, select **Adjust**, and then select **Adjust**.
3. In **Adjust Data**, select an option and 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
  While working in forms, you can spread or distribute values.
- Spreading Data for Time Periods
  In a form, the spreading rules for time periods are set in the web application as part of the dimension property settings.
- Spreading Data with Cell Locking
  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.
- Spreading Values using Grid Spread
  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.
- Spreading Values using Mass Allocation
  Using mass allocation, you can spread data to all descendants of a source cell and across all dimensions.

About Spreading Data

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

Applies to: Cloud EPM data source providers

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

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 Smart View, 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.
- There is limited support for spreading in flex forms.
  - Spreading is supported in flex forms only in cases where the Period dimension is not flex enabled. If the Period dimension is in a column, then flex form should not be enabled on columns. Similarly, if the Period dimension is in a row, then flex form should not be enabled on rows.
  - If Period dimension is a column, and flex form is enabled for columns, then spreading for time periods is not supported. Also, entering a value in a summary time period data cell, like a YearTotal column, also does not spread the new value by using the **Adjust**, **Grid Spread**, and **Mass Allocate** options.
  - If the **Show invalid members for flex form** option is enabled in a form where flex form is enabled only on rows, the rows contain any dimension other than Period, and the Period dimension in columns is not flex enabled, then spreading may work once, but does not work for subsequent spreading operations. While designing such forms, ensure that the **Show invalid members for flex form** check box, under **Smart View Options** in the **Layout** tab, is not selected.

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.

   Complete this step for each form you launch.

   > **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).

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 new values, submit the sheet.

Spreading Data with Cell Locking

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 form, select the cell or group of cells that you want to lock.
3. From the provider ribbon, select **Adjust**, and then select **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.
4. To unlock a cell, refresh the sheet.

Spreading Values using Grid Spread

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.

> **Note**
>
> - Grid spreading is supported in flex forms only in cases where the Period dimension is not flex enabled. If the Period dimension is in a column, then flex form should not be enabled on columns. Similarly, if the Period dimension is in a row, then flex form should not be enabled on rows.
> - If the **Show invalid members for flex form** option is enabled in a form where flex form is enabled only on rows, the rows contain any dimension other than Period, and the Period dimension in columns is not flex enabled, then grid spreading may work once, but does not work for subsequent spreading operations. While designing such forms, ensure that the **Show invalid members for flex form** check box, under **Smart View Options** in the **Layout** tab, is not selected so that grid spreading works in flex forms.

To spread values using Grid Spread:

1. Open a form or an ad hoc grid.
2. Position the cursor in the Subtotal or Total source cell whose value you want to spread to target cells.
3. From the provider ribbon or provider ad hoc ribbon, select **Adjust**, and then select **Grid Spread**.
4. 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

5. Select **Increase By** or **Decrease By** and enter a value or percentage.
6. 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.

7. 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.
8. Click **Spread**. The specified value or percentage is spread across the target cells, replacing former values with new ones.
9. To save the new values, submit the sheet.

Spreading Values using Mass Allocation

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.
- Mass allocation cannot be undone.

To spread values by mass allocation:

1. Open a form.
2. Position the cursor in the Total or Subtotal cell whose value you want to spread.
3. From the provider ribbon or provider ad hoc ribbon, select **Adjust**, and then select **Mass Allocate**

   .

4. Enter a new value in **Spread Value** to replace the current value, or from the drop-down 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
5. Select **Increase By** or **Decrease By** and enter a value or percentage.
6. 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.
7. 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.
8. Click **Spread**.

   The new values are automatically saved.

Working with Drill-Through Reports

Predefined by administrators, drill-through reports are available to users from specified individual data cells.

Using drill-through reports, you can drill through to the detailed data in a database from Smart View. Drill-through helps you to understand the source of a data value and get a granular level of detail for a value. For example, when you drill down on the Period dimension member Q4, you may see values for Jan, Feb and Mar.

Depending on your data source, you can open drill-through reports in the following ways:

If the Oracle Fusion Cloud Enterprise Performance Management source uses Oracle Enterprise Data Management Cloud to load data for drill-through reports, you can drill to source data in a new sheet or a web browser.

For Oracle Essbase data sources, you can drill through using grids or URLs. If the drill-through report is set as a grid, then it is displayed in a new sheet. If it is set as a URL, then the report is launched in a web browser.

Guidelines for Working with Drill-Through Reports

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. For more information on setting cell styles, see Formatting Options.
- The data displayed in a drill-through report is dynamic.
- You cannot use alias names for drill-through; you must use member names.
- In order to use the drill-through feature in Chrome, you must enable pop-ups. See the Enabling Pop-ups in Chrome for Using Drill-Through below.

Accessing Drill-Through Reports

To access a drill-through report:

1. Select a data cell associated with a drill-through report.
2. From the provider ribbon or provider ad hoc 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.

Enabling Pop-ups in Chrome for Using Drill-Through

To enable pop-ups in Chrome for using the drill-through feature, follow these steps:

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**.

Resolving Data Validation Errors

If Service Administrators have set up any data validation rules, then users can view the outcomes of these rules in Smart View and fix errors directly in the form.

Administrators can set up data validation rules to ensure that data meets company guidelines. While setting the rules, they can set:

- Criteria for the data you enter
- Background colors to call your attention to data validation errors
- Messages that tell you what the criteria is

For more information on how to set up data validation rule, see the Administration Guide for your business process.

If the data in a form does not meet the criteria in the data validation rules, the cells with errors are displayed with the assigned background color. Smart View users can also use the **Data Validation** panel, which lists the cells containing validation errors, grouped by validation rule. When you click a cell from this list, it gets highlighted in the form and the message associated with the rule appears in a tool tip.

To resolve data validation errors:

1. Open a form with errors and hover your cursor over the cell having a non-default colored background to view the validation message.

   Your administrator typically calls your attention to cells having data validation rule errors by displaying them with a colored background.
2. From the provider ribbon, select **Data Validation**.
3. In the **Data Validation** panel, expand the validation rule and review the list of cells with errors.
4. Click each data cell that has validation errors and resolve each error based on the instructions in the data validation message.

   As you resolve errors, those cells are removed the list.
5. When you have resolved all errors, submit the data.

   The background color and validation messages are cleared from the cells. If you open the **Data Validation** panel now, it too appears blank.

Working with Cell Actions

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

Applies to: Cloud EPM data source providers

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 provider ribbon, select **Cell Actions**, and then select **Expand/Collapse** 
   .

Adding Cell Comments

You can add one or more comments per data cell.

Each data cell can contain comments from multiple users. You can also add the same comment in a range of contiguous data cells. Cells that contain comments can be associated with a cell style.

The character limit set in Oracle Fusion Cloud Enterprise Performance Management is applied.

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
- Add same comment to contiguous or adjacent cell ranges at the same time.
- View the comments that you and other users have added
- Delete comments that you have entered.

> **Note**
>
> You cannot delete comments entered by other users.
>
> When you delete a comment, a dialog box asking you to confirm the deletion is *not* displayed.

To add comments to a data cell:

1. In an ad hoc grid or a form, select a data cell or a range of data cells.

   Use the **Shift** key to select a range of data cells. Do not use the **Ctrl** key to select cell ranges.
2. From the provider ribbon or provider ad hoc ribbon, select **Cell Actions**, and then select **Cell Actions**
   
   .
3. In the **Cell Actions** dialog box, select **Text**, and enter your comment.
4. If you have selected a range of cells, you can either enter comments for one cell at a time or apply the comment to all selected cells.
   - To enter a comment for one cell, select the cell from the drop-down menu and enter the comment.
   - To enter a comment for all selected cells, select **Apply to all selected cells**.
5. Click **Post** to save the comment.
6. 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 by way of URLs or files.
- Attach same document as a URL to contiguous or adjacent cell ranges at the same time.

> **Note**
>
> You cannot attach same document as a file to cell ranges at the same time. You can attach files to one cell at a time.

- 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.

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.

   Use the **Shift** key to select a range of data cells. Do not use the **Ctrl** key to select cell ranges.

2. From the provider ribbon or provider ad hoc ribbon, select **Cell Actions**, and then select **Cell Actions**
   
   .

3. In the **Cell Actions** dialog box, select **Attachments** and do any of the following:
   - To attach a URL, enter the title and URL for the document that you want to attach.

     > **Note**
     >
     > If you have selected a range of cells, you can either attach URLs to one cell at a time or attach the same URL to all selected cells.
     >
     > – To attach a URL to one cell in the range, select the cell from the drop-down menu and attach the URL.
     >
     > – To attach the same URL to all selected cells in the range, select **Apply to all selected cells**.

   - To attach a file, click  , navigate to the file that you want to attach, select it, and click **Open**.

4. Click **Post** to save your attachment selections.
5. Click **Close** to close the dialog box.

> **Note**
>
> To define a background color for cells that have attachments, in Smart View **Options**, click **Formatting** and then click **Cell Styles**. Expand **Data Styles** and select **Attachment** to set the color.

Viewing Cell History

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

To view cell history:

1. In an ad hoc grid or a form, select a data cell.
2. From the provider ribbon or provider ad hoc ribbon, select **Cell Actions**, and then 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

8

Data Forms

You can work with Oracle Fusion Cloud Enterprise Performance Management forms to view and modify data.

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 Fusion Cloud Enterprise Performance Management forms in Excel.
- Excel Formulas in Forms
  Consider the guidelines in this topic while using Excel formulas in forms.
- Working with Dynamic User Variables
  When a Smart View form contains user variables, you can modify them in Oracle Smart View for Office (Mac and Browser).
- 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 ongoing and completed Oracle Fusion Cloud Enterprise Performance Management jobs and delete them if needed.
- Working with 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 Smart View.
- Working with Flex Forms
  Flex forms are a form type that provides flexible row management in Smart View.

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.

Applies to: Cloud EPM data source providers

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

Guidelines for Forms Opened in Smart View

Consider the following guidelines for 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.
- Composite forms are not supported. Starting in 21.05, Cloud EPM no longer officially supports composite forms.

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 view is set through the web application 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 Fusion Cloud Enterprise Performance Management forms in Excel.

To open a form:

1. Connect to a data source.
2. In the Smart View Home panel, expand the library tree list.
   Depending on the data source provider, you may see different artifacts indicated by the following icons:
   -  — Form
   -  — Flex Form
   -  — Smart Form
   -  — Saved Ad Hoc Grid
   -  — Dashboards
3. Do any of the following:
   - To select a form without opening it, click its icon or the area next to its name.
   - To open a form, click the form's name.
   - To open a form directly in ad hoc analysis mode, that is as an ad hoc grid, first select it, right-click on it, and then select the **Ad Hoc Analysis** option in the menu.

- To open an ad hoc grid as a form, first select it, right-click on it, and then select the **Open Form** option in the menu.
- To open a flex form, click the flex form's name.
- To open a flex form as a simple form or ad hoc grid, right-click the flex form icon, or the space after the flex form name and select the **Open Form** or **Ad Hoc Analysis** option.

4. **Optional:** View instructions associated with the form by clicking **More** and then **Instructions**

in the **Data** section in the provider ribbon.

Excel Formulas in Forms

Consider the guidelines in this topic while using 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 Fusion Cloud Enterprise Performance Management 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.
- A cell with formula displays the dirty cell style if the value in the cell reference, present either in the same sheet or another sheet, is updated. On submitting, the updated value in the formula cell also gets submitted.
- 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 Smart View form contains user variables, you can modify them in Oracle Smart View for Office (Mac and Browser).

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 provider 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 Selecto**r.

5. 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.

> **Note**
>
> - 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.
> - The Copy Version action is available based on role for authorized users like Service Administrators.

To copy a version:

1. From the provider 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**.

> **Note**
>
> 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 ongoing and completed Oracle Fusion Cloud Enterprise Performance Management jobs and delete them if needed.

To check the execution status of jobs:

1. From the provider ribbon, in the **Data** section, click **More** and then click **Job Console**.
2. View the list of jobs.
   By default, all jobs are displayed. You can filter the list of jobs using any of the following job criteria:
   - **Job 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.
3. **Optional:** To view the application name and the plan type of a job, select the job and click **Show Details**.
   To see details for all jobs in the list, click **Select All**, and then click **Show Details.**.
4. **Optional:** To delete a job, select the job and click **Delete**.
   To delete all jobs in the list, click **Select All**, and then click **Delete**.

   > **Note**
   >
   > Deleting a job only deletes it from the list in the **Job Console**. It does not cancel a job.
5. When you are finished viewing jobs, click **OK** to close the Job Console.

Working with Supporting Details

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

Supporting details serve as a built-in calculator for developing data that is not in the member outline. Supporting details can include text, values, and operators that define how data aggregates.

Adding Supporting Details

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

> **Note**
>
> - Supporting details cannot be added to non-level zero period, to read-only cells, and to locked cells.
> - When submitting supporting details,if the form is associated with rules set to **Run on Save**, the Business Rules dialog appears.

To add supporting details:

1. In a form or ad hoc grid, select the cells in which you want to add the supporting details.

   You can select one cell or a range of contiguous cells in a row or column. The selection cannot include a combination of rows and columns. Select cells that are in the local currency so that you can write to them.

2. From the provider ribbon in the **Data** section, click **Cell Actions** and then click **Supporting Details**
   
   .

   The **Supporting Details** dialog reflects your cell selection.

3. Enter a description over the initial "untitled" text.

   The text and its associated operator must be unique among children of the same parent. By default, you can enter up to 1,500 characters.

4. Use the buttons to set or change the indented hierarchy to reflect the desired structure and calculations.

   For example, click **Add Child** to add a line item directly below the selected item.

   For more information, see Setting Hierarchy in Supporting Details.

5. Set the mathematical relationships among the line items by selecting an operator for each of them.

   Select from these operators:

Operator	Function
+	Add
-	Subtract
*	Multiple

Operator	Function
/	Divide
~	Ignore

6. Enter data to set or calculate.

   Enter numbers using the same scaling that was set up for the form.

7. Click **Submit**.

   Values are dynamically calculated and aggregated before the data is submitted. Data on the form is also submitted.

Setting Hierarchy in Supporting Details

The supporting details hierarchy should reflect the type of information that supports the cell values and the mathematical operators that create the relationships. You can set and change this hierarchy.

To set hierarchy in supporting details:

1. In a form or ad hoc grid, select the cells with supporting details.
2. From the provider ribbon in the **Data** section, click **Cell Actions** and then click **Supporting Details**
   
   .
3. Set or change the rows that provide the details in the required hierarchy by putting the cursor on an item and clicking the options in this table:

Table 8-1 Supporting Details options and their results

Option	Result
Add Child	Adds an item one level below the selected cell. You can add an unlimited number of children, but consider its potential performance impact.
Add Sibling	Adds an item at the same level as the selected cell. You can add an unlimited number of siblings, but consider its potential performance impact.
Delete	Removes the selected item
Delete All	Simultaneously removes all supporting details
Promote	Moves the selected item to the next-higher level
Demote	Moves the selected item to the next-lower level
Move Up	Moves the selected item to before its sibling predecessor
Move Down	Moves the selected item to after its sibling successor
Duplicate Row	Adds a row below the selected item, duplicating its structure (text, operator, and values)

Table 8-1 (Cont.) Supporting Details options and their results

Option	Result
Fill	For rows, copies the data from the current cell to the cells to its right
Refresh	Gets the latest stored database values, restoring the previously saved values, and possibly overwriting changes you just made.

4. Click **Submit**.

Viewing and Changing Supporting Details

You can view and change the supporting details added in a cell.

Cells with supporting details can be indicated using cell styles so that they can be easily identified in a grid. To define a background color for cells with supporting details, in Smart View **Options**, click **Formatting**, and then click **Cell Styles**. Expand **Data Styles** and select **Supporting Details** to set the color.

To view or change supporting details:

1. In a form or ad hoc grid, select the cells for which to view or add supporting details.

   You can select one cell or a range of contiguous cells in a row or column. The selection cannot include a combination of rows and columns. Select cells that are in the local currency so that you can write to them.

2. From the provider ribbon in the **Data** section, click **Cell Actions** and then click **Supporting Details**
   
   .

   The **Supporting Details** dialog reflects your cell selection.

3. View the details or change the line items or calculations that aggregate the data in the selected cells.

> **Note**
>
> Supporting details must be edited only in the **Supporting Details** dialog box, and not in the grid. If you try to edit the cells with supporting details in the grid itself, then an error message appears stating "Data entry is not allowed for cells with supporting details".

Working with Smart Forms

Create and manage Smart Forms in Smart View.

Related Topics

- About Smart Forms
  You can create and manage Smart Forms in Smart View.

- Creating Smart Forms
  In Smart View, you create Smart Forms by saving ad hoc grids that contain grid labels and business calculations.
- Excel Functions Supported in Smart Forms
  Know the list of Excel functions supported in Smart Forms.

About Smart Forms

You can create and manage Smart Forms in Smart View.

Applies to: Cloud EPM data source providers

Smart Forms are a type of data form, created in Smart View and based on ad hoc grids. They support additional functionality that is 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 ad hoc grids to the applicable providers 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.

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 a 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 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 can use the **Save As Smart Form** option. 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.

Guidelines for Working with Smart Forms

Consider the following guidelines while working with Smart Forms.

- 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 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 Service Administrator or Power User role to save ad hoc grids as Smart Forms. As with regular forms, the service administrator must assign read/write access to Smart Forms for end users.
- In Smart View, you design Smart Forms in worksheets, where 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 and HsSetValue.
  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.
- 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 calculation engine of Excel, 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 a function is not supported, a message notifies 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. Also note the following:

- 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

In Smart View, you create Smart Forms by saving ad hoc grids that contain grid labels and business calculations.

To create a Smart Form:

1. Open an ad hoc grid.

   Alternatively, open a form and 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. Then, in the provider ad hoc ribbon, click **Save As Smart Form**.
4. In the **Save As Smart Form** dialog:
   - In **Grid**, 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**.
5. Click **OK**.

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

Excel Functions Supported in Smart Forms

Know the list of Excel functions 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 8-2 Alphabetical List of Excel Functions Supported in Smart Forms

Function	Category
ABS	Math and trigonometry
ACCRINT	Financial
ACCRINTM	Financial
ACOS	Math and trigonometry
ACOSH	Math and trigonometry
AMORDEGRC	Financial
AMORLINC	Financial
AND	Logical
ASIN	Math and trigonometry
ASINH	Math and trigonometry
ATAN	Math and trigonometry
ATAN2	Math and trigonometry
ATANH	Math and trigonometry
AVERAGE	Statistical
AVERAGEA	Statistical
CEILING	Math and trigonometry

Table 8-2 (Cont.) Alphabetical List of Excel Functions Supported in Smart Forms

Function	Category
COMBIN	Math and trigonometry
COS	Math and trigonometry
COSH	Math and trigonometry
COUNT	Statistical
COUNTA	Statistical
COUPDAYBS	Financial
COUPDAYS	Financial
COUPDAYSNC	Financial
COUPNCD	Financial
COUPNUM	Financial
COUPPCD	Financial
CUMIPMT	Financial
CUMPRINC	Financial
DATE	Date and time
DAY	Date and time
DAYS360	Date and time
DB	Financial
DDB	Financial
DEGREES	Math and trigonometry
DISC	Financial
DOLLARDE	Financial
DOLLARFR	Financial
DURATION	Financial
EDATE	Date and time
EFFECT	Financial
EOMONTH	Date and time
EVEN	Math and trigonometry
EXP	Math and trigonometry
FACT	Math and trigonometry
FACTDOUBLE	Math and trigonometry
FLOOR	Math and trigonometry
FV	Financial
FVSCHEDULE ***	Financial
GCD	Math and trigonometry
HOUR	Date and time
IF	Logical
IFERROR	Logical
- TRUE	Logical
- FALSE	Logical
INT	Math and trigonometry
INTRATE	Financial
IPMT	Financial
IRR	Financial
ISERR	Information

Table 8-2 (Cont.) Alphabetical List of Excel Functions Supported in Smart Forms

Function	Category
ISERROR	Information
ISPMT	Financial
LCM	Math and trigonometry
LEFT	Text
LN	Math and trigonometry
LOG	Math and trigonometry
LOG10	Math and trigonometry
MAX	Statistical
MDURATION	Financial
MID	Text
MIN	Statistical
MINUTE	Date and time
MIRR	Financial
MOD	Math and trigonometry
MONTH	Date and time
MROUND	Math and trigonometry
MULTINOMIAL	Math and trigonometry
NETWORKDAYS	Date and time
NOMINAL	Financial
NOT	Logical
NOW	Date and time
NPER	Financial
NPV	Financial
ODD	Math and trigonometry
OR	Logical
PI	Math and trigonometry
PMT	Financial
POWER	Math and trigonometry
PPMT	Financial
PRICE	Financial
PRICEDISC	Financial
PRICEMAT	Financial
PRODUCT	Math and trigonometry
PV	Financial
QUOTIENT	Math and trigonometry
RADIANS	Math and trigonometry
RAND	Math and trigonometry
RANDBETWEEN	Math and trigonometry
RATE	Financial
RECEIVED	Financial
RIGHT	Text
ROUND	Math and trigonometry
ROUNDDOWN	Math and trigonometry
ROUNDUP	Math and trigonometry

Table 8-2 (Cont.) Alphabetical List of Excel Functions Supported in Smart Forms

Function	Category
SECOND	Date and time
SIGN	Math and trigonometry
SIN	Math and trigonometry
SINH	Math and trigonometry
SLN	Financial
SQRT	Math and trigonometry
SQRTPI	Math and trigonometry
SUM	Math and trigonometry
SUMSQ	Math and trigonometry
SYD	Financial
TAN	Math and trigonometry
TANH	Math and trigonometry
TBILLEQ	Financial
TBILLPRICE	Financial
TBILLYIELD	Financial
TIME	Date and time
TODAY	Date and time
TRUNC	Math and trigonometry
WEEKDAY	Date and time
WEEKNUM	Date and time
WORKDAY	Date and time
XIRR	Financial
XNPV	Financial
YEAR	Date and time
YEARFRAC	Date and time
YIELD	Financial
YIELDDISC	Financial
YIELDMAT	Financial

***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}).

Excel Functions Supported in Smart Forms by Category

Financial Functions

ACCRINT

ACCRINTM

AMORDEGRC

AMORLINC

COUPDAYBS

COUPDAYS

COUPDAYSNC

COUPNCD

COUPNUM

COUPPCD

CUMIPMT

CUMPRINC

DB

DDB

DISC

DOLLARDE

DOLLARFR

DURATION

EFFECT

FV

FVSCHEDULE ***

INTRATE

IPMT

IRR

ISPMT

MDURATION

MIRR

NOMINAL

NPER

NPV

PMT

PPMT

PRICE

PRICEDISC

PRICEMAT

PV

RATE

RECEIVED

SLN

SYD

TBILLEQ

TBILLPRICE

TBILLYIELD

XIRR

XNPV

YIELD

YIELDDISC

YIELDMAT

***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

AVERAG

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

Working with Flex Forms

Flex forms are a form type that provides flexible row management in Smart View.

Related Topics

- About Flex Forms
  Flex forms are a form type that provides flexible row and column management in Smart View.
- Best Practices for Working with Flex Forms
  Contains best practices and guidelines for working with flex forms.
- Working with Flex Forms in Smart View
  With flex forms, you can rearrange row and column dimensions, and insert valid members or aliases from corresponding dimensions.
- Opening a Flex Form in Ad Hoc Mode and Submitting Data
  You can open a flex form in ad hoc mode, just like any regular form, use ad hoc analysis to modify the grid layout, and submit data.

About Flex Forms

Flex forms are a form type that provides flexible row and column management in Smart View.

Applies to: Cloud EPM data source providers

Flex forms retain all regular form properties and features, such as running business rules attached to the flex form. However, using flex forms, and depending on the flex form design, you can rearrange row and column members, and sort or move rows or columns. Modified row or column order is maintained on refresh and during submit.

In the web application, during form definition, Service Administrators select **Enable flex form on rows**, **Enable flex form on columns**, or both options, under **Smart View Options** in the **Layout** tab to enable flex form-specific features. Depending on those selections, dimension and member row cells and all data cells in a flex form are unprotected. For example, if only **Enable flex form on rows** is enabled, then column members are protected. If only **Enable flex form on columns**, then row members are protected. If both are enabled, then only the top left blank cells are protected.

In Smart View, the **Sheet Info** dialog displays the **Sheet Type** for flex forms as "Flex form". Flex forms can be part of task lists and you can open them as flex forms from a task list.

> **Note**
>
> Flex forms are used only in Smart View and not in the web application.

Best Practices for Working with Flex Forms

Contains best practices and guidelines for working with flex forms.

Related Topics

- General Guidelines for Flex Forms
- Selecting Members in Flex Forms
- Sorting in Flex Forms
- Using Suppression Options in Flex Forms
- Working with Shared Members and Suppression Options in Flex Forms

- Flexing Beyond the Form Definition
- Retaining Invalid Members on Flex Forms
- Retaining Formula, Label, and Comment Rows and Columns on Flex Forms
- Retaining Modified Members on Flex Forms After POV or User Variable Change
- Smart Push with Flex Forms
- Unsupported Features on Flex Forms

General Guidelines for Flex Forms

- You can modify both row and column members in flex forms.
- Any modification to a flex form will not be persisted between sessions.
  When a user modifies a flex form, the modified grid layout will only be persisted in the context of the current session. Reopening a flex form reverts the flex form layout to its original state.
- You may insert and delete member rows and columns in a flex form using the **Insert** and **Delete** actions using the right-click menu of Excel.
  Depending on whether the options **Enable flex form for rows**, **Enable flex form for columns**, or both, are enabled, you can insert or delete rows or columns within the flex form grid, not outside the grid.

  Service Administrators: In the form definition, choose either or both of the following options:

  – To allow users to insert or delete rows, select **Enable flex form for rows**
  – To allow users to insert or delete columns, select **Enable flex form for columns**
- Due to an issue with the browser version of Microsoft Excel 365, Oracle recommends selecting the entire column before inserting a column to the left or right. You may also select a cell and insert a column to the left. However, selecting a cell and then inserting a column to right causes the starting column cells to shift down one cell.
- Access permission settings are honored in flex forms.
- Valid intersections are honored in flex forms.
- Business rules may be run on flex forms.
- When a flex form with a business rule or Groovy rule to add a new dimension member (member on-the-fly) is executed from the form, the new member will not appear on the flex form after a refresh. To see the new member on the flex form, you must reopen the flex form.
- Flex forms can be opened as flex forms from a Task List.
- There is limited support for spreading in flex forms.
  – Spreading is supported in flex forms only in cases where the Period dimension is not flex enabled. If the Period dimension is in a column, then flex form should not be enabled on columns. Similarly, if the Period dimension is in a row, then flex form should not be enabled on rows.
  – If Period dimension is a column, and column is flex enabled, then spreading for time periods is not supported. Also, entering values in a summary time period data cell, like a YearTotal column, also does not spread the new value to the related cells while using the **Adjust**, **Grid Spread**, and **Mass Allocate** options.
  – If the **Show invalid members for flex form** option is enabled in a form where flex form is enabled only on rows, the rows contain any dimension other than Period, and

the Period dimension in columns is not flex enabled, then spreading may work once, but does not work for subsequent spreading operations. While designing such forms, ensure that the **Show invalid members for flex form** check box, under **Smart View Options** in the **Layout** tab, is not selected.

- You may delete rows and columns using the **Delete** key. However, when deleting rows or columns containing multiple dimensions, be sure to select all the dimension members in the row or column before pressing **Delete**.
  In the following example, there are three row dimensions on a flex form, Accounts, Market, and Year:

  D-Acc US Market FY18

  D-Acc US Market FY19

  D-Acc US Market FY20

  To remove the row for FY18 using the Delete key, be sure to select all three dimension members, D-Acc, US Market, and FY18 using the Ctrl key or Shift key, then press Delete.
- Under the Dimension Properties, if **Flex beyond form definition** is not selected for the flex form, then copy and paste is limited to the scope of the form definition. Flex forms must adhere to the hierarchies as defined in the form. Therefore, you cannot have any flex form members that are not part of the defined row or column members of the form.
  To allow adding members outside of the form definition, either by hand-typing or using copy and paste, the **Flex beyond form definition** option must be selected. For more information, see Flexing Beyond the Form Definition.
- Subtotaling calculation scripts and currency conversion calculation scripts will be generated and executed based on the original form definition.
- In the form definition, if **Enable flex form for rows**, **Enable flex form for columns**, or both, are selected, a flex form opened as a simple form can preserve comments in cells outside the form after refresh.
  However, when opened as a flex form:
  - If both the **Enable flex form for rows** and **Enable flex form for columns** options are selected, then comments are not preserved.
  - If only the **Enable flex form for rows** option is selected, then comments entered to the right of the form are preserved after refresh. Comments are not preserved if they are entered directly below the form.
  - If only the **Enable flex form for columns** option is selected, then comments entered below the form are preserved after refresh. Comments are not preserved if they are entered to the right of the form.
- Both member and alias display is not supported for flex forms:
  - In the Application Settings for the business process, in **Display Member Label as**, neither the **Member Name:Alias** or the **Alias:Member Name** option is supported.
  - During form definition, in **Dimension Properties**, selecting both the **Member name** and **Alias** options is not supported for flex forms. Select either **Member name** or **Alias**.
- When working with flex forms with multiple dimensions on rows or columns (where two or more dimensions with multiple members are placed on a row or columns):
  - Rows and columns appear expanded by default.
  - During form definition, to place dimensions members on separate rows or columns, in **Member Selection** on the flex form, choose **Place selection in separate rows** or **Place Selection in Separate Columns**. See the documentation on selecting

members for forms in your business process administration guide; for example, for Planning, see Selecting Members for Forms in *Administering Planning*.

- When entering numeric member names or shared members on a flex form, enter a single quotation mark (') before the member name.

  For example, for a numeric member name, such as 4077, enter:

  '4077

  For shared members, enter member names in the format:

  '[Parent].[Shared Member]

  For example:

  '[Sales Director 2].[410]

  '[Default_Sales Director 2].[Default_International Sales]

- User variables, dynamic user variables, dynamic user variables with attributes, and substitution variables are supported on flex form rows and columns. Users should change variables on the POV and perform a refresh for the rows and columns to update them to the new members.
- Excluded members may be entered on flex form rows or columns. Members that are excluded in the form definition can be entered on flex form rows and users are able to enter values and submit.
- In the form definition, when **Enable flex form for rows**, **Enable flex form for columns** or both are enabled, then the Segment properties **Hide** and **Read-only** are not supported for either rows or columns. **Hide** and **Read-only** are supported only in simple forms.

Selecting Members in Flex Forms

You can select row or column members to add to a flex form using the **Member Selection** dialog box. The **Member Selection** option is available only on flex forms, and not on simple forms.

To launch the **Member Selection** dialog:

1. Select the member cell.
2. On the provider ribbon, click **Member Selection**.

Use the **Member Selection** dialog to add row or column members to a flex form, similar to adding members to an ad hoc grid. The members you can add depend on the underlying form definition for the row or column dimensions:

- If the **Dimension Properties** setting, **Flex beyond form definition**, is selected, users may select members outside those specified in the form definition. For example, suppose a form includes only the Computer Accessories members from the Product dimension. If **Flex beyond form definition** is selected for the Product dimension, then users may add other members from Product, such as Notebooks or Tablets, to the flex form. These members will be retained upon refresh. For more information, see Flexing Beyond the Form Definition.
- In the form definition of a flex form, if specific members are not part of a dimension, then, even though you may be able to select and add those members in the **Member Selection** dialog, those members will be removed upon refresh.

> **Note**
>
> To add members outside the form definition, enable **Flex beyond form definition** on the applicable dimensions.

Member Selection uses the default alias table defined at the application level. When members are inserted on the grid, the members are displayed as member names until a Refresh is performed, and then aliases are displayed corresponding to the application setting.

Sorting in Flex Forms

- Sorting disables submitting of data as it changes member order in the column. After sorting you must refresh to submit data.
- Sorting can sometimes change the position of the column header member if the grid structure is not correct. Users need to ensure that sorting such a grid does not impact the integrity of the grid.

  To avoid undesirable sorting results, do not apply sorting to an entire column. Instead, select the grid members to sort, and then use Sort commands, Sort A to Z or Sort Z to A, or perform a custom sort.
- Due to an issue with the browser version of Microsoft Excel 365, when selecting column members in a flex form and performing a subsequent sort after an initial sort, the first member of the column does not sort, while the remaining members are sorted correctly.

Using Suppression Options in Flex Forms

- In the form designer, the **Use database suppression** option is not supported; however, the **Suppress missing blocks**, **Suppress missing data - Rows**, and **Suppress missing data - Columns** options are supported.

  > **Note**
  >
  > Groovy rules are not supported in flex forms when suppression options are enabled.

- The **Suppress missing blocks**, **Suppress missing data - Rows**, and **Suppress missing data - Columns** options defined in the web for a flex form are applied only when first opening the flex form in Smart View. Depending on the form definition, flex form users can enter members on columns or rows even though the suppression options are enabled in web form. Users can also enter data and submit data for the suppressed members.
  If the suppression options in Smart View Options, **Data Options** tab, for **Suppress Missing Blocks**, **Suppress Missing Rows**, and **Suppress Missing Columns** are selected, they are applied to the flex form. Users can uncheck these options and then add members (by typing them on the sheet or using **Member Selection**), enter data, submit data, and refresh the flex form.

Working with Shared Members and Suppression Options in Flex Forms

Consider the following scenario in form design, where:

1. Shared members are on the row, column, or both
2. **Drill on shared members** is enabled

3. **Suppress missing blocks** and **Suppress missing data** are enabled

When opening the form, shared members are converted to base member, and query is based on the base members.

When opened as a flex form (**Enable flex form for rows**, **Enable flex form for columns**, or both are selected), since the base member is beyond the form definition, if it is the only member in the flex form row or column, this error is shown: "Flex form cannot be refreshed or saved without valid members on Account dimension."

If there are other valid members on the row or column, and the **Show invalid members for flex form** option is enabled, then the base members will become comments.

Workarounds: To avoid this error, use one or both of the following workarounds:

- Enable the **Flex beyond form definition** option.
- Clear the **Drill on shared members** option.

Flexing Beyond the Form Definition

During form definition, when the **Flex beyond form definition** property is applied to row or column dimensions in flex forms, Smart View users may enter members outside the form definition for dimensions within the row or column axis of the form. This allows flex form users to enter data for members that are not displayed on the flex form. Users must have access to the valid members that they enter.

For example, using the Vision application, suppose the Product dimension is placed as a row dimension in a flex form. During form definition, only the Sentinal Standard Notebook and Sentinal Custom Notebook members in the Product dimension have been selected for display on the form. By enabling the **Flex beyond form definition** option for the Product dimension, Smart View users may enter other products from the Product dimension, such as Mouse or Keyboard, in the rows in the flex form. As long as they have access to those members, users can either add rows for additional members to the existing flex form or replace existing Product members with the Product members they require. To illustrate, note the following hierarchy:

```
Product
  Notebooks  <<this hierarchy is displayed in flex form)
    Sentinal Standard Notebook
    Sentinal Custom Notebook
  Computer Accessories  <<this hierarchy is not displayed in flex form)
    Keyboard
    Mouse
```

In a flex form with **Flex beyond form definition** disabled (not selected), users cannot add Computer Accessories or its descendants. Users can add Notebooks and its descendants.

In a flex form with **Flex beyond form definition** enabled (selected), users can add Computer Accessories and its descendants as well as Notebooks and its descendants.

During form definition, note the following when enabling the **Flex beyond form definition** property:

- In **Dimension Properties**, the **Flex beyond form definition** option will only be visible if either the **Enable flex form for rows** or **Enable flex form for columns** option, or both, is selected in **Smart View Options**.
- When there are multiple dimensions on the form rows, Oracle recommends that you select the **Flex beyond form definition** property for each applicable row or column dimension

individually. You may use the **Dimension Properties** option, **Apply to all row | column | page dimensions**, to apply the **Flex beyond form definition** property to all dimensions; however, use with care as all other dimension property selections will also be applied to all other dimensions.

See Designing Flex Forms in *Administering Planning*.

Retaining Invalid Members on Flex Forms

In flex forms, you can retain invalid members on the sheet after a refresh.

When entering member names in a flex form, errors may occur; for example, you may:

- Mistype or misspell a name, creating an invalid member in the cell
  See Example of Misspelled Member Name.
- Make an error when copying and pasting member names from one sheet to another, or within the same sheet, resulting in invalid members
  See Example of Missing Member Name on Multi-Dimension Row
- Enter a member name that is beyond the form definition, resulting in an invalid member
  See Example of Member Name Entered that is Outside of Form Definition

If **Show invalid members for flex form** is not enabled, then when the above situations occur, the rows or columns with invalid members are removed from the sheet upon refresh, making it difficult to know what the issue is, and forcing you to reenter member names.

The flex form can retain any invalid members on the form after refresh if the Oracle Fusion Cloud Enterprise Performance Management Service Administrator enables the **Show invalid members for flex form** check box under **Smart View Options** in the **Layout** tab of the form definition, described in Enabling the Invalid Member Option.

Related Topics:

Retaining and Resolving Invalid Members

Example of Misspelled Member Name

Example of Missing Member Name on Multi-Dimension Row

Example of Member Name Entered that is Outside of Form Definition

Enabling the Invalid Member Option

Retaining and Resolving Invalid Members

To retain and resolve invalid members:

1. In the flex form, add the rows, columns, or both, as you require.
2. Type or copy member names into the new rows, columns, or both.
3. Perform a refresh.
   Any invalid member cells are highlighted and #InvalidMember is displayed in the corresponding data cells.
4. Review the invalid member cells and correct any mistyped or missing members, and then refresh.
5. Repeat the previous step until all invalid members are corrected.

> **Note**
>
> - In rows and columns containing multiple dimensions, if even a single member is invalid, all members on the row or column are highlighted as invalid. For example, if a row contains the *Tablet* and *Current* members, and you type *Tablet* correctly, but type *Currnt* in error, both the Tablet and Currnt members will be highlighted as invalid. You should examine all the highlighted member names and correct those that are typed incorrectly.
> - After inserting a blank row or column into the flex form and performing a refresh, if no member names were entered, then the inserted row or column is highlighted as an invalid member row or column and remains on the flex form as a blank row or column.
> - Attempting to delete an entire row or column by selecting the invalid member cells of a row or column and pressing the **Delete** key will result in invalid members in the member cells upon refresh. To delete entire rows or columns on a flex form, use the **delete entire row** or **delete entire column** operations in Excel.

Following are some example scenarios that show you how to work with invalid members on the sheet.

Example of Misspelled Member Name

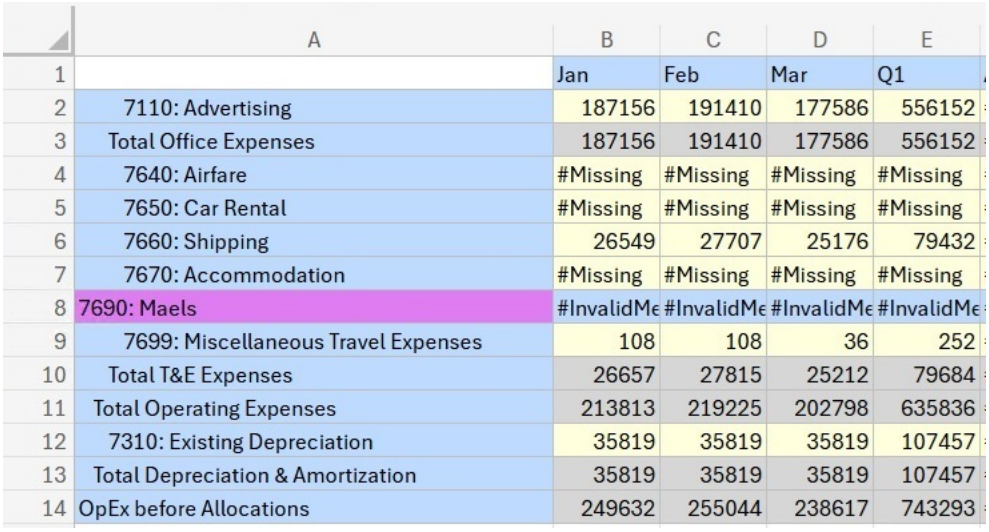
For example, based on the Vision application form, HR Expenses, you open the form as a flex form. The Service Administrator has enabled the Smart View options, "Enable flex form for rows" and "Show invalid members for flex form."

Figure 8-1 Flex Form Containing No "7690: Meals" Member

	A	B	C	D	E
1		Jan	Feb	Mar	Q1
2	7110: Advertising	187156	191410	177586	556152
3	Total Office Expenses	187156	191410	177586	556152
4	7640: Airfare	#Missing	#Missing	#Missing	#Missing
5	7650: Car Rental	#Missing	#Missing	#Missing	#Missing
6	7660: Shipping	26549	27707	25176	79432
7	7670: Accommodation	#Missing	#Missing	#Missing	#Missing
8	7699: Miscellaneous Travel Expenses	108	108	36	252
9	Total T&E Expenses	26657	27815	25212	79684
10	Total Operating Expenses	213813	219225	202798	635836
11	7310: Existing Depreciation	35819	35819	35819	107457
12	Total Depreciation & Amortization	35819	35819	35819	107457
13	OpEx before Allocations	249632	255044	238617	743293

You notice that the "7690: Meals" member is not present on the form so you set out to add it. You insert a row on the grid and begin typing, but make a spelling error. After refreshing, Smart View calls out the row for you with the member cells highlighted and the data cells displaying #InvalidMember.

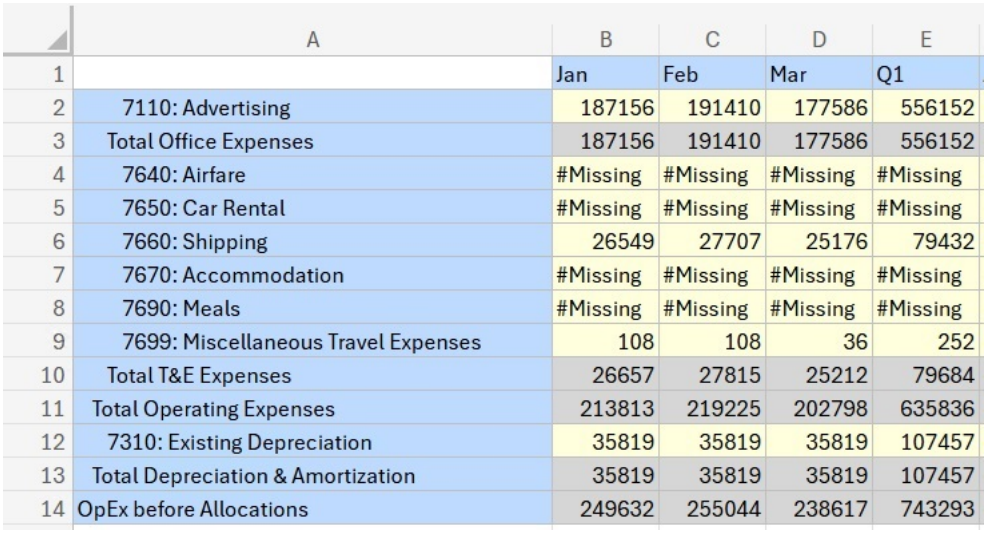
Figure 8-2 Flex Form with Invalid Member Row Highlighted



	A	B	C	D	E
1		Jan	Feb	Mar	Q1
2	7110: Advertising	187156	191410	177586	556152
3	Total Office Expenses	187156	191410	177586	556152
4	7640: Airfare	#Missing	#Missing	#Missing	#Missing
5	7650: Car Rental	#Missing	#Missing	#Missing	#Missing
6	7660: Shipping	26549	27707	25176	79432
7	7670: Accommodation	#Missing	#Missing	#Missing	#Missing
8	7690: Maels	#InvalidMe	#InvalidMe	#InvalidMe	#InvalidMe
9	7699: Miscellaneous Travel Expenses	108	108	36	252
10	Total T&E Expenses	26657	27815	25212	79684
11	Total Operating Expenses	213813	219225	202798	635836
12	7310: Existing Depreciation	35819	35819	35819	107457
13	Total Depreciation & Amortization	35819	35819	35819	107457
14	OpEx before Allocations	249632	255044	238617	743293

After fixing the spelling error, perform a refresh and note that the flex form is displayed correctly, with the valid member names and data.

Figure 8-3 Flex Form with Error Corrected and Valid Members Displayed

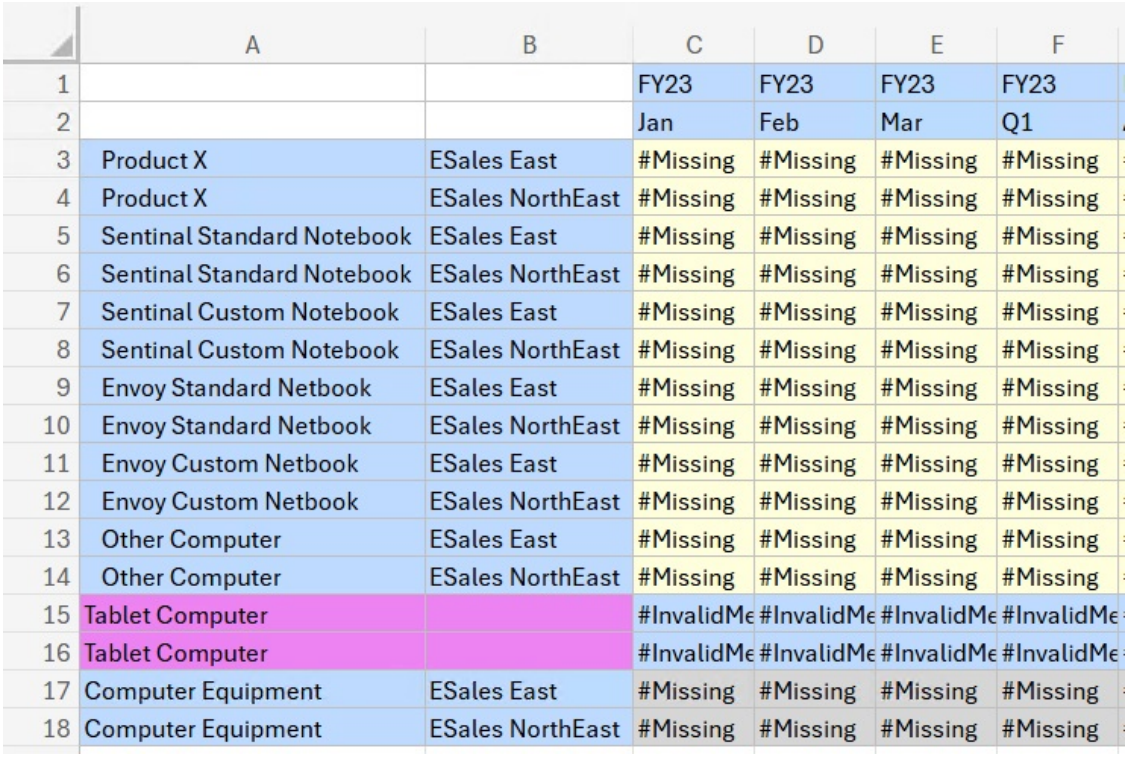


	A	B	C	D	E
1		Jan	Feb	Mar	Q1
2	7110: Advertising	187156	191410	177586	556152
3	Total Office Expenses	187156	191410	177586	556152
4	7640: Airfare	#Missing	#Missing	#Missing	#Missing
5	7650: Car Rental	#Missing	#Missing	#Missing	#Missing
6	7660: Shipping	26549	27707	25176	79432
7	7670: Accommodation	#Missing	#Missing	#Missing	#Missing
8	7690: Meals	#Missing	#Missing	#Missing	#Missing
9	7699: Miscellaneous Travel Expenses	108	108	36	252
10	Total T&E Expenses	26657	27815	25212	79684
11	Total Operating Expenses	213813	219225	202798	635836
12	7310: Existing Depreciation	35819	35819	35819	107457
13	Total Depreciation & Amortization	35819	35819	35819	107457
14	OpEx before Allocations	249632	255044	238617	743293

Example of Missing Member Name on Multi-Dimension Row

#InvalidMember is displayed on the flex form in Smart View when a row or column has multiple members and you miss entering a member on a member cell in that row or column. In the following example, there are two dimensions on the rows. You added two rows after row 14. The members from the Product dimension in Column A, rows 15 and 16, were typed correctly. But you did not type any entries in the same rows in Column B. Those cells are missing the member name from the Entity dimension. This is the result after performing a refresh.

Figure 8-4 Flex Form with Missing Member Names in Column B, Rows 15 and 16



	A	B	C	D	E	F
1			FY23	FY23	FY23	FY23
2			Jan	Feb	Mar	Q1
3	Product X	ESales East	#Missing	#Missing	#Missing	#Missing
4	Product X	ESales NorthEast	#Missing	#Missing	#Missing	#Missing
5	Sentinal Standard Notebook	ESales East	#Missing	#Missing	#Missing	#Missing
6	Sentinal Standard Notebook	ESales NorthEast	#Missing	#Missing	#Missing	#Missing
7	Sentinal Custom Notebook	ESales East	#Missing	#Missing	#Missing	#Missing
8	Sentinal Custom Notebook	ESales NorthEast	#Missing	#Missing	#Missing	#Missing
9	Envoy Standard Netbook	ESales East	#Missing	#Missing	#Missing	#Missing
10	Envoy Standard Netbook	ESales NorthEast	#Missing	#Missing	#Missing	#Missing
11	Envoy Custom Netbook	ESales East	#Missing	#Missing	#Missing	#Missing
12	Envoy Custom Netbook	ESales NorthEast	#Missing	#Missing	#Missing	#Missing
13	Other Computer	ESales East	#Missing	#Missing	#Missing	#Missing
14	Other Computer	ESales NorthEast	#Missing	#Missing	#Missing	#Missing
15	Tablet Computer		#InvalidMe	#InvalidMe	#InvalidMe	#InvalidMe
16	Tablet Computer		#InvalidMe	#InvalidMe	#InvalidMe	#InvalidMe
17	Computer Equipment	ESales East	#Missing	#Missing	#Missing	#Missing
18	Computer Equipment	ESales NorthEast	#Missing	#Missing	#Missing	#Missing

To correct this issue, add the correct members, "ESales East" and "ESales NorthEast". in Column B, rows 15 and 16, and then perform a refresh.

Example of Member Name Entered that is Outside of Form Definition

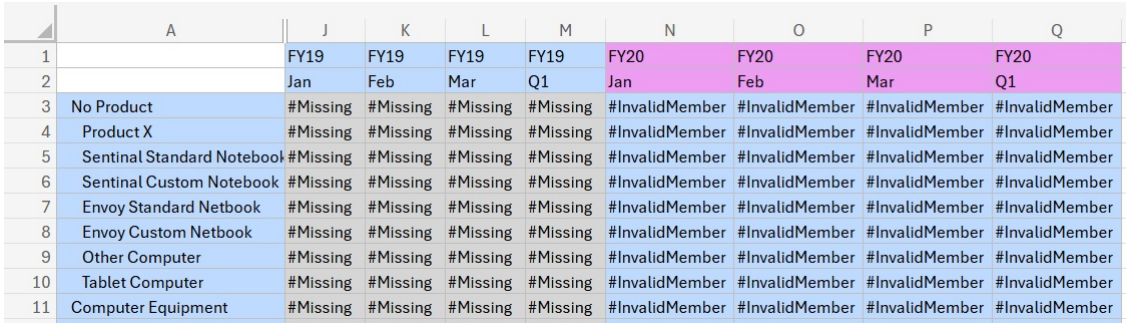
#Invalidmember is displayed on the flex form in Smart View when you enter a member that is beyond the form definition.

For example, suppose that in the form, the Year dimensions are limited to FY17, FY18, and FY19. But in the application outline, the dimension contains many more members, such as FY20, FY21, FY22, and FY23.

When designing a flex form, if the Service Administrator has selected the "Flex beyond form definition" option for the Year dimension, then you may add members that are outside of the form definition, such as FY20. If the "Flex beyond form definition" option is not selected, then adding a member that is outside of the form definition will result in invalid members, even though the members exist in the outline.

In the following case, the "Flex beyond form definition" option was not selected for the Year dimension on the column. The columns for FY17 and FY18 are hidden. You add four columns and enter FY20 in the first row, and Jan, Feb, Mar, and Q1 in the second row, and then refresh. Note below that columns N through O now contains invalid members.

Figure 8-5 "Flex beyond form definition" Is Not Selected and Member Is Outside of Form Definition



	A	J	K	L	M	N	O	P	Q
1		FY19	FY19	FY19	FY19	FY20	FY20	FY20	FY20
2		Jan	Feb	Mar	Q1	Jan	Feb	Mar	Q1
3	No Product	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
4	Product X	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
5	Sentinal Standard Notebook	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
6	Sentinal Custom Notebook	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
7	Envoy Standard Netbook	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
8	Envoy Custom Netbook	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
9	Other Computer	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
10	Tablet Computer	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember
11	Computer Equipment	#Missing	#Missing	#Missing	#Missing	#InvalidMember	#InvalidMember	#InvalidMember	#InvalidMember

To remedy this, your Service Administrator should select the **Flex beyond form definition** option for the Year dimension. With this option selected for the form, you may enter the members that are outside of the form definition, perform a refresh, and retain the members on the flex form.

Enabling the Invalid Member Option

Service Administrators: Enabling the new **Show invalid members for flex form** check box lets users easily see, understand, and correct any error they may have made in entering member names in flex forms.

To retain invalid members on a flex form, a Service Administrator performs these steps from the Cloud EPM web interface:

1. From the Navigator, under **Create and Manage**, select **Forms**.
2. Select an existing form to edit or, in the **Form and Ad Hoc Grid Management** page, click the **Actions** drop-down menu and select **Create Simple form**.
3. In the form definition page, under **Smart View Options** in the **Layout** tab, select the **Enable flex form for rows** and **Enable flex form for columns** check boxes, as you require. You may select one or both of these options.
4. Select the **Show invalid members for flex form** check box.

> **Tip**
>
> The **Show invalid members for flex form** check box is enabled only when **Enable flex form for rows** or **Enable flex form for columns**, or both, are selected, as described in the previous step.

5. **Optional:** For individual rows or columns, in **Dimension Properties**, enable the **Flex beyond form definition** option, as you require.
6. Save the form.

For more information on setting this option, see:

- *Administering FreeForm*
  - Designing Flex Forms
  - Setting Smart View Form Options
  - Setting Dimension Properties

- *Administering Planning*
  - Designing Flex Forms
  - Setting Smart View Form Options
  - Setting Dimension Properties

Retaining Formula, Label, and Comment Rows and Columns on Flex Forms

You can retain formula rows and columns on flex forms by enabling the "Show invalid members for flex form" option during form definition. When a Service Administrator enables this option, formula rows and columns are retained on the flex form after a refresh or a submit.

> **Note**
>
> Formula rows and columns are also referred to as *label* or *comment* rows and columns.

After a refresh or submit operation, all members and data on a formula row or column are highlighted using the same cell style as used for invalid members, described in Retaining Invalid Members on Flex Forms.

> **Note**
>
> Attempting to delete an entire row or column by using the **Delete** key to delete only the member cells of a row or column will result in invalid members in the member cells upon refresh. To delete entire rows or columns on a flex form, select the entire row or column, right-click, and then select **Delete** from the Excel context menu.

Enabling the **Show invalid members for flex form** option gives users the versatility of flex forms when working with forms containing formula rows and columns.

Retaining Modified Members on Flex Forms After POV or User Variable Change

To retain modified members on a flex form after a POV or user variable change, you enable **Flex Forms: Preserve Grid on POV and User Variable Changes** in the **Options** panel, **Members** tab.

If this option is not selected, any added rows or columns in the flex form will be removed upon a POV or user variable change.

To retain added members on a flex form after a POV or user variable change:

1. Follow the procedure in Member Options to launch the **Options** panel, **Members** tab.
2. Select the **Flex Forms: Preserve Grid on POV and User Variable Changes** check box.
3. Save your selection and close the **Options** panel.
   Use the procedure in Member Options to choose an option for saving your selection.
4. **Optional:** Add or delete members in the flex form, and click **Refresh**.
5. Perform these tasks as you require:
   - Change a POV member and click **Refresh**

- Change a user variable; the flex form refreshes automatically.

Your modified members are retained. You can now enter and submit data against the modified POV and user variables in any of the members in the flex form, including any newly-added members.

6. **Optional:** Change the POV or any user variable again and refresh, and then continue entering data against the updated POV and user variables.

See also:

- Working with Flex Forms in Smart View
- Member Options

Smart Push with Flex Forms

- Smart Push is supported on flex forms.
- On a filtered flex form, Smart Push does not honor the context of the selected form.

Unsupported Features on Flex Forms

The following form features are not supported for flex forms:

- Using Segment Properties: Hide, Read-only, Enable drop-down for dimensions (row dimension drop-down member selectors), Suppress Hierarchy

> **Note**
>
> After rows are rearranged or sorted, segment properties are not retained.

- Filtering data in columns
- Using formulas in rows or columns
- Using the **Member Name and Alias** option
- Using flex forms inside composite forms
- Enabling **Show Currency** for the Entity dimension.
- Data validation rules within forms are not supported when using flex forms. Instead, convert data validation rules to Groovy rules.

Flex forms are not supported for:

- Dashboards
- Smart Forms
- Task Manager extension

Working with Flex Forms in Smart View

With flex forms, you can rearrange row and column dimensions, and insert valid members or aliases from corresponding dimensions.

Perform a refresh prior to submitting data in the modified form in Smart View. Upon refresh, invalid members, comments, and empty rows or columns are removed and submitting of data is enabled.

To work with a flex form:

1. Connect to a data source.
2. In the Smart View Home panel, click a flex form name to open it.

   By default, when you click the flex form name, it opens as a flex form.

   Flex forms are indicated by the
   
   icon.

   You can choose to open the flex form as a simple form or ad hoc grid by right-clicking the flex form icon,
   
   , or the space after the flex form name, and selecting the **Open Form** or **Ad Hoc Analysis** option.
3. Modify the data as per your requirements.

   For example, some actions you may perform are:

   - Rearrange or move row and column members
   - Insert rows and columns
   - Delete rows and columns
   - Add members. You can add members using **Member Selection** (on the provider ribbon) or hand-typing member names.
   - Sort a range of members in a column using the **Sort & Filter** button on the Excel **Home** ribbon, or the **Sort** button on the Excel **Data** ribbon
   - Run a business rule

   > **Note**
   >
   > - Submitting of data is disabled when you edit row members.
   >
   >   Filtering is not considered editing; if you only add filters, you may still submit data.
   > - In the Smart View **Options** panel, **Formatting** tab, the **Repeat Member Labels** check box is required to be enabled for flex forms. You may attempt to clear the check box, but upon refresh, the check box will again be selected and the **Repeat Member Labels** option will be enabled.
   > - The operations you can perform on rows and columns depend on the selections made by your Service Administrator or form designer during form definition. To perform operations on rows, the **Enable flex form on rows** option must be selected. To perform actions on columns, the **Enable flex form on columns** option must be selected. These options are described in Setting Smart View Form Options in *Administering Planning*.
4. **Optional:** To retain added members on a flex form after a POV or user variable change, select the **Flex Forms: Preserve Grid on POV and User Variable Changes** check box in the **Options** panel, **Members** tab.

   For more information, see Retaining Modified Members on Flex Forms After POV or User Variable Change.

5. **Optional:** If your Service Administrator has enabled the **Show invalid members for flex form** option when designing the form, you may enter member names and then click **Refresh** to view and correct any invalid member names.

   For more information, see Retaining Invalid Members on Flex Forms.

6. **Optional:** To run a business rule, select a cell in the form. On the provider ribbon, click **Show Context Menu** and select the name of the business rule.

7. Click **Refresh**.

   On refresh, Smart View maintains modifications you have made to the form.

   If **Show invalid members for flex form** is enabled for the form, the invalid members are retained; if this option is not enabled, then the **Refresh** action removes invalid members.

   > **Note**
   >
   > Data can be submitted only after refreshing it. However, the modified form layout is not stored on the server; it is maintained only in the context of the current session.

8. To submit the changed data, click **Submit Data.**

   Submit Data is enabled only after refresh.

9. To revert to the original flex form layout, reopen the flex form.

   The modified form is not stored on the server; it is maintained only in the context of the current session. Reopening the flex form reverts the flex form layout to its original state.

Opening a Flex Form in Ad Hoc Mode and Submitting Data

You can open a flex form in ad hoc mode, just like any regular form, use ad hoc analysis to modify the grid layout, and submit data.

To open a flex form in ad hoc mode and submit data:

1. Connect to a data source.
2. In the Smart View panel, expand the tree list and locate the flex form to open in ad hoc mode.
3. Right-click the icon of the flex form,  , and select **Ad Hoc Analysis**.

   Alternatively, right-click the icon of the flex form,  , and select **Open Form**. Then, in the Smart View ribbon, click **Analyze**.
4. Modify data and grid layout per your requirements.
5. Click **Submit Data**.
6. Go back to the sheet with the flex form.
7. Click **Refresh**.

   The original layout and modified data appears in the flex form.

9

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 Fusion Cloud Enterprise Performance Management form.
- Formatting Ad Hoc Grids
  You can use either Smart View (cell styles) 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 and zoom out for a high level view.
- 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.
- Keeping and Removing Members from Ad Hoc Grids
  You can keep or remove members and their associated data from ad hoc grids.
- Inserting Attribute Dimensions
  When performing ad hoc analysis, you can insert attribute dimensions or members into a worksheet.
- Viewing Member Cell Information
  You can view detailed information about any member cell on the grid.
- Changing the Solve Order of Data Cells
  You can view detailed information about a data cell and change its solve order for the selected POV.
- Preserving Excel Formulas in Ad Hoc Operations
  You can associate Excel formulas and comments 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.
- Working with Comments and Unknown Members
  You can easily access and edit comments and unknown members in an ad hoc grid using the Comment Edit dialog that opens from the View Comments ribbon command.
- 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.
- Saving Ad Hoc Grids
  You can save ad hoc grids as forms.
- Working with Multiple-Grid Sheets
  In Smart View, you can retrieve multiple ad hoc grids on one sheet. The grids can all be connected either to the same data source or to different data sources.

- Smart View Behavior Options in Cloud EPM
  Your administrator can set options in the web interface that affect Smart View behavior.

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.

> **Note**
>
> Ad hoc operations are not supported on protected worksheets.

Starting Ad Hoc Analysis

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

To start an ad hoc analysis grid, use either of the following methods:

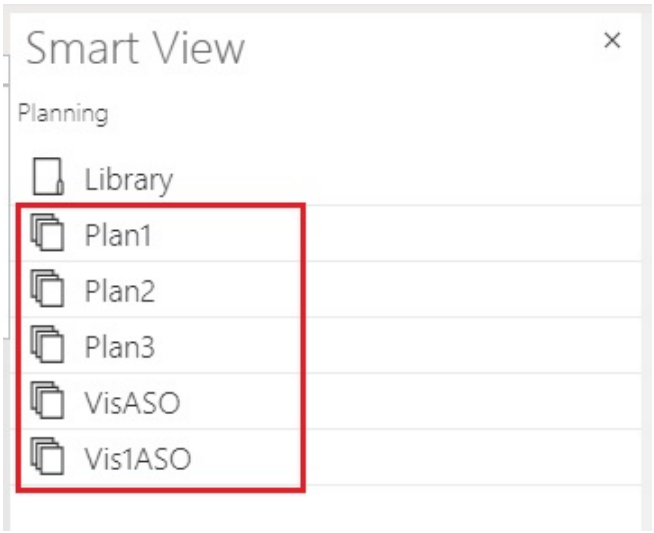
- Starting Ad Hoc Analysis from a Cube
- Starting Ad Hoc Analysis from a Cloud EPM Form

> **Note**
>
> When you start ad hoc analysis, cell styles are not enabled by default. See Using Smart View Formatting (Cell Styles) for information on the **Use Cell Styles** setting.

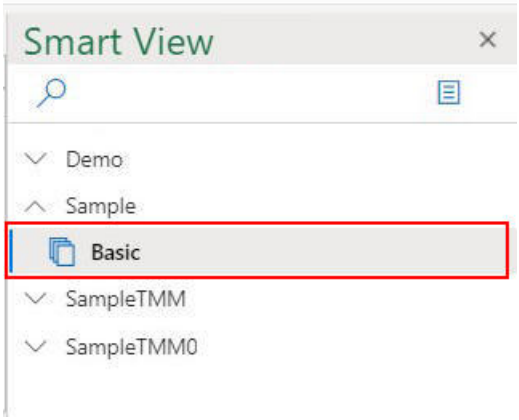
Starting Ad Hoc Analysis from a Cube

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

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



Similarly, in the following example for Oracle Essbase, the **Basic** cube is selected from the list.



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 a Cloud EPM Form

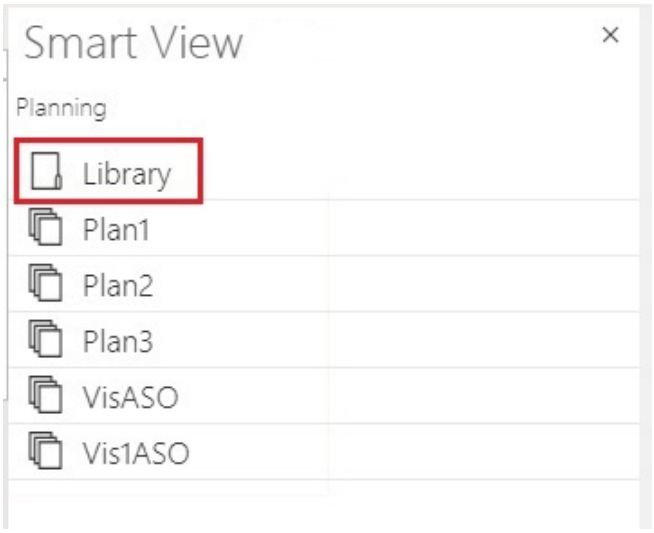
If you have been assigned the ad hoc user role by an administrator, you can perform ad hoc analysis on Cloud EPM forms that have been enabled for ad hoc by the administrator.

To start ad hoc analysis for a Cloud EPM form:

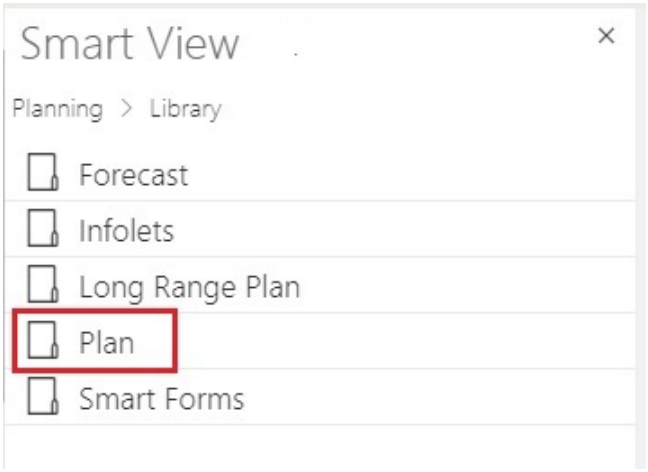
1. From the Smart View Home panel, select a Cloud EPM form.

   For example, in the following **Smart View** panel:

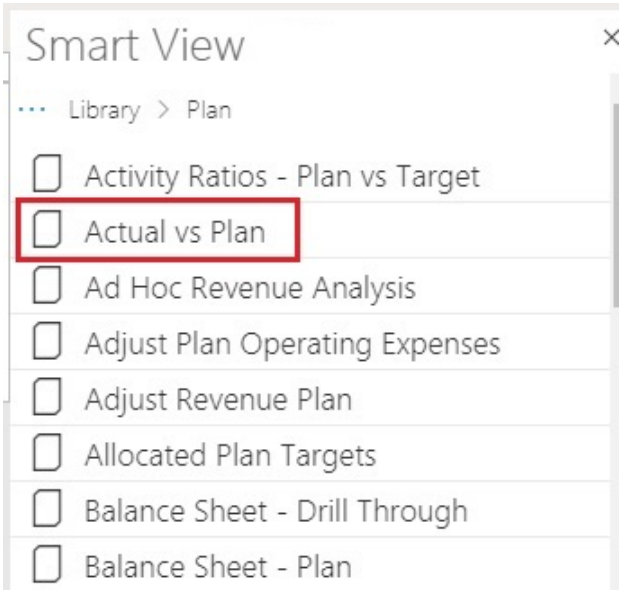
   a. Select **Library**.



b. Select **Plan** to display all the Cloud EPM forms saved under the **Plan** folder.



c. Select a Cloud EPM form; for example, you could select the **Actual vs Plan** Cloud EPM form.



When you select a Cloud EPM form, the data for that form is placed on the grid; however, it is not initially in ad hoc mode.

2. On the provider ribbon, in the **Ad Hoc** group, click **Analyze**

to open a second sheet that contains the ad hoc grid created from the form. The provider ad hoc ribbon also appears with various options to perform ad hoc analysis.

> **Tip**
>
> To open a form directly in ad hoc analysis mode, that is as an ad hoc grid, first select it, right-click on it, and then select the **Ad Hoc Analysis** option in the menu.

Formatting Ad Hoc Grids

You can use either Smart View (cell styles) or Excel to control grid formatting.

Related Topics

- Using Smart View Formatting (Cell Styles)
- Using Excel Formatting

Using Smart View Formatting (Cell Styles)

Smart View formatting, or *cell styles*, consists of formatting selections made in the **Formatting** tab in the Smart View **Options** panel. If you do not enable cell styles for ad hoc grids, then Excel formatting is applied (see Using Excel Formatting).

To set Smart View formatting options:

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

2. In the **Options** panel, select the **Formatting** tab.
3. In the **Formatting** tab, select the **Use Cell Styles** check box.
4. Click **Cell Styles** and set the desired cell styles and precedence order. For more information on setting cell styles and precedence order, see Cell Styles.

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, Smart View 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 in the **Formatting** tab in the **Options** panel. See Using Smart View Formatting (Cell Styles) for more information.

Zooming In and Out

Zoom in on members in the grid to display data for their children and descendants and zoom out for a high level view.

Related Topics

- Zooming In
  You can zoom in on members in the grid to display data for their children and descendants.
- Zooming Out
  You can zoom out to collapse the view to the next upper level or top level.
- Selecting Members to Display when Zooming
  You can set options to specify which members are retained and displayed as you zoom in and out.
- Zooming Operations in Cells that Contain Formulas

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 provider ad hoc ribbon, click the down arrow next to **Zoom In**.
3. From the **Zoom In** option, select the required 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.
> - You cannot zoom in on member formula cells when connected to an aggregate storage database.
> - In Native mode, any blank rows inserted in to an ad hoc grid will be removed when a **Zoom In** is performed.
>
>   Native mode refers to the **Smart View Ad Hoc Behavior** setting for the application. Administrators set this option in the Oracle Fusion Cloud Enterprise Performance Management web application. When the application you're connected to is running in Native mode, then the Smart View Ad Hoc Behavior option is set to Native.

Zooming Out

You can zoom out to collapse the view to the next upper level or top level.

To zoom out:

1. Select a member in the grid.
2. From the provider ad hoc ribbon, click the down arrow next to **Zoom Out**.
3. From the **Zoom Out** options, select the required option:
   - **Next Level** to zoom out to the next level of data
   - **Top Levels** to zoom out to the top level of data

> **Note**
>
> In Native mode, any blank rows inserted in to an ad hoc grid will be removed when a **Zoom Out** is performed.
>
> Native mode refers to the **Smart View Ad Hoc Behavior** setting for the application. Administrators set this option in the Oracle Fusion Cloud Enterprise Performance Management web application. When the application you're connected to is running in Native mode, then the Smart View Ad Hoc Behavior option is set to Native.

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. In the Smart View ribbon, click the **Options** button to launch the **Options** panel.
2. In the **Options** panel, select the **Members** tab.
3. Under **Member Retention**, select the required option:

- **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**.

Zooming Operations in Cells that Contain Formulas

Applies to: Oracle Essbase

If member or data cells are associated with formulas, you can propagate these formulas to the cells retrieved as a result of zooming in. For example, if member Qtr1 is associated with a formula, then the formula can be propagated to Jan, Feb, and Mar when you zoom in on Qtr1.

To propagate formulas:

1. From the Smart View ribbon, click **Options** to launch the **Options** panel.
2. In the **Options** panel, select the **Members** tab.
3. Under **Comments and Formulas**, ensure that **Preserve Formulas and Comments in Ad Hoc** is selected.
4. Select **Formula Fill**.

> **Note**
>
> - With the **Formula Fill** option enabled, some zoom operations may be time consuming. For example, a zoom in to the bottom level of a large hierarchy may take a long time to complete.
> - Though the **Formula Fill** option appears in **Members** tab, it applies to formulas in both member and data cells.

5. Open an ad hoc grid and select a member or data cell with formula.
6. From the Essbase ribbon, click the down arrow next to **Zoom In**, and then select the level you want to zoom in.

   The formula is propagated to the cells retrieved as a result of zooming in.

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
  You can pivot a dimension or members between rows and columns.

- Pivoting Dimensions or Members 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. When you pivot a member, the other members in its dimension are also pivoted.
- Rearranging Dimensions on the Grid
  You can rearrange dimensions on the grid by moving dimensions up or down, and to the right or the left.

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, Smart View 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 provider ad hoc ribbon, in the **Analysis** section, click the arrow under **Pivot**, and then select **Pivot**.
3. Observe the change in the grid.
   - 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 or Members 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. When you pivot a member, 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 provider ad hoc ribbon, in the **Analysis** section, click the arrow under **Pivot**, and then select **Pivot to POV**.

3. Open the **POV** panel. To do so, from the provider ad hoc ribbon, in the **Data** section, click **POV**.

   The dimension is displayed in the **POV** panel.

Pivoting a Dimension from the POV to the Grid

To pivot a dimension from the POV to the grid:

1. Open the **POV** panel.

   From the provider ad hoc ribbon, in the **Data** section, click **POV**.

2. To pivot a dimension from the POV to a column in the grid:

   In the **POV** panel, click the ellipsis button

   to the right of the dimension, and then select **Pivot to Column**.

3. To pivot a dimension from the POV to a row in the grid:

   In the **POV** panel, click the ellipsis button

   to the right of the dimension, and then select **Pivot to Row**.

Pivoting a Member from the POV to the Grid

To pivot a member from the POV to the grid:

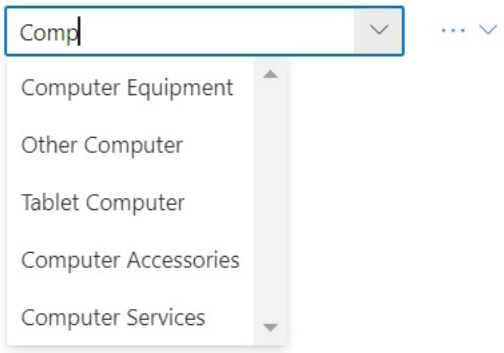
1. Open the **POV** panel.

   From the provider ad hoc ribbon, in the **Data** section, click **POV**.

2. Ensure that you have added members to the drop-down list by completing the procedure in Selecting Members from a Point of View Dimension.

3. Click the drop-down arrow for the dimension to view the list of available members, and select a member from the list.

   For long member lists, you can filter members by typing part of the member name in the dimension text box. For example, using the Vision Product dimension, begin typing Computer. The drop-down list filters on members with Computer in the name:

4. To pivot the selected member from the POV to a column in the grid:

   In the **POV** panel, click the ellipsis button

   to the right of the dimension, and then select **Pivot to Column**.

5. To pivot the selected member from the POV to a row in the grid:

In the **POV** panel, click the ellipsis button

to the right of the dimension, and then select **Pivot to Row**.

Guidelines on Pivoting Dimensions and Members

Consider the following guidelines while pivoting:

- You can leave any number of dimensions in the POV.
- After pivoting the last dimension from the POV to the grid, the POV panel is hidden. You can always reopen the POV panel to display it again.
- 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

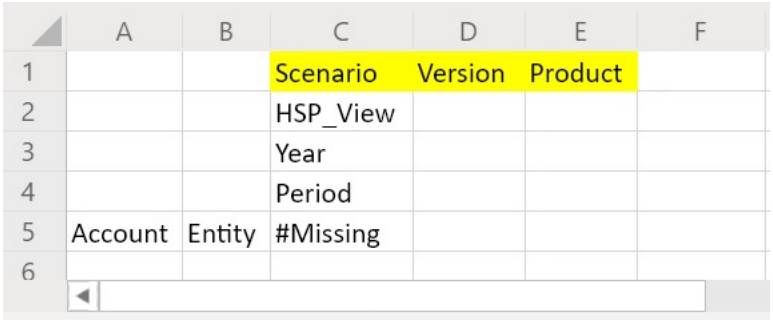
You can rearrange dimensions on the grid by moving dimensions up or down, and to the right or the left.

To rearrange the dimensions on an ad hoc grid:

1. Select a dimension or member on the grid.
2. From the provider ad hoc ribbon, in the **Analysis** section, click the arrow under **Pivot**.
3. Select one of the following options:
   - **Move Up**
   - **Move Down**
   - **Move Left**
   - **Move Right**

   If you are working with Standard mode applications, the POV dimensions are, by default, displayed on the sheet with the ad hoc grid. In Figure 1, the dimensions shown in yellow are the POV dimensions. You can pivot POV dimensions to the grid, or use the **Move Left** option to move them to the left within the POV dimension row. However, the **Move Right** option is not supported for in-grid POV dimensions.

Figure 9-1 Ad Hoc Grid Showing POV Dimensions In Grid



Keeping and Removing Members from Ad Hoc Grids

You can keep or remove members and their associated data from ad hoc grids.

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 provider ad hoc ribbon, in the **Analysis** section, select **Keep Only**.

   All other members in the grid are removed.

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 provider ad hoc ribbon, in the **Analysis** section, select **Remove Only**.

   All selected members in the grid are removed.

> **Note**
>
> In Native mode, any blank rows inserted in to an ad hoc grid will be removed when a **Remove Only** or **Keep Only** is performed.
>
> Native mode refers to the **Smart View Ad Hoc Behavior** setting for the application. Administrators set this option in the Cloud EPM web. When the application you're connected to is running in Native mode, then the Smart View Ad Hoc Behavior option is set to Native.

Examples on Keep and Remove

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 9-2 Grid with Market Members in Column A, Year Members in Column B

	A	B	C	D
1			Product	Scenario
2			Measures	
3	New York	Jan	8722	
4	Florida	Jan	336	
5	Connecticut	Jan	321	
6	New Hampshire	Jan	44	
7	West	Feb	2394	
8	South	Year	13238	
9	Central	Year	38262	
10	Market	Year	213522	
11				

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 9-3 Grid with Year Members in Column A, Market Members in Column B

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	
7	Jan	West	2339	
8	Jan	South	997	
9	Jan	Central	2956	
10	Jan	Market	16234	
11	Feb	New York	99955	
12	Feb	Florida	361	
13	Feb	Connecticut	309	
14	Feb	New Hampshire	74	
15	Feb	West	2394	
16	Feb	South	1046	
17	Feb	Central	3063	
18	Feb	Market	107700	
19	Year	New York	116202	
20	Year	Florida	5029	
21	Year	Connecticut	3093	
22	Year	New Hampshire	1125	
23	Year	West	29861	
24	Year	South	13238	
25	Year	Central	38262	
26	Year	Market	213522	

Now select a Jan cell and click **Keep Only**. The resulting layout shows only the Market dimension members grouped under Jan.

Figure 9-4 Grid with Only Jan Group Members

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	
7	Jan	West	2339	
8	Jan	South	997	
9	Jan	Central	2956	
10	Jan	Market	16234	

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 9-5 Members Selected for Keep Only

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	
7	Jan	West	2339	
8	Jan	South	997	
9	Jan	Central	2956	
10	Jan	Market	16234	

And then click **Keep Only**.

Figure 9-6 Grid with Only Jan Group Members New York, Florida, Connecticut, and New Hampshire

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	

You can achieve the result in another way. Select the West, South and Central members, and the Market dimension.

Figure 9-7 Members Selected for Remove Only

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	
7	Jan	West	2339	
8	Jan	South	997	
9	Jan	Central	2956	
10	Jan	Market	16234	

And then click **Remove Only**.

Figure 9-8 Grid with Only Jan Group Members New York, Florida, Connecticut, and New Hampshire

	A	B	C	D
1			Product	Scenario
2			Measures	
3	Jan	New York	8722	
4	Jan	Florida	336	
5	Jan	Connecticut	321	
6	Jan	New Hampshire	44	

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

Inserting Attribute Dimensions

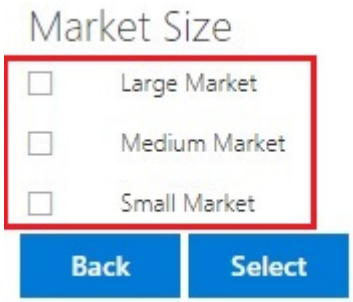
When performing ad hoc analysis, you can insert attribute dimensions or members into a worksheet.

To insert attribute dimensions or members:

1. Open an ad hoc grid.
2. From the provider ad hoc ribbon, in the **Analysis** section, click **Insert Attribute**.
3. In the **Insert Attribute** dialog box, select the attribute dimensions to add to the sheet.
4. **Optional:** To further define an attribute member, click ... next to the attribute to open the **Member Selector** and select the required member.

For example, click ... next to Market Size.

Select *Large Market*, *Medium Market*, or *Small Market*.



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

Guidelines for Inserting Attribute Dimensions

When inserting attributes, consider 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 you are prompted to refresh manually.
- 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 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.
- An attribute dimension must be present in the grid before it can be deleted. For more information, see Pivoting Dimensions or Members between the Grid and the POV.

Viewing Member Cell Information

You can view detailed information about any member cell on the grid.

The information displayed depends on the data source type to which you are connected.

> **Note**
>
> - For Oracle Essbase, in addition to member cells, you can also view cell information for data cells and change their solve order. For more information, see Changing the Solve Order of Data Cells.
> - For other data providers, you can view information only for a member cell.

To view cell information:

1. Select a member cell in the grid.
2. From the provider ad hoc ribbon or Essbase ribbon, in the **Analysis** section, select **Cell Information**

   .
3. View the information displayed in 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, parent member name, and so on. These properties may vary based on the selected member and dimension type.
   - **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)
4. Click **OK** to return to the grid.

Changing the Solve Order of Data Cells

You can view detailed information about a data cell and change its solve order for the selected POV.

Applies to: Oracle Essbase

You can view information about a data cell, such as its POV and consolidation property. You can also view the solve order of the data cell at the member intersection or POV that you selected.

Solve order is a value that represents the order or priority of a member when a calculation is performed. You can view and change the solve order by editing it in the **Data Cell Information** dialog box. The selected data cell must contain a dynamic member in the POV.

To view data cell information:

1. In an ad hoc grid, select a data cell.

2. From the Essbase ribbon, in the **Analysis** section, select **Cell Information** 
.
3. In the **Data Cell Information** dialog, view the following information:
   - The member in POV for the selected data cell. If there are multiple POV intersections, then they are listed in separate rows.
   - The current solve order. You can change this to get different results.
   - The operation calculation type. A detailed description of the current calculation result is displayed in the **Result** section.
4. To change the solve order value for a member in the POV, type a new value in the **Solve Order** field.

> **Note**
>
> Valid solve order values are between 0 and 127. If you enter a value above 127, you will be prompted with an error message to enter a value between 0 to 127. Note that members with a solve order of zero, 0, will not be listed in the dialog.

5. Click **OK** to commit all solve order changes.

Preserving Excel Formulas in Ad Hoc Operations

You can associate Excel formulas and comments 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 and comments in ad hoc operations:

1. From the Smart View ribbon, in the **General** section, click **Options**.
2. Select the **Member** tab, then scroll down to **Comments and Formula**, and then do one of the following:
   - To preserve formulas and comments in ad hoc grids, select the **Preserve Formulas and Comments in Ad Hoc** check box.
   - To disable preservation of formulas and comments, clear the **Preserve Formulas and Comments in Ad Hoc** check box. Do this only if you do not need to preserve formulas and comments, and you want faster execution of queries.
   - To preserve comments and unknown members in ad hoc grids, select the **Preserve Formulas and Comments in Ad Hoc** and **Preserve Comments and Unknown Members** check boxes. The **Preserve Formulas and Comments in Ad Hoc** check box must be selected first to enable the **Preserve Comments and Unknown Members** check box
   - To disable preservation of comments and unknown members, clear **Preserve Comments and Unknown Members**. Do this only if you do not need to preserve comments and unknown members, and you want faster execution of queries.

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

Working with Comments and Unknown Members

You can easily access and edit comments and unknown members in an ad hoc grid using the Comment Edit dialog that opens from the View Comments ribbon command.

Related Topics

- About Comments and Unknown Members
  Set options to highlight comments and unknown members on an ad hoc sheet, then use the Comment Edit dialog to modify or delete comments and unknown members as you require.
- Enabling Comment Display in the Sheet
  You can set options in Smart View to detect comments and unknown members on an ad hoc sheet.
- Displaying the Comment Edit Dialog on Refresh
  You can configure an option to display the Comment Edit dialog each time you refresh the sheet.
- Viewing Comments in the Sheet
  You can view comments in an ad hoc sheet.
- Editing and Deleting Comments and Unknown Members
  You can edit comments and unknown members using the Comment Edit dialog.

About Comments and Unknown Members

Set options to highlight comments and unknown members on an ad hoc sheet, then use the Comment Edit dialog to modify or delete comments and unknown members as you require.

When you are connected to a provider, you can enable options in Smart View that allow you to quickly detect:

- Unknown members on a grid
- Text typed outside the grid; for example, your own notes on a sheet

In Smart View, cells containing these types of text are referred to as *comments*.

You can set options in Smart View that allow you quickly and easily spot comment cells, including invalid, or unknown, members in the grid or pertinent notes you may have made on a sheet outside of the grid.

For example, in the Vision database, a member named "Total Entities" is renamed "Total Entity." Smart View tracks this change and shows it to you in the sheet if you define a cell style to call out comments. Then, you can quickly note the change and correct it either directly in the grid or by clicking **View Comments** in the Smart View ribbon and modifying the cell in the **Comment Edit** dialog.

To call out comments on an ad hoc sheet, open an ad hoc grid and in the **Options** panel, **Formatting** tab:

- Select the **Use Cell Styles** check box
- Set a cell style for Comments

You can then easily identify comment cells on the ad hoc sheet, and further select and work with them in the **Comment Edit** dialog box.

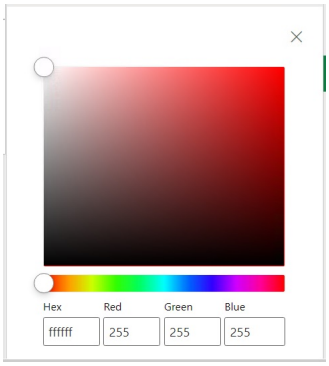
You can also select the **Always show on refresh** check box in the **Comment Edit** dialog box to launch it on each refresh.

Enabling Comment Display in the Sheet

You can set options in Smart View to detect comments and unknown members on an ad hoc sheet.

To enable comment display in an ad hoc sheet:

1. In the **Options** panel, perform these tasks:
   a. In **Members** tab, select the **Preserve Formulas and Comments in Ad Hoc** and **Preserve Comments and Unknown Members** check boxes.
   b. In the **Formatting** tab, select the **Use Cell Styles** check box.
   c. Click the **Cell Styles** button, expand **Miscellaneous Styles**, and then click on **Comment**. Drag the color controls (the circles in the top left corner of each color block) till you arrive at the color you want.



2. Click **X** in the top right corner to close the **Options** panel.

   You are now ready for the steps in Viewing Comments in the Sheet.

   Optionally, to view the **Comment Edit** dialog with every refresh, complete the steps in Displaying the Comment Edit Dialog on Refresh.

Displaying the Comment Edit Dialog on Refresh

You can configure an option to display the Comment Edit dialog each time you refresh the sheet.

> **Note**
>
> This procedure is optional.

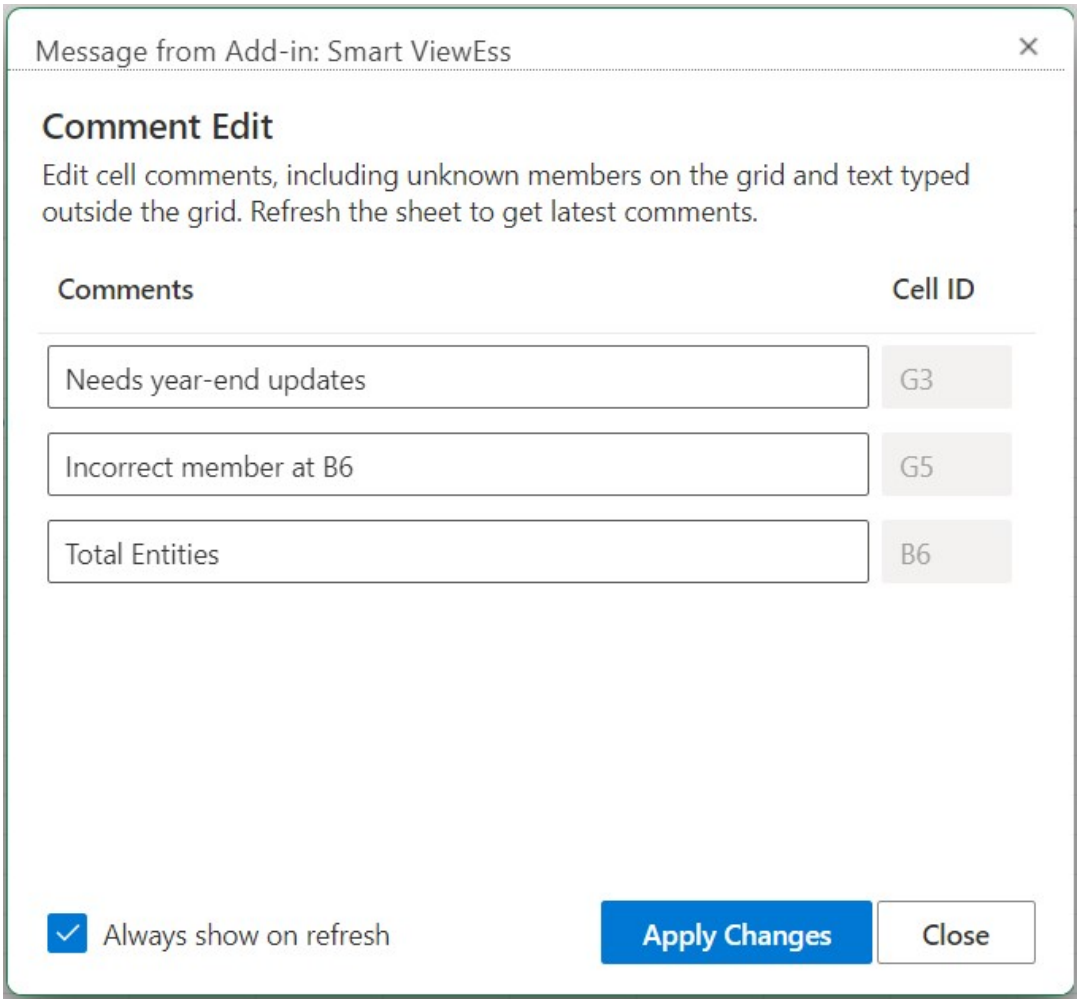
To enable comment display in the sheet upon refresh:

1. Place an ad hoc grid on the sheet.
2. From the provider ad hoc ribbon in the **Data** section:
   - For an Oracle Fusion Cloud Enterprise Performance Management provider, click **More** and then click **View Comments**.

- For an Oracle Essbase provider, click **View Comments** in the Essbase ribbon.

3. In the **Comment Edit** dialog, select the **Always show on refresh** check box.

Figure 9-9 Comment Edit Dialog



4. Click **Apply Changes**.

   The **Comment Edit** dialog will display each time you refresh the grid.

   The **Always show on refresh** check box applies not just for the current worksheet but for any new worksheets you open subsequently. You do not have to set it on a per-sheet basis.

5. **Optional:** To disable the **Comment Edit** dialog display on refresh, clear the **Always show on refresh** check box.

Viewing Comments in the Sheet

You can view comments in an ad hoc sheet.

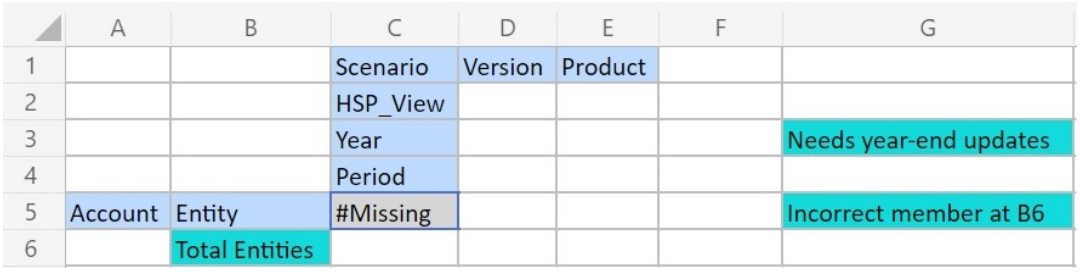
To view comment cells in an ad hoc sheet:

1. Be sure to complete the steps in Enabling Comment Display in the Sheet
2. Start an ad hoc grid or open a workbook containing a grid and click **Refresh**.

3. On the sheet, note the cells containing comments and unknown members.

   In the example shown below, cell B6 is an unknown member and Smart View marked the cell as a comment. The member name was probably changed in the underlying cube. The comment style indicates to us that this member needs attention.

Figure 9-10 Grid Showing Cells Marked with Comment Style



	A	B	C	D	E	F	G
1			Scenario	Version	Product		
2			HSP_View				
3			Year				Needs year-end updates
4			Period				
5	Account	Entity	#Missing				Incorrect member at B6
6		Total Entities					

   Additionally, a comment in column G notes that the member name is incorrect (G5). This comment is a note someone made outside of the grid and confirms to us that the member name has been changed in the cube and that the member needs to be manually updated in the grid. Another comment outside of the grid (G3), provides general instructions about the grid.

4. Continue with Editing and Deleting Comments and Unknown Members.

Editing and Deleting Comments and Unknown Members

You can edit comments and unknown members using the Comment Edit dialog.

Before you begin, complete the steps in Enabling Comment Display in the Sheet.

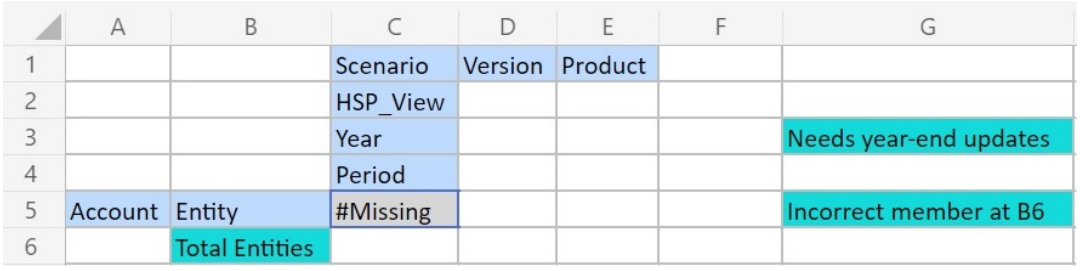
> **Note**
>
> The procedure in this topic shows you how to edit comments on an ad hoc sheet using the **View Comments** command and the **Comment Edit** dialog box in Smart View. You can also edit comments directly in the grid, without using the Smart View interface elements in this topic.

To edit and delete comments on an ad hoc grid:

1. Open an ad hoc grid containing comments, and click **Refresh**.

   In the example shown below, the grid displays some comments in the sheet.

Figure 9-11 Grid Showing Cells Marked with Comment Style



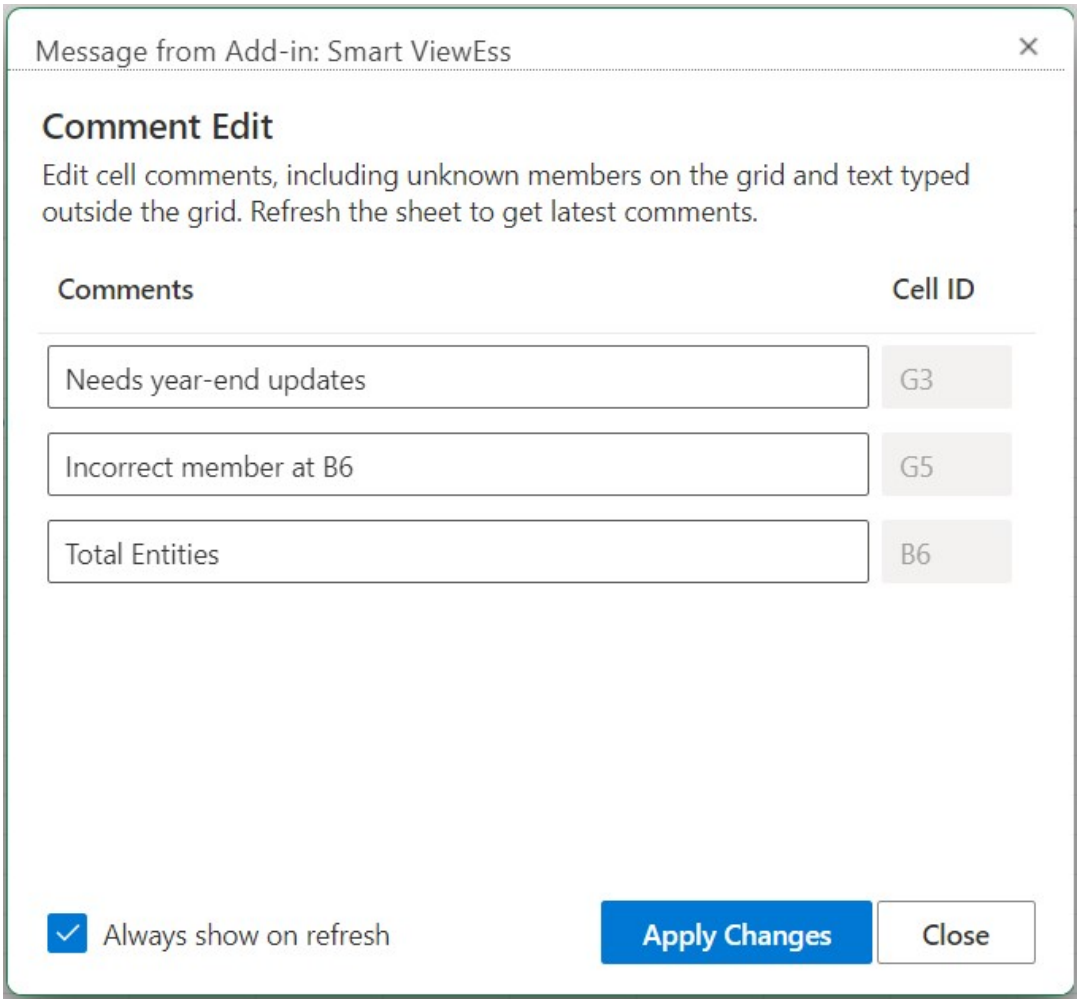
	A	B	C	D	E	F	G
1			Scenario	Version	Product		
2			HSP_View				
3			Year				Needs year-end updates
4			Period				
5	Account	Entity	#Missing				Incorrect member at B6
6		Total Entities					

2. From the provider ad hoc ribbon in the **Data** section, click **More** and then click **View Comments**.

   The **Comment Edit** dialog box is launched.

   Based on the grid in the above example, the **Comment Edit** dialog shows the comments present in the sheet which can be edited.

Figure 9-12 Comment Edit Dialog



3. To edit the text in a comment cell, in the **Comment Edit** dialog, click in the comment cell text box to edit; and then modify the text as required.

   Using the example **Comment Edit** dialog, click in the "Total Entities" comment cell text box, and then change "Total Entities" to "Total Entity".

4. Click **Apply Changes** and note the change in the grid.

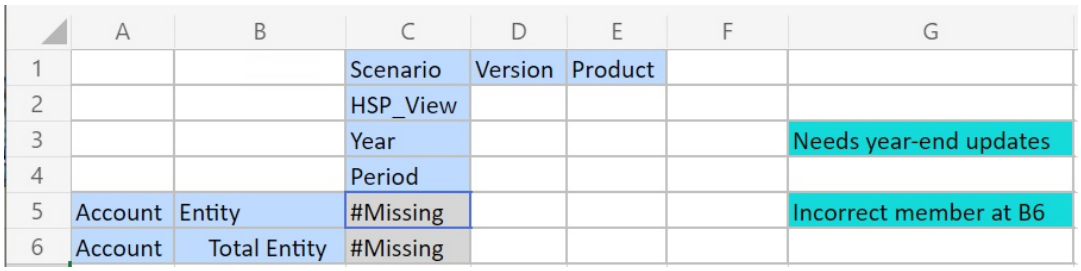
   Cells that were edited are now marked in the dirty cell style.

   In the example grid, after clicking **Apply Changes**, cell B6 would now be a dirty cell and would display the dirty cell style until the sheet is refreshed.

5. Click **Refresh**; the dirty cell style is cleared in the cells you edited and the appropriate cell style is applied.

   In the example grid, the result of the refresh is shown in Figure 3, where cell B6 displays the appropriate cell style.

Figure 9-13 Grid After Refresh, Comment Style in Cell B6 Is Cleared; Member In Sync with Cube



	A	B	C	D	E	F	G
1			Scenario	Version	Product		
2			HSP_View				
3			Year				Needs year-end updates
4			Period				
5	Account	Entity	#Missing				Incorrect member at B6
6	Account	Total Entity	#Missing				

Note that the comments outside the grid are still displayed in comment style.

6. To delete comments:
   a. Launch the **Comment Edit** dialog, click in the comment cell text box to highlight the editable text; and press the **Delete** key.

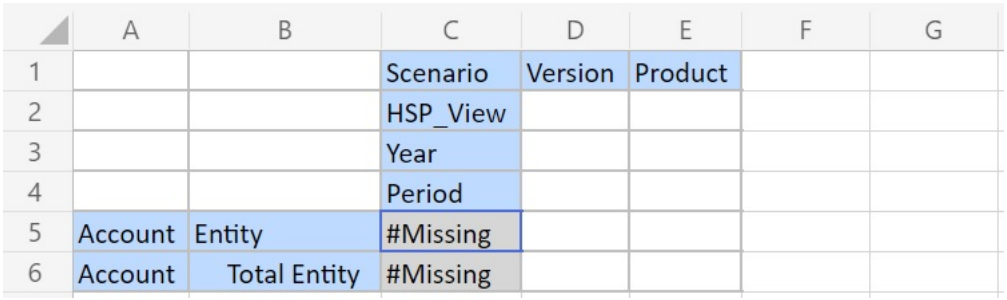
      Based on the example **Comment Edit** dialog in Figure 2, click in the comment cell text box for cell G3, highlight the text, and press the **Delete** key to remove the comment. Repeat for cell G5.

   b. Click **Apply Changes** in the **Comment Edit** dialog to return to the ad hoc grid sheet.

   c. Click **Refresh**.

      Based on the example grid in Figure 3, after deleting the comments in cells G3 and G5, there are no comments left on the grid, as shown in Figure 4.

Figure 9-14 Grid After Refresh, Comment and Cell Style from Cells G3 and G5 are Cleared



	A	B	C	D	E	F	G
1			Scenario	Version	Product		
2			HSP_View				
3			Year				
4			Period				
5	Account	Entity	#Missing				
6	Account	Total Entity	#Missing				

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 individual sheets. Each sheet tab is named according to the dimensions and members of the report it contains.

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

To cascade a report from an ad hoc grid:

1. Open an ad hoc grid on the worksheet.
2. From the provider ad hoc ribbon in the **Analysis** section, 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.

Saving Ad Hoc Grids

You can save ad hoc grids as forms.

To save an ad hoc grid as a form:

1. Open the ad hoc grid.
2. With the ad hoc grid active, from the provider ad hoc ribbon in the **Analysis** section, click **Save Ad Hoc Grid**.

   Saving ad hoc grids as forms is not supported for grids containing attributes.
3. 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.
4. Click **OK**.

   The saved grid is displayed in the Smart View Home panel tree list in the selected location.

Working with Multiple-Grid Sheets

In Smart View, you can retrieve multiple ad hoc grids on one sheet. The grids can all be connected either to the same data source or to different data sources.

Related Topics

- About Multiple Ad Hoc Grids on a Sheet
  When connected to supported Smart View data sources, you can create multiple grids on one sheet.
- Creating Multiple-Grid Sheets
  You can create a multiple-grid sheet by placing ad hoc grids from the same data source or different data sources.
- Renaming Grid Ranges
  You can rename grid ranges in multiple-grid sheets to identify them using a friendly and meaningful name.

- POV Behavior on Multiple-Grid Sheets

About Multiple Ad Hoc Grids on a Sheet

When connected to supported Smart View data sources, you can create multiple grids on one sheet.

These grids can be connected to the same data source or to different data sources. For example, one grid can be connected to Planning and another can be connected to Tax Reporting. They can also be sourced from cubes. You can retrieve data in these grids and shift them on the sheet.

> **Note**
>
> **Administrators:** To enable multiple-grid ad hoc for Smart View users, set the **Smart View Ad Hoc Behavior** option to **Standard** in the service application settings. See the administration documentation for your service for more information.

Guidelines for Working with Multiple-Grid Sheets

Note the following guidelines while working with sheets that contain multiple ad hoc grids:

- While inserting multiple ad hoc grids, always insert them on a new sheet which does not have any previous grid in it. If you have already opened a form or an ad hoc grid on a sheet and then select a cell range for adding another grid on the same sheet, a message prompts you stating, *"Multiple grids cannot be added to a single-grid sheets. Add a new sheet to add multiple grids"*.
- When working with multiple ad hoc grids, select at least one cell within a grid before performing any grid-specific operation. This helps Smart View identify the grid on which you want to take the action. If your selection is on a cell outside the grid, a message prompts you stating, *"Select at least one cell in the grid on which you want to perform this operation"*.
- When you connect to multiple data sources for placing multiple ad hoc grids in the same workbook, a separate Smart View ribbon is displayed for each connection.

  For example, if you are connected to Planning and Tax Reporting in the same workbook, you may see two Smart View ribbons, say *Smart View Planning* and *Smart View Tax Reporting*, based on the naming set by your service administrator for easy identification.

  Similarly, when you launch the Home panel from the respective connections, you can see two different Home panels stacked in the right pane.
- While performing any grid-specific operations in a multiple-grid sheet with multiple connections, ensure that you use the commands from the appropriate Smart View ribbon, provider and provider ad hoc ribbon, and Home panel that corresponds to the data source connected to the grid.

  For example, you are working on a sheet with Grid 1 connected to Planning and Grid 2 connected to Tax Reporting. To perform a Zoom In operation on Grid 1, use the **Zoom In** option on the Planning Ad Hoc ribbon. Similarly, to submit data in Grid 2, use the **Submit** option on the Smart View ribbon for Tax Reporting. If you use the **Submit** option from the Smart View ribbon linked to Planning, data in Grid 2 is not submitted.
- You can submit data for only one grid at a time in a multiple-grid sheet.

If you try to submit data for more than one grid at a time—that is, if you have selected cell ranges in more than one grid—the first range returned by Excel is used to determine the selected grid and the data on only that grid is submitted.

- You can refresh grid data in a sheet for one connection at a time. All grids belonging to the same connection are refreshed at the same time.

  For example, you are working on a sheet with Grid 1 and Grid 2 connected to Planning and Grid 3 connected to Tax Reporting. If you use the **Refresh** option on the Smart View ribbon for Tax Reporting, only Grid 3 is refreshed. To refresh Grid 1 and 2, use the **Refresh** option on the Smart View ribbon for Planning. Since both grids belong to the same connection, that is Planning, they are refreshed in a single operation.

  For more information, see Refreshing Data.

- When you zoom in on a grid and it expands to display data on more rows and columns, the placement of the other grids is automatically adjusted such that the expanded grid does not overlap the contents of the other grids on the sheet.

  For example, if you have two grids one below the other separated by two blank rows of space and you zoom in on the top grid, the bottom grid is pushed down in the sheet, and you can scroll down till the top grid ends to view the other grid.

- While viewing sheet information for a multiple-grid sheet, the **Sheet Info** dialog box displays a separate **Connection** section for each grid present on the sheet. For example, Connection (Grid 1), Connection (Grid 2), and so on.

  – If all the grids are connected to the same connection, then you can view their details such as Server, Application, URL, Provider, Alias Table, and Associated Range in their respective **Connection** section.

  – If any of the grids are connected to a different connection than the one from which the **Sheet Info** dialog box is launched, you can see only limited details such as Associated Range and an Information message indicating that this grid is associated with a different connection.
  For example, you are working on a sheet with Grid 1 and Grid 2 connected to Planning and Grid 3 connected to Tax Reporting. If you launch the **Sheet Info** dialog box using the **Sheet Info** option on the Smart View ribbon for Tax Reporting, you can see full details for Grid 3, including server, application, URL, provider and so on. However, for Grid 1 and 2, you only see the associated range name and an informational message stating *"The grid is associated with a different connection"*. To view the sheet information for Grid 1 and 2, use the **Sheet Info** option on the Smart View ribbon for Planning.

  For more information, see Sheet Information.

- The operations that are not supported in a multiple-grid sheet appear disabled on the provider ribbon.

- Smart View does not support mixing Admin Extension grids and ad hoc analysis grids on a single sheet

Video

Your Goal	Watch This Video
Learn about using multiple ad hoc grids in a worksheet in Smart View (Windows). Many of the concepts shown can be applied to Smart View (Mac and Browser).	 Setting Up Multiple Ad Hoc Grids in Smart View in Oracle Planning and Budgeting Cloud

The video references Planning as the data source, but the functionality shown is common to all Oracle Fusion Cloud Enterprise Performance Management providers.

Creating Multiple-Grid Sheets

You can create a multiple-grid sheet by placing ad hoc grids from the same data source or different data sources.

For placing multiple grids from multiple data source connections, ensure that your service administrator has deployed the respective manifests for connecting to the required data sources. You should be able to see multiple Smart View ribbons for respective data sources, for example *Smart View Planning* and *Smart View Tax Reporting*, based on the naming set by your service administrator.

To create a multiple-grid sheet:

1. Open a new sheet.

   Ensure that the sheet is blank and does not contain any existing data.
2. Select a range of cells from any location in the sheet.

   You must select a range of cells, instead of only one cell.
3. From the Smart View Home panel, perform an action:
   - Select a cube.
   - Select a form, right-click on it, and then select **Ad Hoc Analysis**.
4. Select **Yes** in the prompt asking to change the sheet to support multiple grids.

   The ad hoc grid is added in the position of the selected range.
5. To add another grid from the same data source on the sheet:
   a. Select a different range of cells.
   b. From the Smart View Home panel, select a cube, or select a form, right-click on it, and then select **Ad Hoc Analysis**.

      The ad hoc grid is added in the position of the selected range.
6. To add a grid from another data source on the same sheet:
   a. Select a range of blank cells.
   b. Open the Smart View ribbon of the other data source and click **Home** to open the Smart View Home panel related to that data source.

      The second Smart View Home panel opens in a separate tab below the already open Smart View Home panel belonging to the first data source.
   c. From the Smart View Home panel, select a cube, or select a form, right-click on it, and then select **Ad Hoc Analysis**.

      The ad hoc grid is added in the position of the selected range.

Renaming Grid Ranges

You can rename grid ranges in multiple-grid sheets to identify them using a friendly and meaningful name.

When you place ranges on a multiple-grid sheet, Excel assigns each range a name by default. The strings used in the name ranges may not be particularly user friendly. For example, a range based on the Vision Plan1 cube might look like this: Vision_Plan1_88CA3264. A more user-

friendly name, for example Business Drivers, helps users identify and understand the ad hoc grids in the multiple-grid sheet.

Using Smart View's **Rename Grid Range** option, you can rename the grid ranges while retaining their metadata and connection.

Related Topics:

- Renaming Grids on a Multiple-Grid Sheet
- Guidelines for Renaming Grids on a Multiple-Grid Sheet

Renaming Grids on a Multiple-Grid Sheet

To rename grids in a multiple-grid sheet:

1. In the multiple-grid sheet, select any cell in the grid that you want to rename.
2. From the provider ad hoc ribbon, click the down arrow next to **More** and select **Rename Grid Range**.
3. Review the grid's current name and enter a new name.
4. Click **OK**.
5. To view the new name, you can check the following:
    - **Sheet Information:** In the **Sheet Information** dialog, the new name appears in the **Associated Range** field.
    - **Name Box** At the top of the sheet, click the down arrow in the Name Box next to the Formula Bar. The new grid name appears in the list along with the cell ranges of the grid.

Guidelines for Renaming Grids on a Multiple-Grid Sheet

While renaming the grids, consider the following guidelines:

- Only alphanumeric characters are allowed in grid names. Special characters are not allowed.
- The name cannot start with a number.
- The name must be limited to 254 characters.
- The name must be unique for each grid. Multiple grids cannot have the same name. For example, grids having names as *Sales* and *SALES* are not considered unique, and so not allowed.
- Only one grid can be renamed at a time. Select at least on cell in the specific grid to rename it.

> **Note**
>
> It is not recommended to use Excel's Name Manager to rename a grid range. It could cause a loss of metadata. When you rename a grid range outside Smart View:
>
> - The grid's connection is broken, preventing Smart View from identifying it.
> - You cannot perform any grid operations on such a grid.
> - You cannot view the grid's details in the Sheet Information dialog as it is considered invalid.

POV Behavior on Multiple-Grid Sheets

The **POV** button is enabled for multiple-grid sheets that contain only one grid, making it possible for you to toggle the button to show or hide the POV toolbar. The **POV** button remains disabled on multiple-grid sheets that contain more than one grid.

On multiple-grid sheets that contain one grid, the POV dimensions are displayed both in the grid and in the toolbar. On regular ad hoc sheets, POV dimensions are displayed in the grid only if the POV toolbar is hidden.

Smart View Behavior Options in Cloud EPM

Your administrator can set options in the web interface that affect Smart View behavior.

The options that affect Smart View behavior are:

- Suppression Mode
- Smart View Ad Hoc Behavior

See the administration documentation for your business process for instructions on setting these options. For example, for Planning, see What Application and System Settings Can I Specify?

Additionally, review the information in these topics:

- Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids
- Smart View Ad Hoc Behavior Setting and Non-Admin Access to Valid Members
- Smart View Ad Hoc Behavior Setting and Member Selection
- Smart View Ad Hoc Behavior Setting and Row/Column Suppression Options
- Smart View Ad Hoc Behavior Setting and Additional Zoom In Options
- Smart View Ad Hoc Behavior Setting and Multiple-cell Select for Ad Hoc Operations

Suppression Mode

The **Suppression Mode** application setting works with the suppression options for **No Data/Missing** and **Zero** in Smart View. In the web application, your administrator can use the **Suppression Mode** setting to change suppression behavior.

In the Smart View **Options** dialog, **Data Options** tab, you select the **No Data/Missing** and **Zero** options for **Suppress Rows**, **Suppress Columns**, or both. The settings you make in Smart View then work with the setting in your web application.

The **Suppression Mode** options in the web application and their effect in Smart View are:

- **Suppress Missing values only**—In the web application, the administrator enables this option to suppress rows, or columns, or both that contain **No Data/Missing**.

  Suppress Missing values only—In the web application, the administrator enables this option to suppress rows, or columns, or both that contain **No Data/Missing**.

  For example, in Smart View, if the **No Data/Missing** option for rows is selected, and a row contains only Missing data, then the row is suppressed; it is *not* displayed. If both the **No Data/Missing** and **Zero** suppression options are selected in Smart View for rows, and a row contains both zeroes and Missing data, then the row is displayed; it is *not* suppressed.

  The **Suppress Missing values only** option was formerly referred to as "Legacy."

- **Suppress Missing also Suppresses Zero**—In the web application, the administrator enables this option to suppress rows, or columns, or both that contain all **No Data/Missing** or all **Zeros**, or a combination of both.

  In Smart View, you must enable the **No Data/Missing** and **Zero** options for **Suppress Rows**, **Suppress Columns**, or both to see the result in an ad hoc grid.

  For example, in Smart View, if both the **No Data/Missing** and **Zero** suppression options are selected for columns, and a column contains both zeroes and Missing labels, then the column is suppressed; it is *not* displayed. Columns that contain only zeroes, and columns that contain only Missing labels are also suppressed; they are *not* displayed.

  The **Suppress Missing also Suppresses Zero** option was formerly referred to as "Standard."

See Data Options for general information on the suppression options available in Smart View.

Smart View Ad Hoc Behavior

In 21.08+, all new applications and all recreated applications use only the **Standard** setting for the **Smart View Ad Hoc Behavior** option. In these cases, the **Smart View Ad Hoc Behavior** option is not selectable.

> **Note**
>
> Existing and migrated applications will not experience any change in behavior, and **Native** will remain as the default **Smart View Ad Hoc Behavior** setting, with **Standard** being an option.
>
> The **Native** mode **Smart View Ad Hoc Behavior** setting will eventually be phased out (timeline is yet to be determined). If you are using the **Native** mode option, Oracle recommends that you plan on switching your **Smart View Ad Hoc Behavior** application setting to **Standard** mode.

Standard mode applications give you these ad hoc features and behaviors:

- In-grid POV—POV members are placed on the grid instead of in the POV toolbar.
- **Submit Data**—Using the default **Submit Data** button in the Smart View ribbon, all cells in a grid are submitted, including Smart List values, Text values, and all data cells that have been explicitly modified (made dirty). Once the submit operation is complete, the entire grid will be refreshed.

  If the grid is not in a refreshed state, then Smart View will attempt to perform a submit data without refresh operation.
- Free-form support—Supports empty columns and rows anywhere in a grid and changing the alias table. Additionally, supports member auto-refresh where deleted members are returned to the grid upon refresh.

  See Free-Form Mode.
- Saving ad hoc grids—The **Save Ad Hoc Grid** command is enabled and you can save ad hoc grids; however, the **Submit Formatting** option is not yet available.

  See Saving Ad Hoc Grids and Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids.
- Multiple-grid ad hoc—Supports multiple ad hoc grids on the same Excel worksheet. With multiple-grid ad hoc, you can submit data from any grid on the sheet. Grids based on

aggregate storage cubes and block storage cubes are supported on the same sheet. Each grid is independent; for example, if required, you can change the alias table for only one grid on the sheet.

See Working with Multiple-Grid Sheets.

- Additional Zoom In options—Supports these additional Zoom In options: **Sibling Level**, **Same Level**, and Same Generation.

  See Smart View Ad Hoc Behavior Setting and Additional Zoom In Options.

- Multiple-cell select for ad hoc operations—Supports multiple-cell selection for these ad hoc operations: **Zoom In**, **Zoom Out**, **Keep Only**, and **Remove Only**.

  See Smart View Ad Hoc Behavior Setting and Multiple-cell Select for Ad Hoc Operations.

When the **Ad Hoc Behavior** option is set to **Standard**, the following features and functionality are not supported:

- Create Smart Forms
- Open a native mode grid in standard mode; open a standard mode grid in native mode (see Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids)
- HSACTIVE is supported on multiple-grid sheets
- Zoom In on Formulas
- Preserve Formula is disabled in multiple-grid sheets

In existing and migrated web applications, your administrator can choose to enable enhanced ad hoc features and behaviors. The **Smart View Ad Hoc Behavior** options are:

- **Native** (default)—Does not enable enhanced ad hoc features.
- **Standard**—Enables enhanced ad hoc features.

Smart View Ad Hoc Behavior Setting and Saved Ad Hoc Grids

The **Smart View Ad Hoc Behavior** option setting for your application affects which saved ad hoc grids users can open and work with.

When administrators switch the **Smart View Ad Hoc Behavior** option setting between **Native** and **Standard**, ad hoc grids built and saved in one mode can be opened with limitations noted in the following table.

Smart View Ad Hoc Behavior Mode Created and Saved In	Smart View Ad Hoc Behavior Mode Opened and Refreshed In	Supported
Standard	Standard	Yes
Standard	Native	No
Native	Standard	Yes
Native	Native	Yes

For example:

- When the **Smart View Ad Hoc Behavior** option is set to **Standard**, users can open and refresh saved ad hoc grids that were created while the service was set to **Standard** or **Native**.
- When the **Smart View Ad Hoc Behavior** option is set to **Native**, users can only open and refresh saved ad hoc grids that were created while the service was set to **Native**.

Users attempting to open and refresh a grid that was created while the **Smart View Ad Hoc Behavior** option was set to **Standard** will see an error message. To open and refresh an ad hoc grid that was created while the **Smart View Ad Hoc Behavior** option was set to **Native**, ensure that the **Smart View Ad Hoc Behavior** option is set to **Native**.

Administrators: Set the **Smart View Ad Hoc Behavior** option in the application configuration options page for your service. See the administration documentation for your service for more information.

Smart View Ad Hoc Behavior Setting and Non-Admin Access to Valid Members

In ad hoc grids in Standard mode, when a non-admin user does not have an access to a valid member, then this member will be handled as a comment, and no data is displayed upon refresh. The non-admin user should not be able to distinguish between members to which he or she does not have access and comments.

Consider the following scenarios with multiple dimensions on a row, where C1 is a comment or a member to which a non-admin user does not have access:

1. C1 is placed on the innermost row dimension location. M1 and M2 are actual valid members that the non-admin user has access to. M1 and M2 are placed on the same row as C1. After refresh, the valid members will be removed; for example

   Row dimensions:

   M1 M2 C1

   After refresh

   Blank Blank C1

2. C1 is *not* placed on the innermost dimension location. Instead, a valid member, M3. is placed on the innermost location in this row. The comment, C1, will be removed on refresh and replaced with the previous top valid member on that dimension; for example:

   Row dimensions:

   M1 M2 M3

   M1 C1 M4

   After refresh

   M1 M2 M3

   M1 M2 M4

This approach helps to avoid a mix of valid members and comments on the same row, which could could cause confusion to the user.

Note the following:

- If a row consists completely of blank cells and comments, it will not be changed on refresh.
- The very first row or column is a special case as it controls grid boundaries. Mixing and matching members and comments on that row or column can result in a message about an invalid grid. This is intentional.

Smart View Ad Hoc Behavior Setting and Member Selection

In Smart View, when connected to a Standard mode application (20.09+), the dimension or member from which you invoke **Member Selection** is shown as the selected dimension in the dialog. In Standard mode, there is no need to refresh the grid before selecting a different dimension or member on the grid, and invoking **Member Selection**. The selected dimension will be shown in **Member Selection** by default.

Smart View Ad Hoc Behavior Setting and Row/Column Suppression Options

In Standard mode, certain row and column suppression options in the Options dialog in Smart View are not supported, although they appear as selectable in the dialog.

- Row Suppression Options not supported in Standard mode:
  - No Access
  - Invalid
  - Underscore Character
- Column Suppression Options not supported in Standard mode:
  - No Data/Missing
  - Zero
  - No Access

> **Note**
>
> Selecting the **No Access** suppression option for rows or columns results in this error message upon refresh:
>
> No Access suppression option is not supported.

Smart View Ad Hoc Behavior Setting and Additional Zoom In Options

In Standard mode, these additional commands are available from the drop-down menu on the **Zoom In** button in the provider ad hoc ribbon:

- **Sibling Level**—Select to retrieve data for the siblings of the selected member or members. For example, in the Vision sample database, a zoom in operation on Jan retrieves Jan, Feb, and Mar.
- **Same Level**—Select to retrieve data for all members at the same level as the selected member or members. For example, in the Vision sample database, a zoom in on Q1 retrieves Q2, Q3, and Q4.
- **Same Generation**—Select to retrieve data for all members of the same generation as the selected member or members. For example, in the Vision sample database, a zoom in on Q1 retrieves Q2, Q3, and Q4.

Smart View Ad Hoc Behavior Setting and Multiple-cell Select for Ad Hoc Operations

In Standard mode, you can select multiple row or column member cells and then perform any of the following actions:

- **Zoom In**, including any of the zoom options, such as Bottom Level or Same Generation.
- **Zoom Out**. Zooming out collapses the view to the next upper level.
- **Keep Only** and **Remove Only**. Note that the integrity and validity of the grid must be maintained. If your selections cause an issue with the grid, Smart View display a warning message informing you of the issue, and no change is made to the grid.

10

Books

Using the EPM Books extension, you can import Books in to Excel 365 and work with them by changing their POV values and refreshing them.

Related Topics

- About the EPM Books Extension
  The EPM Books extension in Smart View helps you to import Oracle Fusion Cloud Enterprise Performance Management Books into Excel 365 in a refreshable format.
- Launching the EPM Books Panel
  You can launch the EPM Books panel whenever you connect to an Oracle Fusion Cloud Enterprise Performance Management business process that contains books.
- Working with Books
  In the EPM Books panel, view book properties, import and download books in to Oracle Smart View for Office, and manage import jobs in Jobs Console.
- Managing Jobs in Jobs Console
  In addition to downloading books from the Jobs Console in the EPM Books panel, you can also refresh the status of jobs, remove jobs, and view jobs from the connection from which you have imported books.

About the EPM Books Extension

The EPM Books extension in Smart View helps you to import Oracle Fusion Cloud Enterprise Performance Management Books into Excel 365 in a refreshable format.

Applies to: Cloud EPM data source providers

In Cloud EPM, Books are a collection of one or more reports, books, and other documents, that you generate into a single PDF or Excel output (for Excel output caveats, see the Note below).

Using the EPM Books extension for Oracle Smart View for Office (Mac and Browser), you can import books in to Excel 365 and work with them by changing POV values and refreshing. You can also open and work with books that were downloaded in Excel format from the web application.

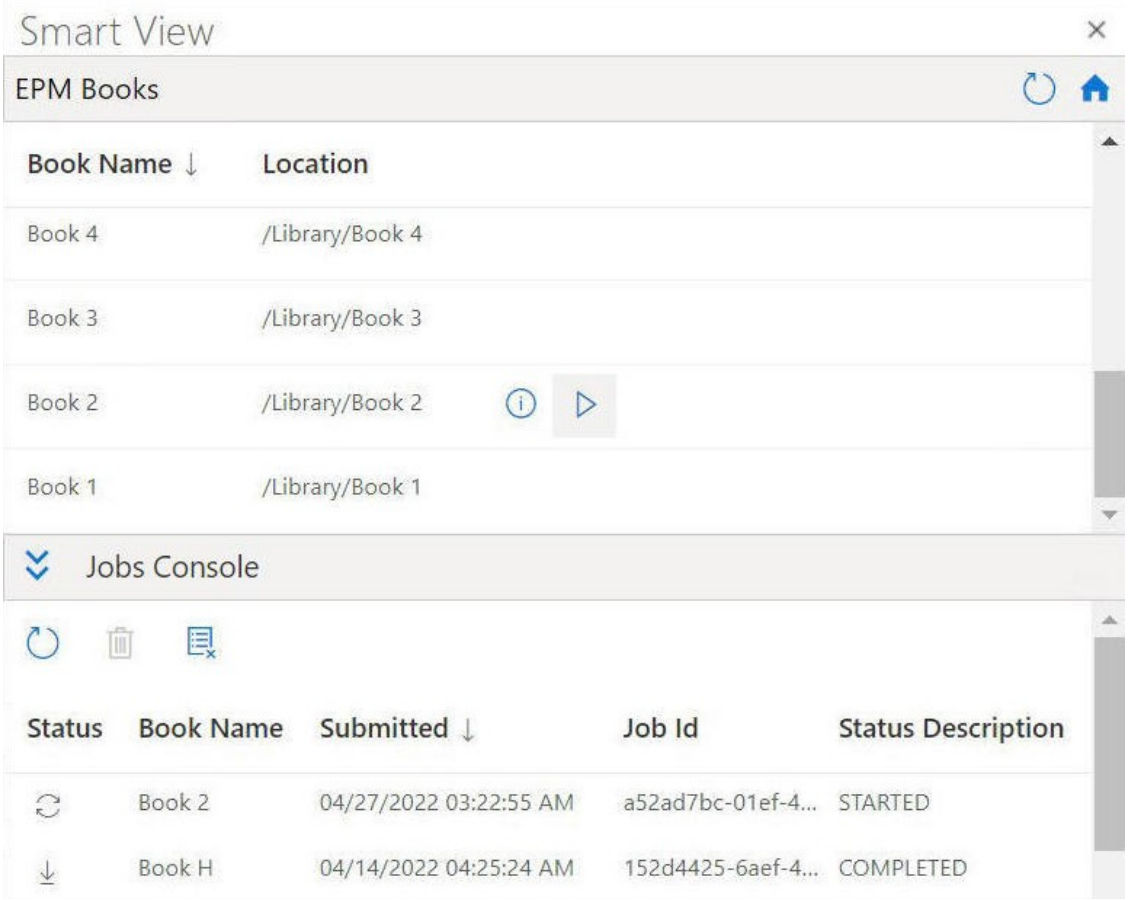
> **Note**
>
> Only reports are included in the Excel Books opened or imported in Smart View. Other documents, such as Word and PDF files, and inserted books are not available for viewing.

From the EPM Books panel in Smart View, you can view properties for a book, and import books into Excel.

Each book you import is a "job." Check the **Jobs Console** in the EPM Books panel for the status of the job. You do not need to wait for a job to complete to invoke another job or perform

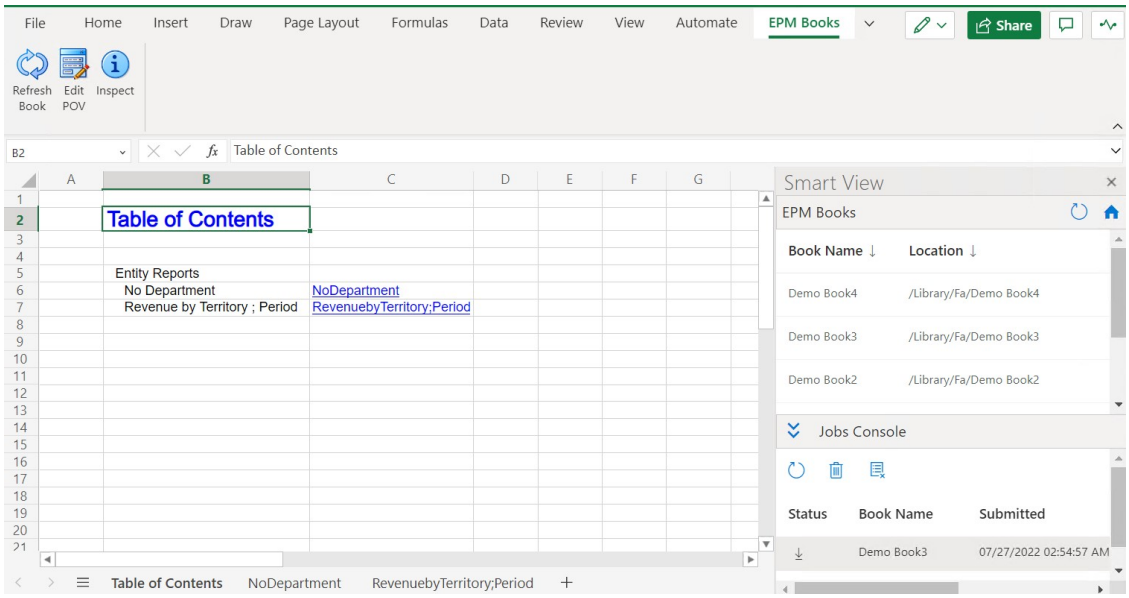
other operations in the panel or elsewhere in Smart View. You can refresh job status, delete selected jobs, or delete all completed jobs in the Jobs Console.

Figure 10-1 Example of EPM Books Panel



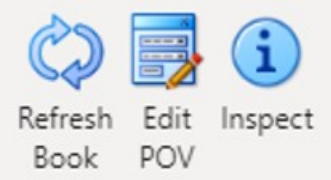
From the **Jobs Console**, download a book into Excel. In the downloaded book, each report is placed on an individual worksheet. A table of contents sheet is generated with links to the individual report sheets in the workbook. The worksheet names are based on the TOC Headings defined in the Properties panel in the Book Designer in the web application.

Figure 10-2 Example of TOC Sheet and Worksheet Tabs in Book Imported into Excel 365



After importing a book into Smart View, you can use the options on the EPM Books ribbon to change the POV of the reports in a book, and to refresh the book content. You can also use the Inspect button to view properties of the book, including the POV.

Figure 10-3 EPM Books Ribbon



Guidelines for Working with Books in Smart View

- Changing the POV: Excel 365 currently does not support Member Selection in the **Select POV** dialog if the Book POV definition is set to "All".

  If the Book POV definition is set to "Display Selected Values," the list of available members to choose from is displayed in the drop-down list for each dimension.
- Nested books are not supported in Excel 365. For example, if there is a book contained within a book, the inner book will be suppressed. The resulting Excel workbook will not contain the content related to the nested inner book.
- PDF and Word documents inserted as part of a book are not supported. When a book includes other documents of type PDF or Word, they will be omitted from the Excel workbook.

Launching the EPM Books Panel

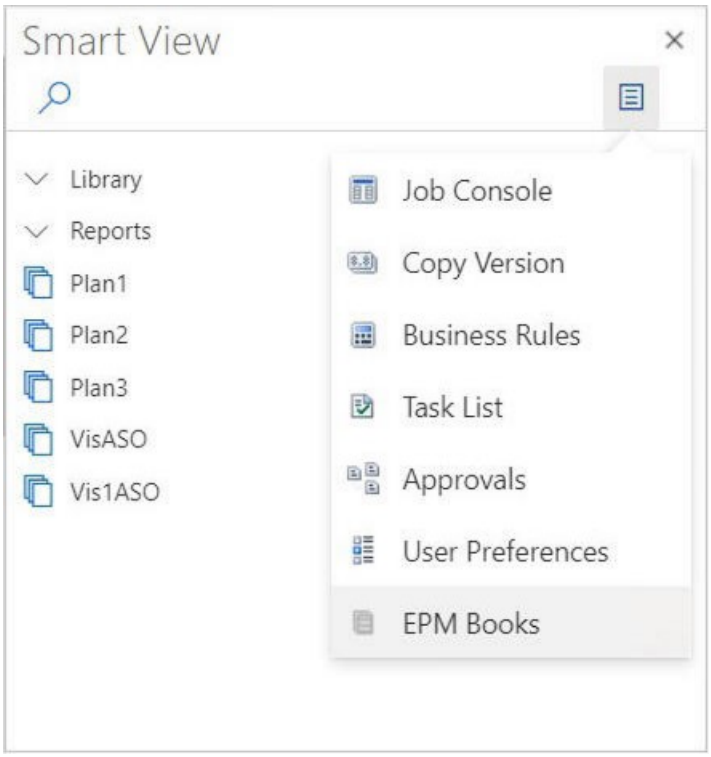
You can launch the EPM Books panel whenever you connect to an Oracle Fusion Cloud Enterprise Performance Management business process that contains books.

Before you launch the EPM Books panel, ensure that the EPM Books extension is enabled through the manifest file. For more information, see Enabling Extensions in Smart View (Mac and Browser) in *Deploying and Administering Oracle Smart View for Office (Mac and Browser)*.

To launch the EPM Books panel:

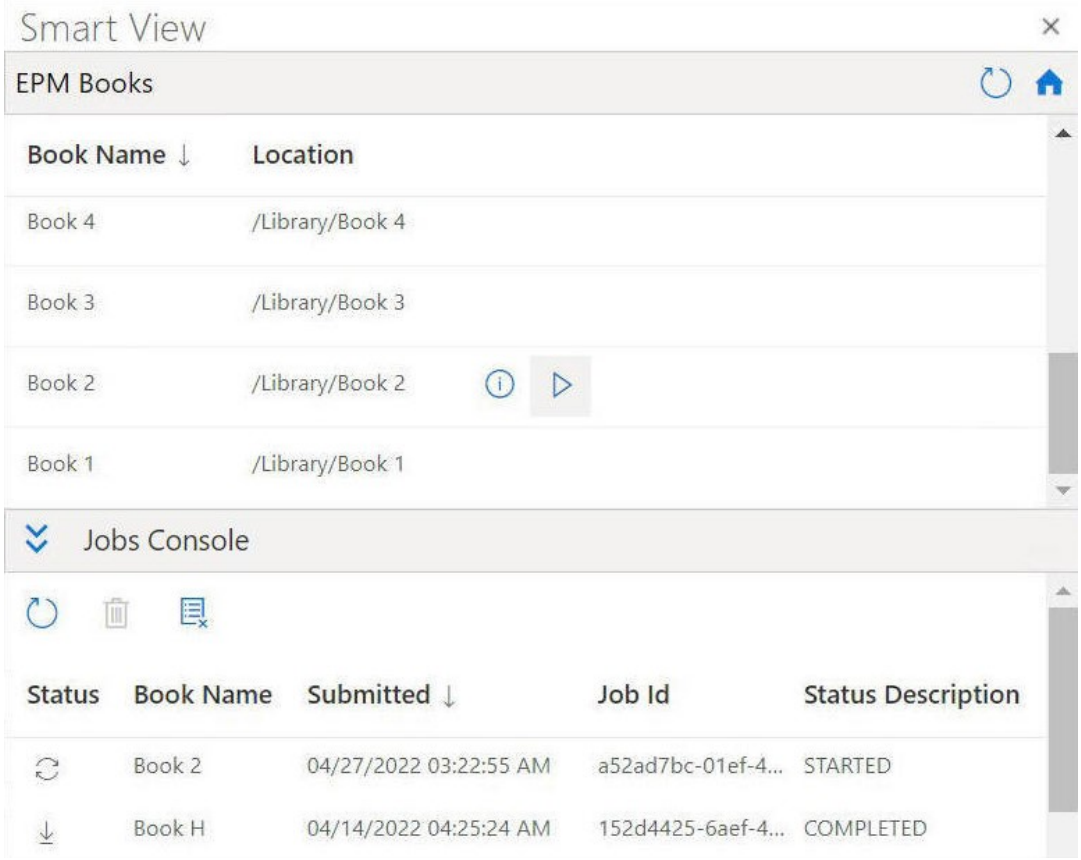
1. Connect to the data provider that contains books.
2. In the Smart View Home panel, click the **Actions** menu and then click **EPM Books**.

Figure 10-4 Launch EPM Books Panel



The EPM Books panel is displayed as shown in the following example.

Figure 10-5 Example of EPM Books Panel



You can click

on the EPM Books panel to refresh the list of available books.

You're now ready to begin using the Books functionality available in Oracle Smart View for Office (Mac and Browser).

Working with Books

In the EPM Books panel, view book properties, import and download books in to Oracle Smart View for Office, and manage import jobs in Jobs Console.

Related Topics

- Importing Books
  You can import books to download and work on them in Oracle Smart View for Office (Mac and Browser).
- Working with Downloaded Books
  Once imported, you can view the reports present in the book, change the POV, inspect book properties, ad refresh the book to get the latest data.

Importing Books

You can import books to download and work on them in Oracle Smart View for Office (Mac and Browser).

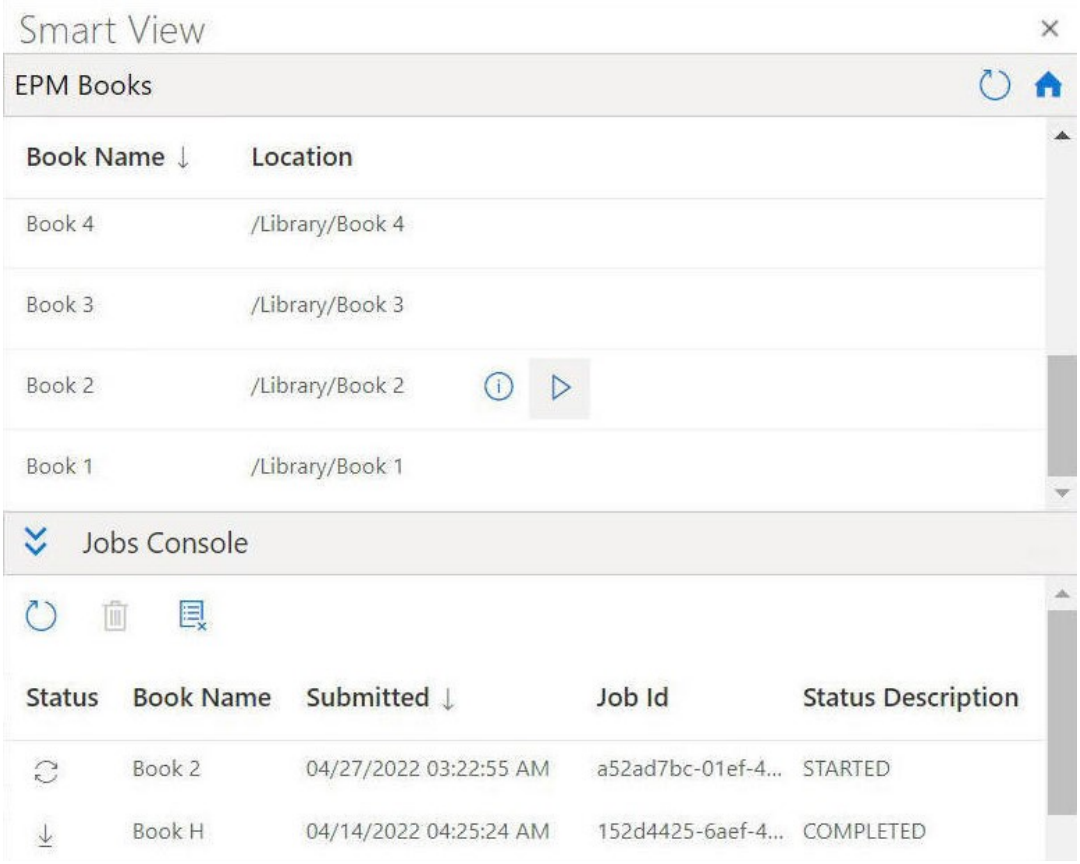
Before you begin importing books, you should have already connected to a data source and launched the EPM Books panel, as described in Launching the EPM Books Panel.
To import books:

1. In the list of books in the EPM Books panel, click
   ▷
   next to the book that you want to import.

   The import process begins.

   For each book that you import, a separate row is added to the Jobs Console pane in the EPM Books panel. The following example shows the EPM Books panel with two jobs in the Job Console, one in progress with Started status and one with Completed status. The panel is expanded so that you can see all columns in the Jobs Console.

Figure 10-6 EPM Books Panel Showing Jobs in the Jobs Console



2. In the **Jobs Console,** , click
   ↻
   to refresh the job status of the import process for your book.

   The job status icons for individual jobs are:

- —Job is in progress. Click to update the job status.
- —Job is completed. Click to download the job.
- —An error has occurred. Click to view the error message.

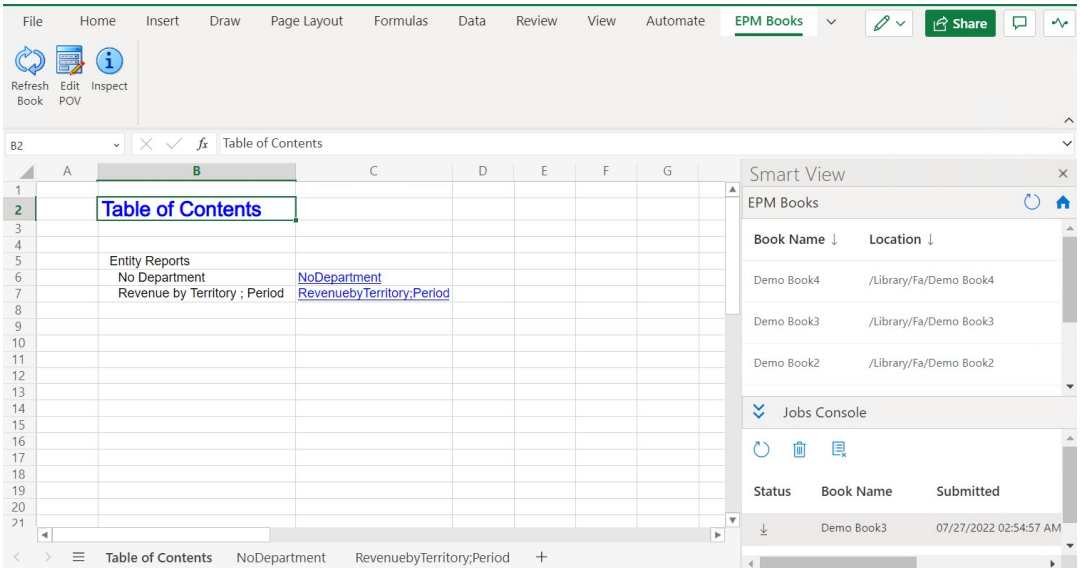
3. In the list of jobs in the Jobs Console, click

next to a completed job to download it in to Oracle Smart View for Office and then click **Yes** at the prompt to confirm the download.

> **Note**
>
> Only reports are included in the book imported and downloaded into Excel. Inserted books or third-party documents, such as PDFs or Microsoft Word documents, are not included in the Excel Book import.

The book opens in Excel and a table of contents sheet is generated with links to the individual report sheets in the workbook, as shown in the following example.

Figure 10-7 Example of TOC Sheet and Worksheet Tabs in Book Downloaded into Excel 365



4. Click the workbook tabs to view the Reports contained within the downloaded book.
5. Continue with Working with Downloaded Books.

Working with Downloaded Books

Once imported, you can view the reports present in the book, change the POV, inspect book properties, ad refresh the book to get the latest data.

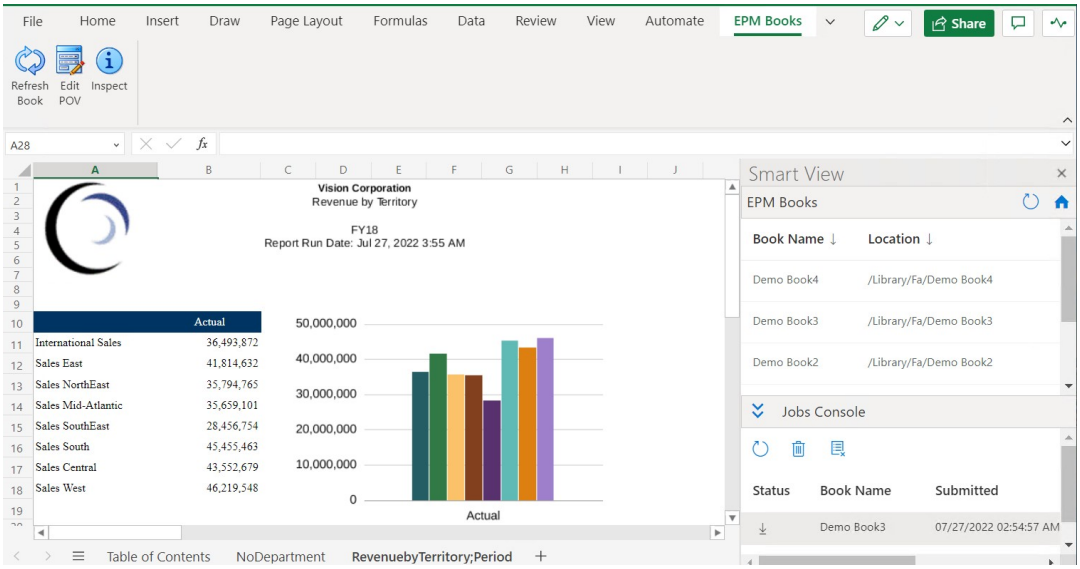
For working with downloaded books, complete importing them in Oracle Smart View for Office (Mac and Browser) using the steps mentioned in Importing Books. The books-specific options are displayed in the EPM Books ribbon.
To work with downloaded books:

1. To view the reports contained in the book, click the links in the Table of Contents tab.

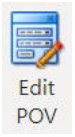
   Each worksheet tab is a report that is part of the book that was imported and downloaded to Smart View.

   You can also click the worksheet tabs in after the Table of Contents tab to view the various reports in a book.

Figure 10-8 Example of Report Contained in Book Downloaded into Excel 365

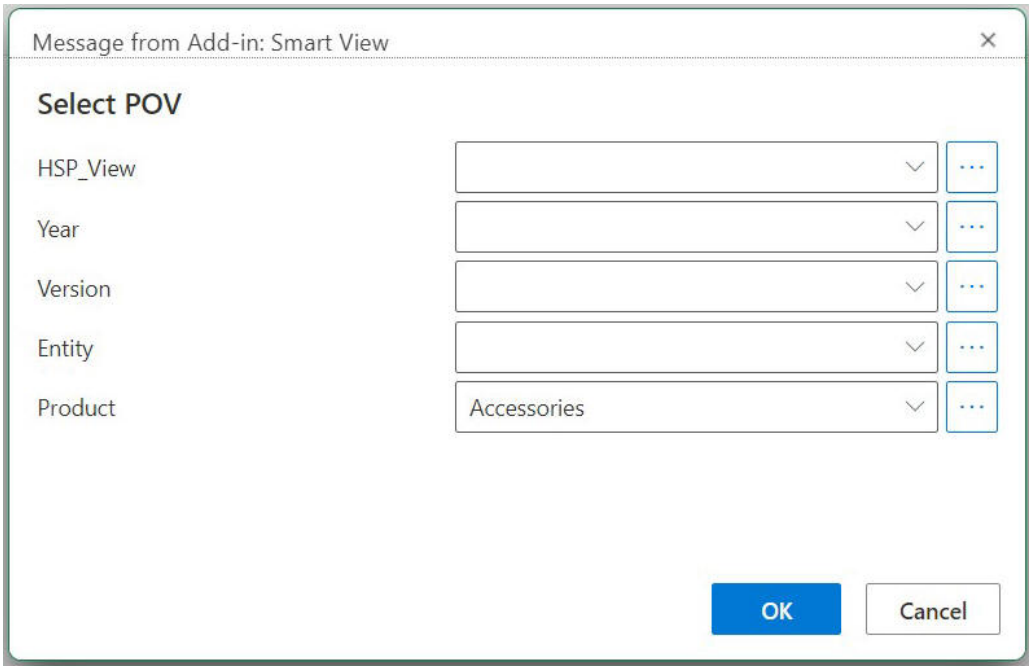


2. To change the POV for the book:

   a. In the EPM Books ribbon, click **Edit POV** in the **Books** section. 

   b. In the **Select POV** dialog, make selections in the drop-down lists for each dimension. If aliases are specified for dimensions in the report, you will see the member aliases in the drop-down selection list in the **Select POV** dialog.

Figure 10-9 Example of POV Selection



c. Click

button to launch the **Member Selector** dialog and select the required members from the list. These members are displayed in the drop-down lists for the specific dimension.

> **Note**
>
> The
>
> 
>
> button is enabled in the **Select POV** dialog only if the **Allow All Selections** option is selected while setting up POV for the book in Book Designer. For more information, see Setting the Book Point of View in *Designing with Reports*.

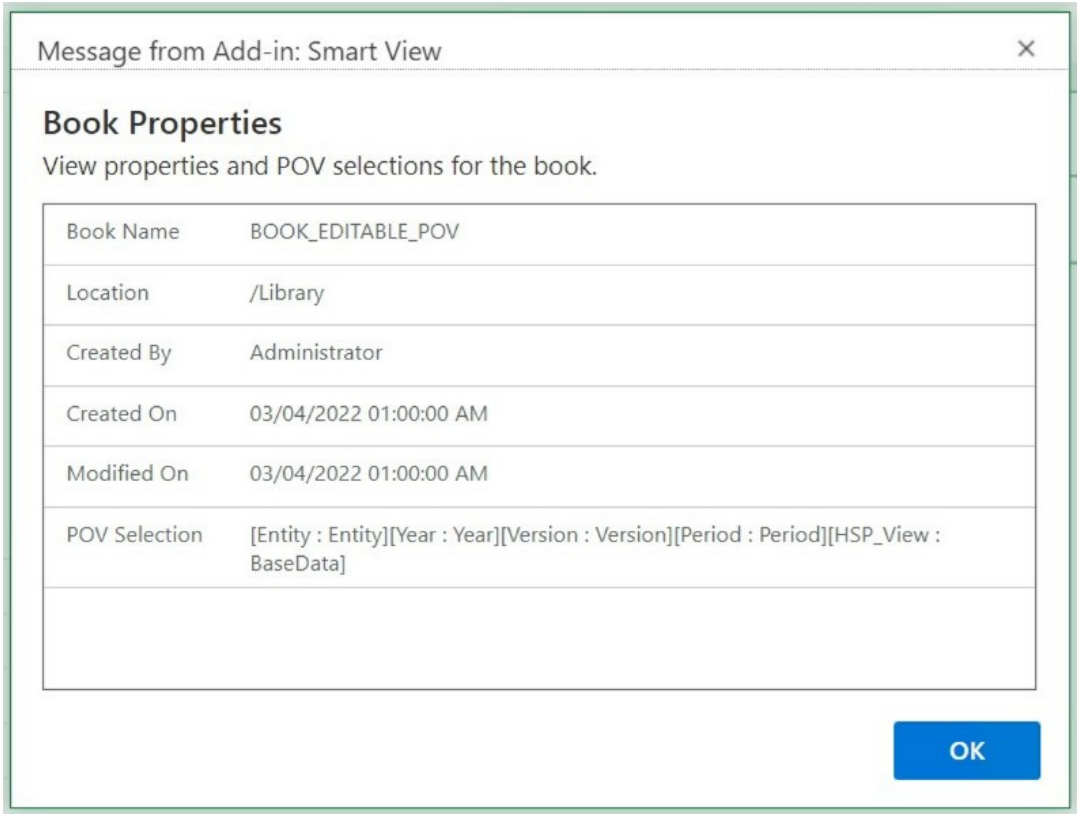
d. Click **OK**.
A message notifies you that refresh operation with the newly-selected POV values is in progress. Click **OK** in the message. A new job gets created in the Jobs Console. You can check the status of the job and download the book once the job is completed. The newly-downloaded book will show the updated results that reflect the new POV values.

3. To view properties for the book, in the EPM Books ribbon, click **Inspect** 

.

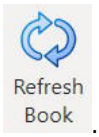
   The **Book Properties** dialog is displayed with the properties of the book, along with the POV Selections for the book.

Figure 10-10 Example of Book Properties



Click **OK** to close the **Book Properties** dialog.

4. To refresh the currently-selected report, in the EPM Books ribbon, click **Refresh Book**



Use the Refresh Book command when data is changed in the business process. For example, when a change is made in Planning data.

A new job gets created in the Jobs Console. You can check the status of the job and download the book once the job is completed. The newly-downloaded book will show the refreshed data values.

Managing Jobs in Jobs Console

In addition to downloading books from the Jobs Console in the EPM Books panel, you can also refresh the status of jobs, remove jobs, and view jobs from the connection from which you have imported books.

Related Topics

- About the Jobs Console
  A job represents a process of importing a book in to Oracle Smart View for Office (Mac and Browser). The Jobs Console in the EPM Books panel displays a list of jobs from the connected data source from which you have imported books.

- Working with Jobs in Jobs Console
  In the Jobs Console, you can view and refresh the status of jobs, and remove the jobs you no longer require.

About the Jobs Console

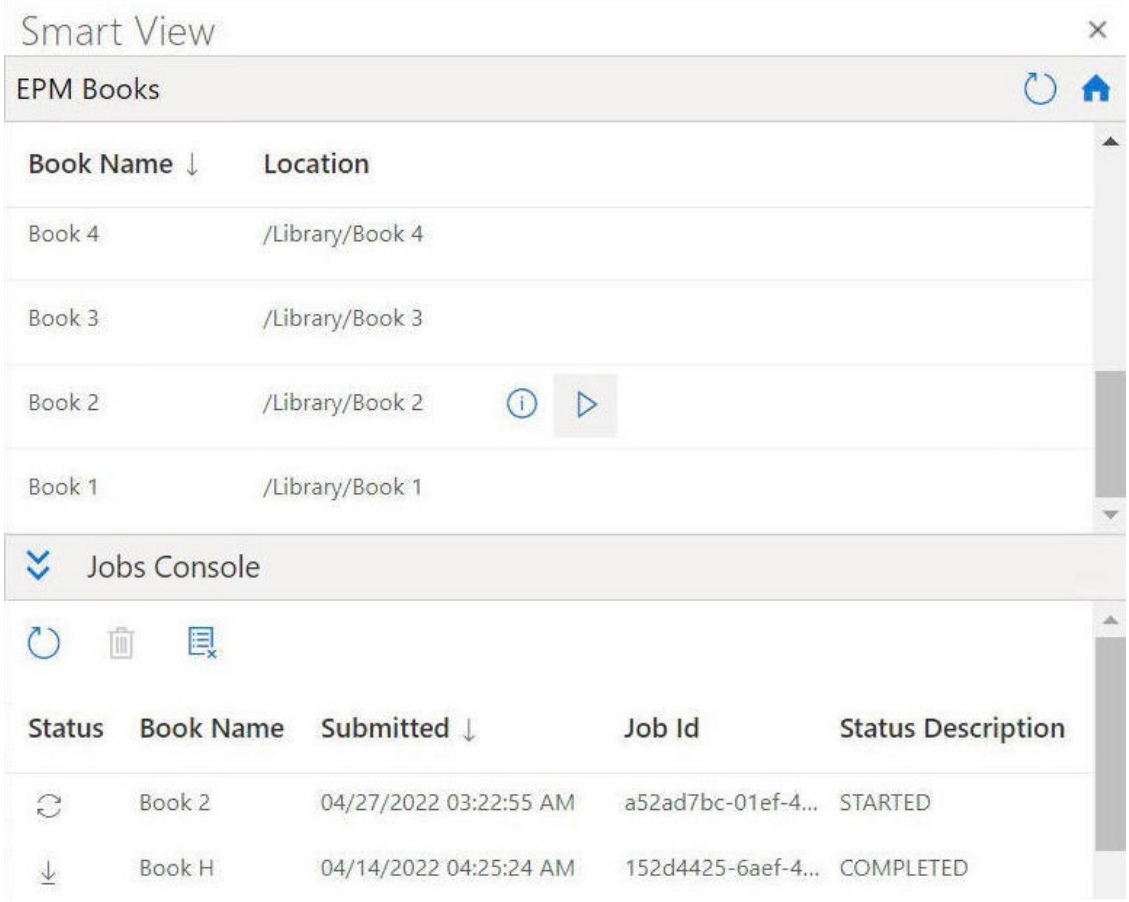
A job represents a process of importing a book in to Oracle Smart View for Office (Mac and Browser). The Jobs Console in the EPM Books panel displays a list of jobs from the connected data source from which you have imported books.

In the Jobs Console, you can refresh the status of jobs, download imported books to Smart View, and remove jobs.

The top portion of the EPM Books panel lists all books available for import from the connected data source. Once you import a job, a job is added to the Jobs Console. Each row in the Jobs Console lists the jobs for books that you have imported.

The following example shows the EPM Books panel with a list of books. Out of them, two books have been imported and the jobs are shown in various states in the Jobs Console.

Figure 10-11 Example of Books Panel with Jobs Listed in the Jobs Console



For each job, the Jobs Console provides the following information:

- **Status**—The status of the job, indicated by an icon:

- —Job is in progress. Click to update the job status.
- —Job is completed. Click to download the job.
- —An error has occurred. Click to view the error message.

- **Submitted**—The date and time the job was submitted for import.
- **Book**—The name of the book that was submitted for import.
- **Status Description**—Valid status descriptions are: **Started**, **Completed**, and **Error**.
- **Job ID**—An internal ID issued for each job by the business process.

The Jobs Console toolbar, located above the list of jobs, provides options for managing jobs, including refresh all jobs, delete selected jobs, and delete all completed jobs options.

Figure 10-12 Jobs Console toolbar

Continue with Working with Jobs in Jobs Console for information on using the options in the Jobs Console.

Working with Jobs in Jobs Console

In the Jobs Console, you can view and refresh the status of jobs, and remove the jobs you no longer require.

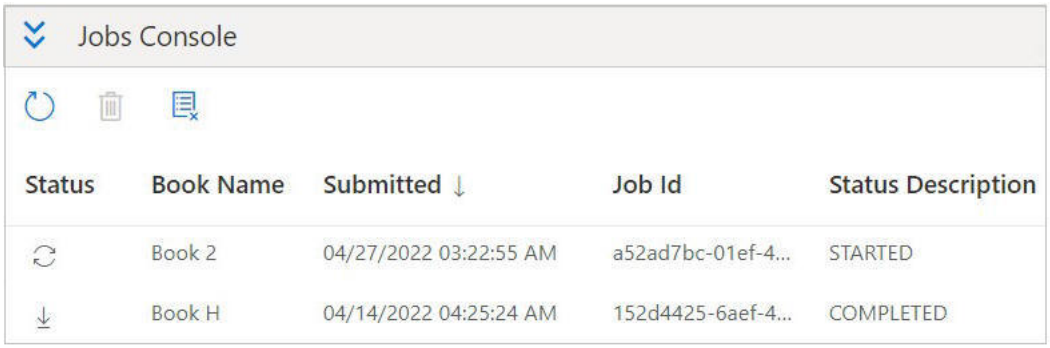
Before you begin working with jobs in the Jobs Console, you should have launched the EPM Books panel, as described in Launching the EPM Books Panel and initiated the importing of books as described in Importing Books.
To manage jobs in the Jobs Console:

1. Expand the Jobs Console by clicking
   , if it appears collapsed.

   The **Jobs Console** displays jobs from imported books of all status types: in-progress jobs, completed jobs, and jobs that resulted in error.

   The Jobs Console toolbar is also displayed on the top of the list of jobs.

Figure 10-13 Example of Jobs Console



2. To refresh the jobs in the **Jobs Console**, perform any of the following tasks:
   - To refresh the status of all jobs in the **Jobs Console**, click
     
     in the Jobs Console toolbar.
     The status of all jobs that you have submitted is refreshed.
   - To refresh a specific job, select the job and click

     in the row for the job.
     The status of the selected job is refreshed.
3. To delete the jobs in the **Jobs Console**, perform any of the following tasks:
   - To delete all completed jobs, click
     
     .
     Completed jobs are deleted from the **Jobs Console**.
   - To delete a specific completed job, select the row for the job in the **Jobs Console** and click
     
     .
     You can use the **Control** key to select more than one contiguous or non-contiguous job from the list, and then click
     
     .
     The selected jobs are deleted from the list of jobs in the **Jobs Console**.

11

Reports

Reports is a cloud-based reporting solution for creating Oracle Fusion Cloud Enterprise Performance Management financial and managerial reports.

Related Topics

- About Reports in Smart View
  Reports is a cloud-based reporting solution for creating Oracle Fusion Cloud Enterprise Performance Management financial and managerial reports. It enables users to insert charts and grids utilizing Cloud EPM sources, such as Planning or Financial Consolidation and Close, into a report.
- Importing Reports as Ad Hoc Queries
  You can import Reports in to Oracle Smart View for Office as ad hoc queries, on which you can then perform available ad hoc operations.
- Importing and Working with Fully Formatted Reports
  Import reports in to Smart View as fully-formatted reports.

About Reports in Smart View

Reports is a cloud-based reporting solution for creating Oracle Fusion Cloud Enterprise Performance Management financial and managerial reports. It enables users to insert charts and grids utilizing Cloud EPM sources, such as Planning or Financial Consolidation and Close, into a report.

Applies to: Cloud EPM data source providers

Report grids are tables that contain data from external data source connections. Administrators add grids to Reports, defining the dimension layout, selecting members, and then formatting the grid. Using text, dimensions, members, and formulas, administrators define the grid content.

Using the Oracle Smart View for Office in Excel, you can:

- Import the report grids as ad hoc grids.

  Perform supported ad hoc operations on the grids, such as pivoting and member selection, directly against the data source.

  See Importing Reports as Ad Hoc Queries.
- Import Reports in to Smart View as fully-formatted reports.

  If prompts are included in the report, you specify the prompts upon import.

  Note that there will be some differences between reports imported in the web and reports imported in to Excel, described in Differences between Reports and Reports Imported in Excel in *Designing with Reports*, available on the Oracle Help Center, **Books** tab, for your Cloud EPM business process.

  Once imported, you can:

  – Change the POV and refresh the report data, as needed.

  – Edit the prompts.

- Distribute the report to others as Excel files.
- Generate an ad hoc grid from the report, and then perform further ad hoc operations for the purpose of data analysis.

See Importing and Working with Fully Formatted Reports.

> **Note**
>
> For more information, see *Designing with Reports*, available on the Oracle Help Center, **Books** tab, for your Cloud EPM business process.

Importing Reports as Ad Hoc Queries

You can import Reports in to Oracle Smart View for Office as ad hoc queries, on which you can then perform available ad hoc operations.

> **Note**
>
> Before you begin, launch Smart View in Excel and log into Planning.

To import a report in to Smart View as an ad hoc query:

1. In the Smart View ribbon, click **Home** to launch the Smart View Home panel, where the library folder and cubes are displayed.
2. In the Smart View panel, expand the tree list select **Reports**.

   All reports available can be accessed from the **Reports** folder. Alternatively, if reports are stored in a user-defined folder, you can navigate to that folder.
3. Expand a report to view the available grids, and then select a grid.
4. In the **Actions** panel, click **Query Ready**.

   Alternatively, you can double-click the selected grid.

   The report grid is rendered as an ad hoc query in Smart View.

   > **Note**
   >
   > Report grid text and formula rows and columns are not imported into Excel; only data is imported.
5. Perform ad hoc operations as required.

   For example, you can:

   - Zoom in on members
   - If available, click the **POV** button in the provider ad hoc ribbon to display or hide the POV toolbar
   - Pivot POV dimensions or members to the grid
   - Use **Member Selection** to change the grid point-of-view

Importing and Working with Fully Formatted Reports

Import reports in to Smart View as fully-formatted reports.

> **Note**
>
> Before you begin working with fully-formatted reports in Smart View, launch Smart View in Excel and log in to your Oracle Fusion Cloud Enterprise Performance Management business process.

To import and work with a fully-formatted report:

1. In the Smart View ribbon, click **Home** to launch the Smart View Home panel, where the library folder and cubes are displayed.
2. In the Smart View panel, expand the tree list select **Reports**.

   All reports available can be accessed from the **Reports** folder. Alternatively, if reports are stored in a user-defined folder, you can navigate to that folder.
3. Select a report and then, in the **Actions** panel, click **Import Reports**.

   Alternatively, you can right-click the report name, and click **Import Reports**.
4. If **Preview POV** is enabled for reports, you can choose to use the default POV by clicking **OK** in the **Select POV** dialog; or, you can change the POV as described in Previewing POV in Reports and then click **OK**.

   > **Note**
   >
   > If you click **Cancel** in the **Select POV** dialog box, the import process is cancelled and the report does not get imported in Smart View.
5. Click **Yes** in the confirmation dialog that states that the report opens in a new workbook.

   The fully-formatted report is rendered in to a new workbook.

   Note that the report may contain a number of grids, charts, text objects and images laid out across one or more pages. All those objects are brought in to the Excel workbook upon import.

   Text boxes in the report are converted to images in the imported Excel worksheet. In some cases, you may need to manually resize the image box in Excel to match the report presentation. To resize an image, use Excel's image formatting tool. Right-click the image and select **Size and Properties**. In **Format Picture**, set **Scale Height** and **Scale Width** to 100%.
6. In the new workbook, from the Smart View ribbon, click **Home** to launch the Smart View Home panel, where the library folder and cubes are displayed.

   The **Reports** ribbon also appears in the menu.
7. **Optional:** After importing the report, you can do the following:
   - To edit the POV of a sheet, click **Edit POV** in the **Reports** ribbon, and follow the procedure in Changing the POV in Reports.

- If prompts are available to edit, click **Edit Prompts** in the **Reports** ribbon, and follow the procedure in Editing Prompts in Reports.
- To refresh the report when the underlying data in the report changes during your session, click **Refresh Report** in the **Reports** ribbon.

> **Note**
>
> When you edit prompts, edit the POV, or refresh the report, the current workbook is refreshed and reloaded. Only the data in the grid is refreshed. If you have entered data out of the grid, that remains in the workbook.

8. **Optional:** Use the Excel **Save** or **Save As** commands to save the workbook.

Previewing POV in Reports

Previewing the POV gives you the ability to control and edit it before importing or inserting a report.

When you import a report from Oracle Fusion Cloud Enterprise Performance Management, you can preview and set the POV.

Before you begin, you need to enable the User Preference option for Reports, **Preview POV**, in the web application. From a Cloud EPM business process, navigate to **Tools**, select **User Preferences**, and then select the **Preview POV** check box in the **Reports** tab.

To preview and select the POV when importing a report:

1. In the **Select POV** dialog, view the default POV specified for the report and click **OK** if you want to proceed importing the report without changing the POV.

> **Note**
>
> If you click **Cancel** in the **Select POV** dialog box, the import process is cancelled and the report is not imported in to Smart View.

2. To edit the POV of the report, select a value in each dimension drop-down list and click **OK**:

   You can also edit the POV after importing the report by following the procedure in Changing the POV in Reports.

Editing Prompts in Reports

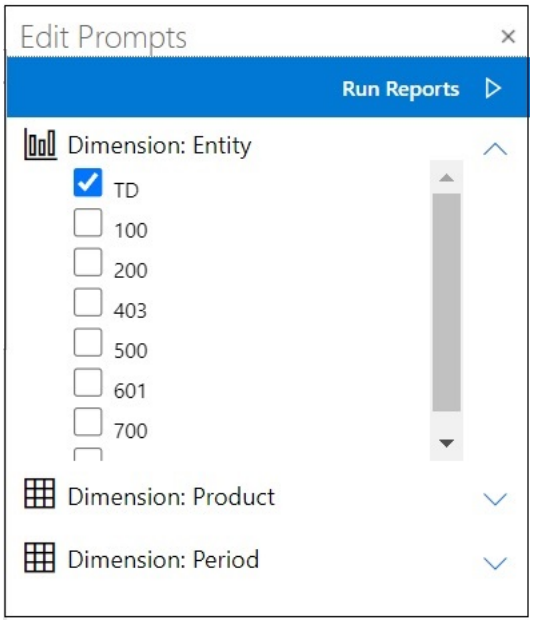
If the report contains prompts, you can choose to use the default prompts or change them after importing the report.

> **Note**
>
> Before you begin:
>
> - You should have imported the report as explained in Importing and Working with Fully Formatted Reports.
> - Save the workbook if there are changes that you want to keep. The workbook will be closed and regenerated when you edit prompts.

To change the prompts for a report:

1. In the Smart View ribbon, click **Edit Prompts**.
2. In the **Edit Prompts** panel, select the required dimensions from the drop down list.

   For example, in the following illustration, the report prompt type, , is selected for the Entity dimension.



> **Note**
>
> Report prompt types are represented by the bar chart icon, ; and Grid prompt types are represented by the grid icon, .

3. Repeat step 1 for each prompt selection that you want to edit, and then click **Run Reports** to import the report.

The sheets in the resulting workbook will appear in alphabetical order, just as they were listed in the **Edit Prompts** panel. You can manually reorder the sheets, if required.

Changing the POV in Reports

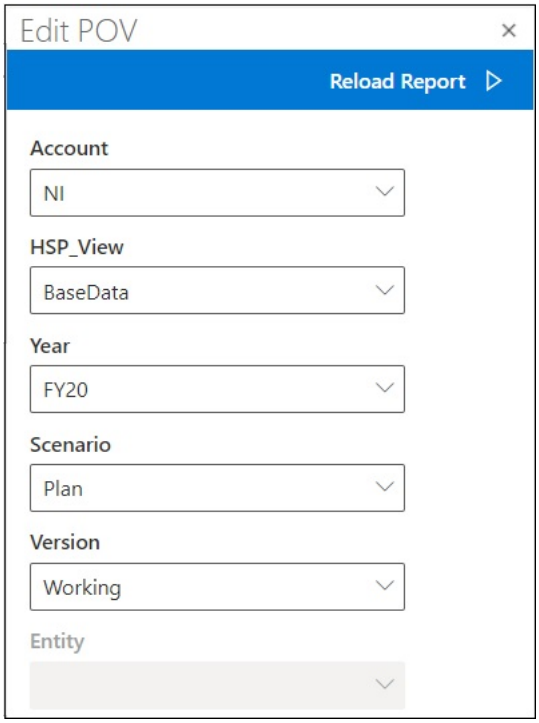
You can change the POV in a report.

> **Note**
>
> Before you begin:
>
> - You should have imported the report as explained in Importing and Working with Fully Formatted Reports.
> - Save the workbook if there are changes that you want to keep. The workbook will be closed and regenerated when you edit the POV.

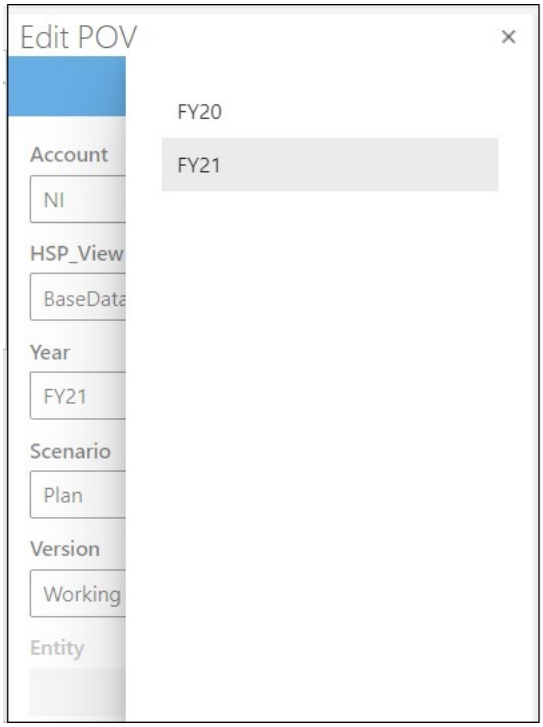
To change the POV in an imported report.

1. In the Smart View ribbon, click **Edit POV**.

   This launches the **Edit POV** panel.



   Use the drop-down arrow in each field to locate drop-down menus indicating that the dimension POV can be changed.



2. If the drop-down list contains a fixed list of options, select an option from the list.
3. Click drop-down list to open the member selection.

   In the example in step 1 , the Year dimension contains a select option.
4. Click **Reload Report**.

   The formatted report is regenerated using the updated POV.

12

Dashboards

You can open Oracle Fusion Cloud Enterprise Performance Management dashboards, and view and change their details.

Related Topics

- About Dashboards
  Dashboards provide an overview to users of their planning and forecast process by showing summary data. Dashboards are especially useful when you start your planning and forecast process.
- Working with Dashboards
  Dashboards give you an overview to key information and let you change and save data.

About Dashboards

Dashboards provide an overview to users of their planning and forecast process by showing summary data. Dashboards are especially useful when you start your planning and forecast process.

Applies to: Cloud EPM data source providers

In Oracle Smart View for Office (Mac and Browser), dashboards give you access to key information and let you enter, change, and save data. Dashboard objects are displayed in table format, with each object displayed on a separate sheet within a workbook.

Working with Dashboards

Dashboards give you an overview to key information and let you change and save data.

You can open Oracle Fusion Cloud Enterprise Performance Management dashboards in Oracle Smart View for Office.

To open a dashboard:

1. Connect to a Cloud EPM data source that contains dashboards.
2. From the tree list in the Smart View Home panel, click a dashboard, indicated by this icon:

   The dashboard opens in the active Excel workbook, with each dashboard object displayed in table format in separate worksheets. For example, if a dashboard contains four objects, then four additional worksheets will be launched in the active workbook. Whether the active workbook is new consisting of one blank worksheet, or already in use consisting of several worksheets with a form or ad hoc grid on each sheet, the dashboard objects will be launched on additional sheets in the active workbook.

   For more information on dashboards:

- **Administrators:** See the topics on designing dashboards in the *Administering* guide for your cloud business process.
- **End users:** See the topics on using dashboards in the *Working with* guide for your cloud business process.

13

Planning Approvals

Related Topics

- About Planning Approvals
  Planning approvals is the submission, review, and approval process of a planning unit.
- Viewing Planning Units
  You can view the list of planning units in the Manage Approvals panel.
- 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.
- Changing Status of Planning Units
  You can change the status of one or more planning units at a time.
- Viewing Promotional Path for Planning Units
  You can view the promotional path of a planning unit in graphical form.
- Adding Annotations for Planning Units
  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
- Setting up an 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.

Applies to: 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

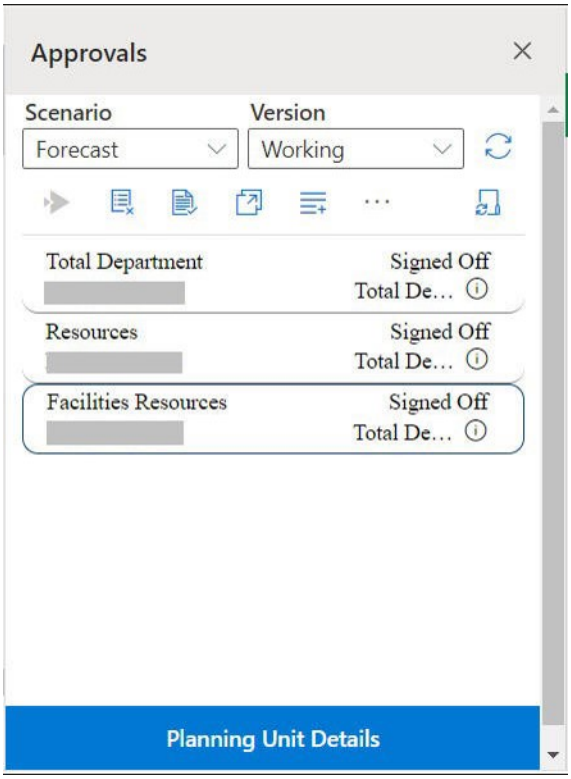
Viewing Planning Units

You can view the list of planning units in the Manage Approvals panel.

To open the Manage Approvals panel and view the planning units:

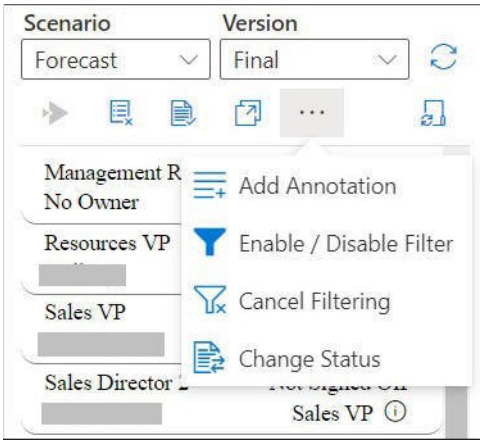
1. Open the appropriate form.
2. From the Planning ribbon, select **Approvals**, to open the **Manage Approvals** panel. Alternatively, you can also click the **Actions** menu in the Smart View Home panel and select **Approvals**.

Figure 13-1 Approvals panel



3. In the **Manage Approvals** panel, select a **Scenario** and **Version**.
4. Click to display the list of planning units to which you have access.
5. Select the planning unit that you want to view or work on.
   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**.
   - In the **Approval Status** tab, you can view a history of the process status, owner, actions taken, and the dates and times the status changed.
   - In the **Annotations** tab, you can view any comments that were entered for the planning unit. See Adding Annotations for Planning Units.
7. Click **Close** to return to the Manage Approvals panel.
8. Perform actions on the planning units using the toolbar on top of the list. Click the ellipsis button to see more actions.

Figure 13-2 Toolbar to perform various actions on planning units



- — Exclude planning units from the approval process and remove them from the list.
- — Validate planning units to run any data validation rules set by administrators.
- — View promotional path for planning units.
- — Add annotations or comments for planning units.
- — Filter the list of planning units using different criteria.
- — Cancel any filters applied on the planning units list.
- — Change the status of planning units.
- — Set actions to manage planning units when you are out of office.

9. Click to close the Manage Approvals panel and return to the Smart View Home panel. If you opened the Manage Approvals panel from the **Actions** menu, then use the **Close** button, which appears next to the **Planning Unit Details** button, to close the Manage Approvals panel and return to the Smart View Home panel.

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.

To filter the list of planning units:

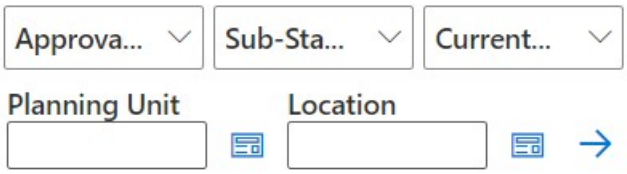
1. Open the appropriate form.
2. From the Planning ribbon, select **Approvals**, to open the **Manage Approvals** panel.

   Alternatively, you can also click the **Actions** menu in the Smart View Home panel and select **Approvals**.

3. In the **Manage Approvals** panel, select a **Scenario** and **Version**.
4. Click to display the list of planning units to which you have access.
5. Click to enable filtering.

   If this option is not seen in the toolbar, click the ellipses menu to locate the option.

   The filter options, which contains filtering tools, are displayed just above the planning unit list; for example:



6. Perform one of the following procedures:
   - **Search**

     To search for a specific planning unit, enter its name in the **Planning Unit** field.
   - **Use the Auto filters**

     From the **Approvals Status**, **Sub-Status**, and **Current Owner** lists, select the required filter values.
   - **Filter by member selection**

     a. Click , next to the **Planning Units** field or the **Location** field, and then select members for the planning unit list or location list.

     b. In the **Member Selector** dialog, select the required members and click **Done**. You can further filter on planning units or location by making selections in **Approvals Status**, **Sub-Status**, and **Current Owner** lists.
7. Click to apply the filters.

   The list of planning units is reloaded with the filtered units.

> **Note**
>
> To cancel the applied filters, click .

Changing Status of Planning Units

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

To view or change the status of a planning unit:

1. Open the appropriate form.
2. From the Planning ribbon, select **Approvals**, to open the **Manage Approvals** panel.

Alternatively, you can also click the **Actions** menu in the Smart View Home panel and select **Approvals**.

3. In the **Manage Approvals** panel, select a **Scenario** and **Version**.
4. Click  to display the list of planning units to which you have access.
5. Select a planning unit for which you want to change the status.
6. Click the ellipsis button, and then select **Change Status**,  .

> **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.

7. In the **Change Status** dialog, select an action and the next owner for the planning unit.
8. **Optional:** In the **Enter Annotation** field, enter an annotation for the planning unit.

   This annotation is seen in the **Planning Unit Details** section under the **Annotations** tab.
9. Click **Submit**.

   The status is updated and you can see it in the **Planning Unit Details** section under the **Approvals Status** tab.
10. **Optional:** To validate the changed planning unit, click  . You can validate only one planning unit at a time.

Viewing Promotional Path for Planning Units

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

Planning units move from person to person and department to department based on the following:

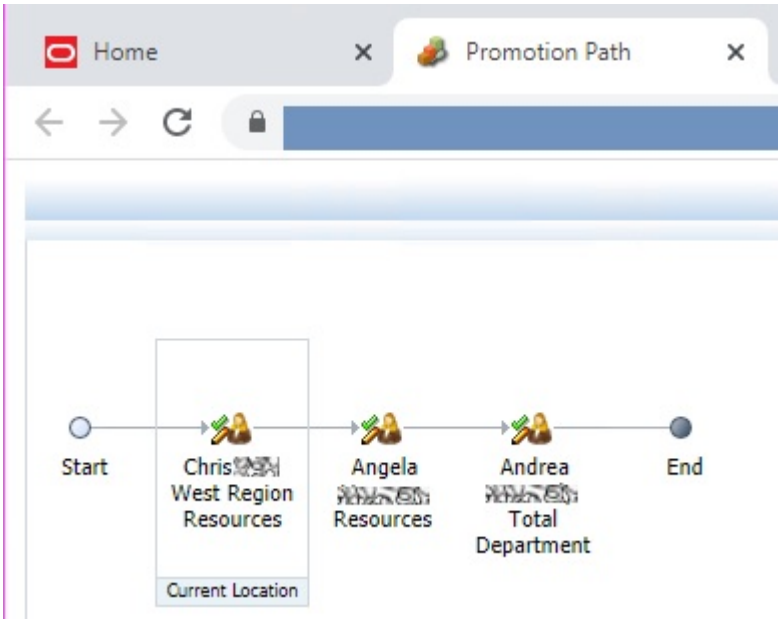
- The owners and reviewers assigned to the planning unit
- The planning unit place in the hierarchy

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

1. Open the appropriate form.
2. From the Planning ribbon, select **Approvals**,  to open the **Manage Approvals** panel.

   Alternatively, you can also click the **Actions** menu in the Smart View Home panel and select **Approvals**.
3. In the **Manage Approvals** panel, select a **Scenario** and **Version**.
4. Click  to display the list of planning units to which you have access.
5. Select a planning unit for which you want to view the promotional path.
6. Click  .

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



Adding Annotations for Planning Units

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

To add a planning unit annotation:

1. Open the appropriate form.
2. From the Planning ribbon, select **Approvals**, to open the **Manage Approvals** panel.

   Alternatively, you can also click the **Actions** menu in the Smart View Home panel and select **Approvals**.
3. In the **Manage Approvals** panel, select a **Scenario** and **Version**.
4. Click to display the list of planning units to which you have access.
5. Select the planning unit for which you want to add an annotation.
6. **Optional:** To view existing annotations for the selected planning unit, click **Planning Unit Details** and then click the **Annotations** tab.
7. Click .

   If this option is not seen in the toolbar, click the ellipses menu to locate the option.
8. In **Approvals - Add Annotation**, enter a title and annotations.

   In the **Enter Annotation** 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.
9. Click **Submit**.

Setting up an 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.

With the Out of Office Assistant, you can set the following actions that can be automatically taken on planning units assigned to you while you are away.

- Promote: The planning units are promoted to the next owner or level in the promotional path.
- Reject: The planning units are rejected and returned to the previous owner.
- Delegate: The planning units are delegated to a user of your choice.
- Submit: The planning units are submitted.

To set up the Out of Office Assistant:

1. Open the appropriate form.
2. From the Planning ribbon, select **Approvals**,  to open the **Manage Approvals** panel.

   Alternatively, you can also click the **Actions** menu in the Smart View Home panel and select **Approvals**.
3. In the **Manage Approvals** panel, click **Out of Office Assistant**,  .
4. In the **Out of Office Assistant** dialog, select the **I am currently out of office** check box.
5. Select an action and the next owner to manage the planning units that arrive while you are out of the office.

   For example, if you select the **Delegate** option, select the owner to whom the planning units must be delegated from the **Select Next Owner** list.
6. **Optional:** In the **Enter Annotation** field, enter an annotation for the planning units.

   This annotation is seen in the **Planning Unit Details** section under the **Annotations** tab.
7. Click **Submit**.

14

Task Lists

Related Topics

- About Task Lists
  Open and manage tasks from the Smart View panel in Excel.
- Opening a Task List
  Open a task list to view its details and take actions.
- Viewing the Task List
  View the details of individual tasks in the task list, take action on them, and track the overall completion status of the task list.
- Executing a Task
  Execute incomplete tasks as per their requirements.
- Completing a Task
  Mark a task complete after completing its requirements.
- Creating Task List Reports
  Create and download a task list report on the task-wise and overall completion status of the task list.

About Task Lists

Open and manage tasks from the Smart View panel in Excel.

Applies to: Planning

You can open and manage tasks from the Smart View panel in Excel.

Task lists help you organize, track, and prioritize your workload. For example, a task might help you complete forms, launch business rules, or promote approval units. Through tasks, you can also launch a website or internal company page.

You can open and view task lists, execute and complete tasks, and create task list reports from the Task List panel. Service Administrators manage and assign access permissions for task lists. For more information, see the administration documentation for your data source.

Video

Your Goal	Watch This Video
Learn about task lists. In this video, task lists concepts are shown in Smart View (Windows), but many of the concepts apply to Smart View (Mac and Browser).	 Managing Task Lists in Smart View with Oracle Planning and Budgeting Cloud

Opening a Task List

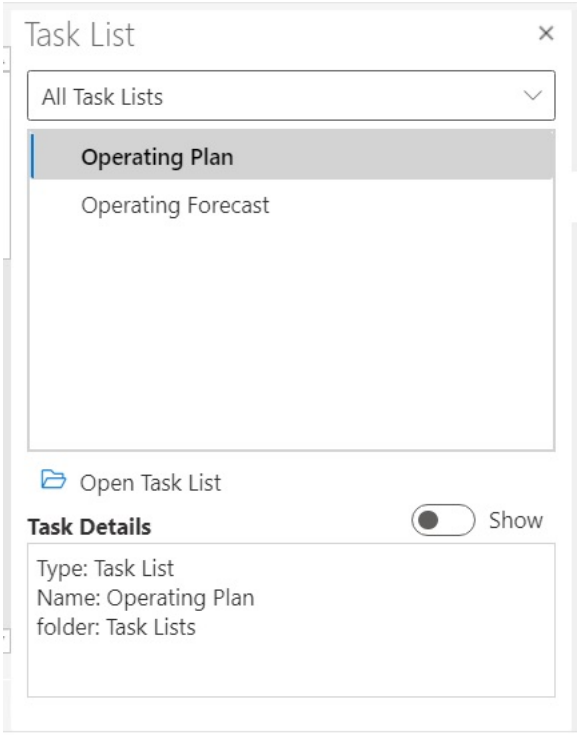
Open a task list to view its details and take actions.

To open a task list from Smart View:

1. Connect to your data provider.
2. Open a form or ad hoc grid.

   You must have a form or ad hoc grid open on the sheet before you begin working with task lists.
3. From the Smart View Home panel, click the **Actions** menu and then click **Task List**, .

   This opens the Task List panel:



   In the Task List panel, use the **Show/Hide** toggle button to display or hide the **Task Details** pane.

   Available commands for tasks appear in the Action Panel, just below the task list tree view pane and above the **Task Details** pane.
4. From the Task List panel, select a task list, and then click **Open Task List** on the Action Panel.
5. Continue with Viewing the Task List.

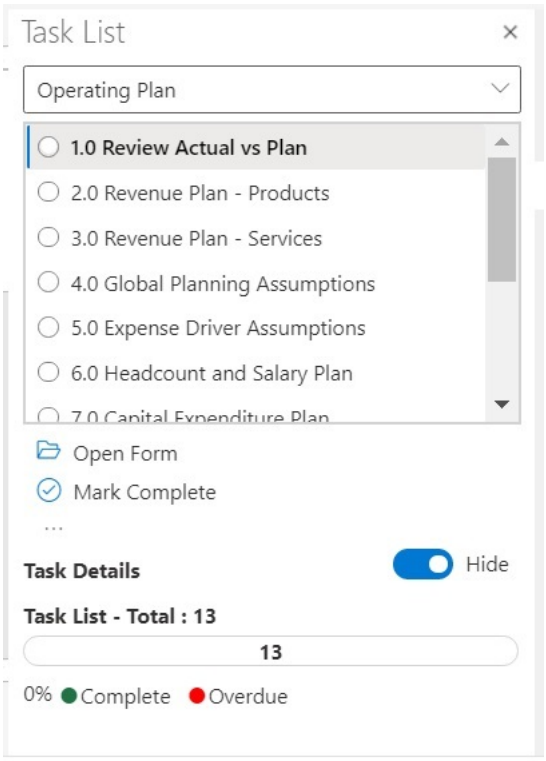
Viewing the Task List

View the details of individual tasks in the task list, take action on them, and track the overall completion status of the task list.

A task list in the Task List panel displays the following:

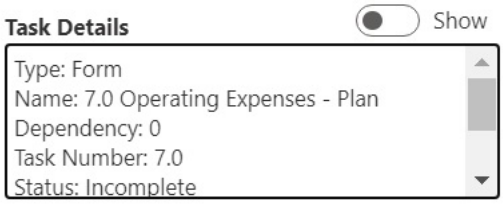
- The individual tasks in the task list. These may contain subordinate tasks. The status of the task – complete, incomplete, or overdue – is indicated by color-coding.

  For example:



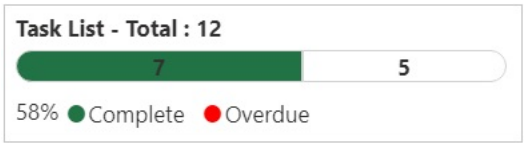
- **Task Details** gives you details for the selected task in the task list, including the task status.

  For example:



  Use the **Show/Hide** toggle button to display or hide the **Task Details** pane.

- A status bar gives you a high-level view of the status of your task list. The status bar, located at the bottom of the Task List panel, shows you the number of tasks in the task list, the number of completed tasks along with a percentage of completed tasks for the task list, and the number of tasks to complete; for example:

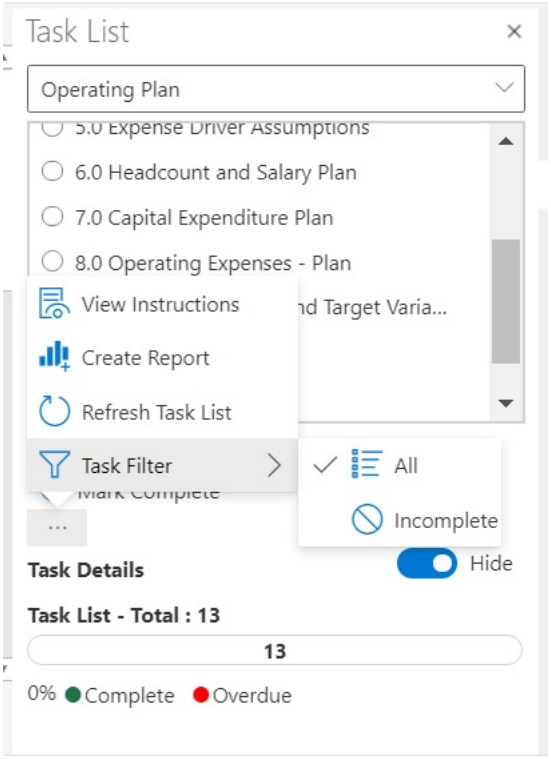


- The Action Panel displays the actions that are available for the selected task

  In the example above, the **Open Form** and **Mark Complete** commands are available, along with the ... .

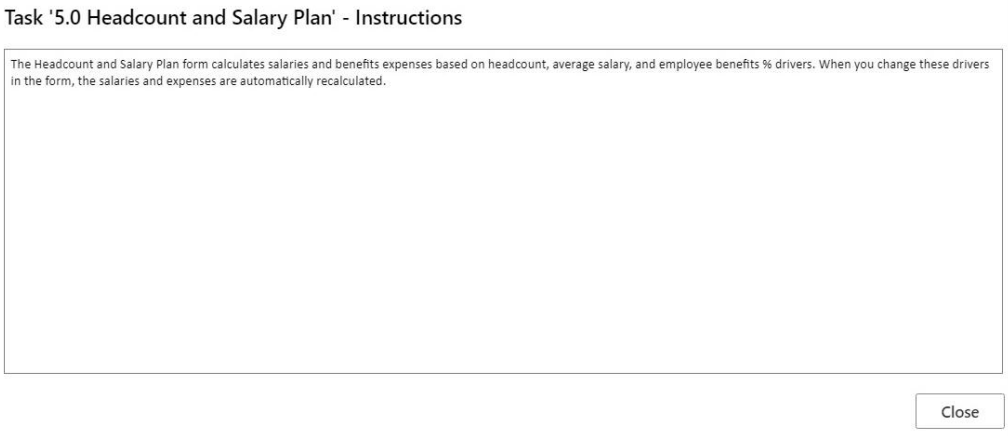
Similarly, for tasks with business rules, the **Launch Rule** command appears for selecting and running business rules from the task list itself, while the **Open URL or File** command appears for tasks that launch links or open files.

- The **More items** button, ... lets you access a drop-down menu with more commands for the selected task:



These actions are available:

– **View Instructions**: To view instructions for a task, click the **More items** button, ..., and then select **View Instructions**. A dialog with information specific to the task is displayed; for example:

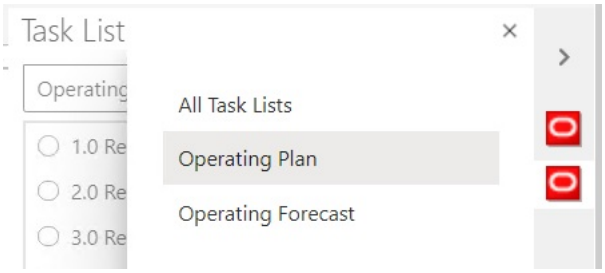


– **Create Report**: See Creating Task List Reports.

  - **Refresh Task List**: Click to refresh the task list, incorporating any new tasks added to the list, and updating the status bar.
  - **Task Filter**: Click to view the submenu. Select **Incomplete** to view only incomplete tasks in the task list. Select **All** to view the entire task list.

- A drop-down menu at the top in the Task List panel lets you select other task lists associated with the current application; for example, click the arrow:

View the other task lists available for application. Task lists with overdue tasks display the number of overdue tasks in red color next to their name.



Executing a Task

Execute incomplete tasks as per their requirements.

To execute a task:

1. Open the task list that contains the task to execute.
2. From the Action Panel, click **Execute Task**.

   Task execution varies with the task and data source.

Completing a Task

Mark a task complete after completing its requirements.

To complete a task:

1. Complete the requirements of the task.
2. Open the task list that contains the task to complete.
3. Ensure that any dependent tasks are completed.
4. Select the task to mark complete.
5. From the Action Panel, click **Mark Complete**.

Creating Task List Reports

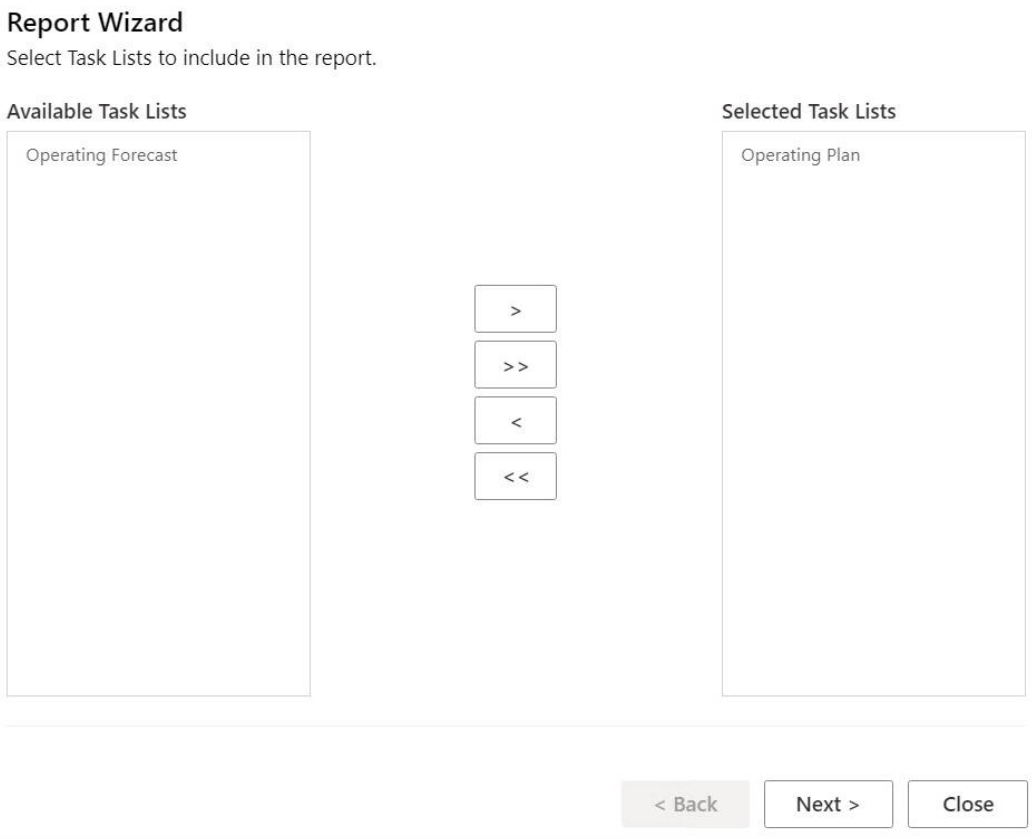
Create and download a task list report on the task-wise and overall completion status of the task list.

> **Note**
>
> In the initial release of Task Lists in Oracle Smart View for Office (Mac and Browser), reports are supported only when using Smart View on the Chrome browser.

To create a task list report:

1. Open a task list.
2. Select a task, then click ..., and then select **Create Report**.
3. In the **Report Wizard**, use the right and left arrow keys to move all task lists to be included in the report from **Available Task Lists** to **Selected Task Lists**.

   In the following example, the Operating Plan task list is selected for a report.



4. Click **Next**.
5. Use the right and left arrow keys to move the users whose status you want to include in the report from **Available Users** to **Selected Users**.

6. Click **Next**.
7. Select options to create your report.

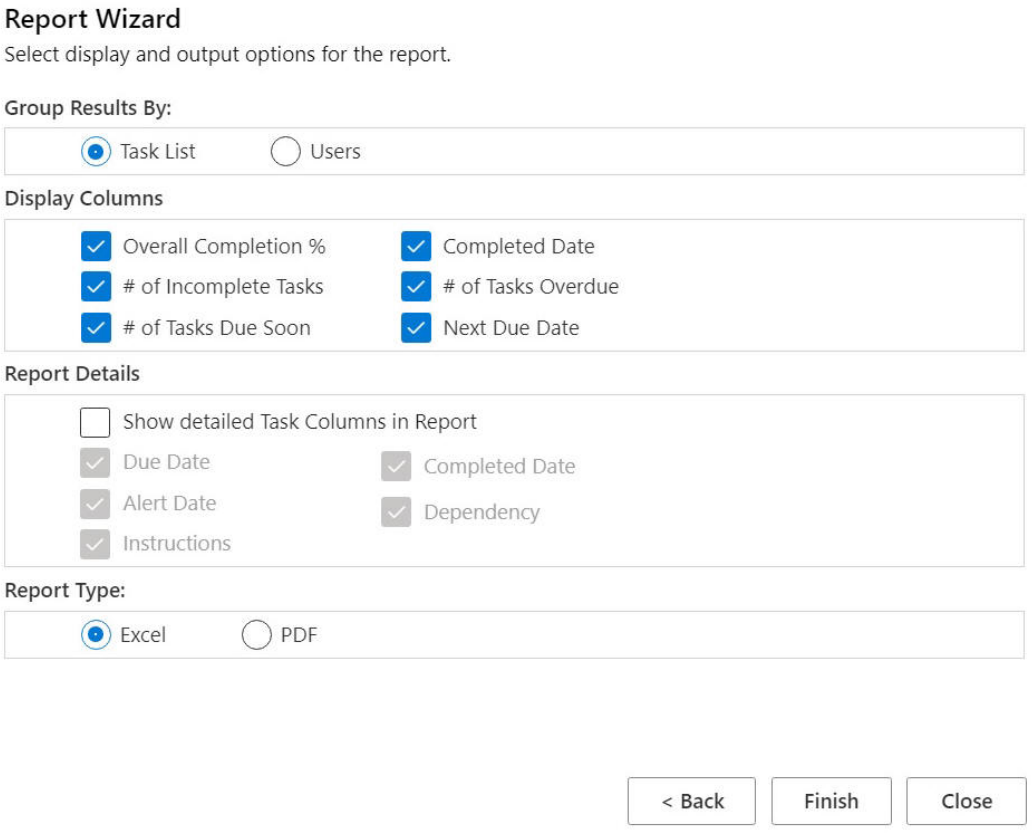
   Available options are:

   - **Group Results By**—Group the report output by Task List or by Users.
   - **Display Columns**—Use the check boxes to select the columns to display in the report.
   - **Report Details**—Use the check boxes to select the details to include in the report. All report details are selected by default.

     Select specific columns by first clearing the **Show Details Task Columns in Report** option and then clearing the individual report options that you do not require.
   - **Report Type**—Output type for the report: Excel or PDF.

     Selecting the report type as Excel downloads the report in an HTML file.

   In the following default example, results are groups by Task List, all display columns are selected, all report details are selected, and the report output type is Excel.



8. Click **Finish**, and then click **Close**.

   The report is created in the selected report type.

15

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 Smart View artifacts such as the POV, alias tables, and connection information.
- Setting User Preferences
  Set preferences for application settings, display settings, and user variables.

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
  You can specify the number of actions permitted for undo and redo. The setting takes effect after you refresh or perform a drill operation.
- Support for Undo in Cloud EPM

About Using Undo and Redo

When using **Undo** and **Redo**, consider the following guidelines:

- 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

You can specify the number of actions permitted for undo and redo. The setting takes effect after you refresh or perform a drill operation.

To specify the number of permitted undo and redo actions:

1. From the **Smart View** ribbon, select **Options**.
2. In the **Advanced** tab, in **Number of Undo Actions**, specify the number of permissible **Undo** operations, 0 through 100.

Support for Undo in Cloud EPM

Table 15-1 Undo Operations Supported by Cloud EPM - Ad Hoc Options

Operations	Form	Ad Hoc	Functions
Zoom In	N/A	Supported	N/A
Zoom Out	N/A	Supported	N/A
Keep Only	N/A	Supported	N/A
Remove Only	N/A	Supported	N/A
Pivot	N/A	Supported	N/A
Refresh	N/A	Supported	N/A

Table 15-2 Undo Operations Supported by Cloud EPM - Member Options

Operations	Form	Ad Hoc	Functions
General	**General**	**General**	**General**
Zoom In Level	N/A	Supported	N/A
Member Name Display	N/A	Supported	N/A
Indentation	N/A	Supported	N/A
Ancestor Position	N/A	Supported	N/A
Member Retention	**Member Retention**	**Member Retention**	**Member Retention**
Include Selection	N/A	Supported	N/A
Within Selected Group	N/A	Supported	N/A
Remove Unselected Groups	N/A	Supported	N/A
Comments and Formulas	**Comments and Formulas**	**Comments and Formulas**	**Comments and Formulas**
Preserve Formulas and Comments	N/A	Supported	N/A

Table 15-3 Undo Operations Supported by Cloud EPM - Data Options

Operations	Form	Ad Hoc	Functions
Data Options	**Data Options**	**Data Options**	**Data Options**
Rows	**Rows**	**Rows**	**Rows**
Suppress No Data/Missing	N/A	Supported	N/A
Zero	N/A	Supported	N/A
No Access	N/A	Supported	N/A
Invalid	N/A	Supported	N/A
Underscore Characters	N/A	Supported	N/A
Repeated Members	N/A	Supported	N/A
Columns	**Columns**	**Columns**	**Columns**
Suppress No Data/Missing	N/A	Supported	N/A
Zero	N/A	Supported	N/A

Table 15-3 (Cont.) Undo Operations Supported by Cloud EPM - Data Options

Operations	Form	Ad Hoc	Functions
No Access	N/A	Supported	N/A
Mode	**Mode**	**Mode**	**Mode**
Suppress Missing Blocks	N/A	Supported	N/A

Table 15-4 Undo Operations Supported by Cloud EPM - Other Actions

Operations	Form	Ad Hoc	Functions
Modify Open Saved	N/A	Not Supported	N/A
Alias Table	N/A	Supported	N/A
Metadata (member data)	N/A	Not Supported	N/A
Cell Style	N/A	Not Supported	N/A

Sheet Information

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

Related Topics

- Guidelines on Sheet Information
  Consider the guidelines in this topic when using sheet information.
- Viewing Sheet Information
  You can view useful information about the sheet such as connection details, connection status, sheet type, and last connected date and time. You can also save this information to an html file or delete the sheet's metadata, if not required.
- Support for Sheet Information in Cloud EPM

Guidelines on Sheet Information

Consider the guidelines in this topic when using sheet information.

- You can see separate **Connection** sections in the **Sheet Info** dialog box for each valid grid present on the sheet. For example, Connection (Grid 1), Connection (Grid 2), and so on.
- In a multiple-grid sheet, if all the grids are connected to the same connection, then you can view their details such as Server, Application, URL, Provider, Alias Table, and Associated Range in their respective **Connection** section.
- In a multiple-grid sheet, if any of the grids are connected to a different connection than the one from which the **Sheet Info** dialog box is launched, you can see only the following limited details in the **Connection** section:
  - **Associated Range:** Name of the cell ranges associated with the grid
  - **Information:** Message indicating *"The grid is associated with a different connection"*.

  For example, you are working on a sheet with Grid 1 and Grid 2 connected to Planning and Grid 3 connected to Tax Reporting. If you launch the **Sheet Info** dialog box using the **Sheet Info** option on the Smart View ribbon for Tax Reporting, you can see full details for Grid 3, including server, application, URL, provider and so on. However, for Grid 1 and 2, you only see the associated range name and an informational message stating *"The grid is*

associated with a different connection". To view the sheet information for Grid 1 and 2, use the **Sheet Info** option on the Smart View ribbon for Planning.

- In a multiple-grid sheet, if you rename a grid range or delete its original name using Excel's Name Manager, instead of Smart View's **Rename Grid Range** option, then Smart View considers such a grid as invalid. This is because the grid's connection is broken, thus preventing Smart View from identifying it. You cannot view details of such a grid in the **Sheet Info** dialog box and cannot perform any grid operations on such a grid.
  It is recommended to always use Smart View's **Rename Grid Range** option for giving friendly or understandable names to your grids. For more information, see Renaming Grid Ranges.
- For a Function sheet, the **Sheet Info** dialog box only displays the **Sheet Type** as *Function*. No other description is available for display for a Function sheet.

Viewing Sheet Information

You can view useful information about the sheet such as connection details, connection status, sheet type, and last connected date and time. You can also save this information to an html file or delete the sheet's metadata, if not required.

To view sheet information:

1. From the Smart View ribbon, select **Sheet Info**.

   If you see a notification indicating that Smart View wants to display a new window, click **Allow**.

   Ensure that you are connected to your data source, else the **Sheet Info** dialog will not open.

2. Depending on the data on the sheet, view the following information displayed in the **Sheet Info** dialog box:

   - **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 Fusion Cloud Enterprise Performance Management applications.
     - **Associated Range:** Name of the cell range associated with the grid. If you have renamed the grid range using Smart View's **Rename Grid Range** option, then you can view the new name here.
     - **Information:** If a grid is connected to a different connection than the one from which the **Sheet Info** dialog box is launched, this field displays a message indicating *"The grid is associated with a different connection"*.

> **Note**
>
> For multiple-grid sheets, you can see separate **Connection** sections for each valid grid present on the sheet. For example, Connection (Grid 1), Connection (Grid 2), and so on.

- **General**
  - **Sheet Type:** Form, Ad hoc, Multiple grid ad hoc, or Function

> **Note**
>
> For a Function sheet, the **Sheet Info** dialog box only displays the **Sheet Type** as *Function*. No other details are available for display for a Function sheet.

  - **Last Retrieved:** Date and time when the sheet was last refreshed

3. 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 sheet.
     - **Delete workbook metadata** deletes all Smart View metadata in the active workbook.

> **Note**
>
> The Delete operation cannot be undone.

   - **Save:** Saves the sheet information content to an HTML file.
4. Click **Close** to close the **Sheet Info** dialog box.

Support for Sheet Information in Cloud EPM

Without connecting to a data source, if you open a new blank sheet or a saved sheet and launch the **Sheet Info** dialog, it displays the **Sheet Type** information as *Empty*. No other details are available for display without establishing a connection for the sheet.

Once connected to a data source, the Sheet Information is supported as follows for various artifacts as per different connection scenarios.

> **Note**
>
> For a Function sheet, the **Sheet Info** dialog only displays the **Sheet Type** as *Function*. No other details are available for display for a Function sheet.

Table 15-5 Sheet Information Supported by in Cloud EPM

Connection Status	Form	Ad Hoc	Smart Form	Rules	Functions
Set Active Connection for this Worksheet	Yes	Yes	Yes	Yes	No
Set as Default Connection, before associating with active connection	N/A	N/A	N/A	N/A	N/A
Set as Default Connection, after associating with active connection	Yes	Yes	Yes	Yes	No
Last Retrieved	Yes	Yes	No	No	No

Importing Metadata

You can import metadata into copied worksheets. Metadata consists of Smart View 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

In a new Excel sheet, you may want to make use of Smart View content in an existing sheet that contains not only the formatting and layout that you need, but metadata as well. Metadata consists of Smart View artifacts such as the POV, alias tables, and connection information. Instead of recreating the Smart View content from scratch, you can reuse the work that is already available.

When you use the Excel copy and paste commands to copy Smart View content within or between sheets, the static data and formatting is copied; but the Smart View metadata is not copied in the new sheet. For example, if you open Sheet Information in the new sheet, it does not show any connection details and displays the Sheet Type as Empty.

By using the **Import Metadata** command, after the data is copied, you can import the metadata from the original sheet into the new sheet in the same workbook. Now if you open Sheet Information for the new sheet, you can see the same connection details and Sheet Type as the original 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

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

> **Note**
>
> Once the metadata from a source sheet is imported in a destination sheet, 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. Open the destination sheet.
4. With the destination worksheet active, from the Smart View ribbon, select **More** and then **Import Metadata** to display a list of all open workbooks and their corresponding open worksheets.
5. From the list, select the worksheet that contains the metadata that you want to import to the destination worksheet.
6. Click **OK**.

   A warning message appears informing that the metadata in the destination or the active sheet will be overwritten with the metadata from the source sheet. This operation cannot be undone.
7. Click **Yes** in the warning message.
8. Click **Refresh**.

Setting User Preferences

Set preferences for application settings, display settings, and user variables.

Applies to: Cloud EPM data source providers

To set user preferences for an Oracle Fusion Cloud Enterprise Performance Management application:

1. From the tree list in the Smart View Home panel, select a cube or open a form or ad hoc grid.
2. At the prompt, select an option:
   - **Ad hoc analysis**—Places the initial default ad hoc grid on the sheet
   - **Set Active Connection for this Worksheet**—Sets the active connection for the worksheet only, without placing a grid on the sheet.

   You can also access **User Preferences** from an open form or ad hoc grid.
3. From the Smart View Home panel, click the **Actions** menu and then click **User Preferences**.

   User Preferences appears as a panel with three tabs: **Settings**, **Display**, and **Variables**.
4. From the **User Preferences** panel, click a tab and perform an action:

- **Settings** tab—Manage email options, specify alias settings, set workflow options for approvals, and specify out of office settings for planning units.
  - Select a check box on the right to use the default application setting for an option.
  - Select a check box on the left to override the default application settings.
  - For **Alias Table**, select an alias table from the drop-down list on the left to override the default application settings, and then select the check box on the left.

> **Note**
>
> Changes to the alias table require you to restart Smart View and reconnect to take effect.

- **Display**—Set number formatting for thousand separator, decimal separator, negative sign, and negative color; Set page options to remember selected page members, allow a search if the number of pages exceeds a number you specify, and set member indentation; Set other options to display consolidation operators, specify number of members on each page and record, and set date format.
  - Select a check box on the right to use the default application settings.
  - For each available property on the left, select an option from the drop-down list or type directly into the text box to override the default application settings.
- **Variables**—Variables set up by the administrator to help you navigate large forms and grids.

  The left column displays the user variable name. The associated dimension is displayed below user variable name. Click the ellipses icon to launch the **Member Selection** dialog. Then select a member to use as the default for the user variable.

> **Note**
>
> User preferences for locale, date format, and decimal/numeric format set on forms from within the web application are not honored on forms in Smart View.

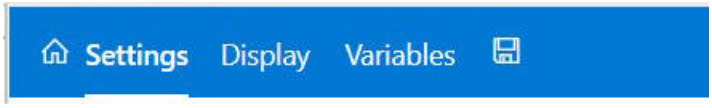
5. After making changes in a tab, click **Save**,

   at the top of the **User Preferences** panel before selecting another tab.
6. When you're finished setting user preferences, click

   in the panel to close.



16

Functions

Related Topics

- About Functions
  You can use supported functions in Smart View to retrieve and send data in specific cells in Excel sheet.
- Creating Functions
  You can create functions manually or by using the Function Builder.
- Running Functions
  You can run most Smart View functions automatically using **Refresh** commands.
- Specifying a Label for Missing Data in Functions
  Set a value for missing data in user-defined functions, such as HsGetValue or HsSetValue, using the **Missing Label** option in the **Options** panel.
- Fixing Links in Functions
  You may need to fix broken links in functions.
- Function Descriptions
  Smart View supports the functions listed here. Click a function name to access description, syntax, and examples.
- Common Function Error Codes
  These are some common error codes displayed in functions.

About Functions

You can use supported functions in Smart View to retrieve and send data in specific cells in Excel sheet.

If you are familiar with the contents of your database, you can use Smart View functions to perform operations on specific data in Excel cells.

In Smart View, you can use the Function Builder panel to add functions to cells on a sheet, or enter functions manually into cells on the sheet, providing a connection name and the POV, and then retrieve data upon refresh.

The following functions are supported in Smart View.

Table 16-1 Smart View Functions and Supported Providers

Function	Description	Supported Providers
HsGetValue	Used to create static reports which can then be formatted as required by retrieving application data into specific cells.	• Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting • Oracle Essbase

Table 16-1 (Cont.) Smart View Functions and Supported Providers

Function	Description	Supported Providers
HsSetValue	Used to send a data value from a worksheet to a data source based on selected members of dimensions.	• Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting • Oracle Essbase
HsAlias	Used to display the alias of the specified dimension member.	• Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting
HsGetSheetInfo	Used to retrieves detailed information about the current sheet, one sheet property at a time.	• Planning • Planning Modules • Financial Consolidation and Close • Tax Reporting • Oracle Essbase

Guidelines for Using Functions

Consider the following guidelines while using functions in Smart View:

- Functions are validated only upon refresh.
- If any function is invalid, then all functions on the sheet, including valid functions, will display #Error. For example, an invalid dimension or member name will result in an invalid function. Review functions for errors and correct them, and then refresh the sheet again.

Administrators: To implement functions for Oracle Smart View for Office (Mac and Browser) users, Service Administrators deploy a manifest file with the "Include Functions support" option enabled, described in *Deploying and Administering Oracle Smart View for Office (Mac and Browser)*. Before sideloading a new manifest or deploying it to users, all users must clear their browser cache.

Creating Functions

You can create functions manually or by using the Function Builder.

Related Topics:

- Creating Functions in the Function Builder
- Creating Functions Manually

Creating Functions in the Function Builder

In the Function Builder, you select a function and specify the connection and members that you want the function to use.

The Function Builder then creates the function using the proper syntax and enters it into the selected cell. You can edit these functions.

The selections available to you in a given Function Builder field are limited by your selections in other fields of the Function Builder. For example, only the connections supported by the selected function are displayed, and only the dimensions supported by the function you select are displayed.

A cell reference can be selected for each function argument. Type-in functionality is available for each argument.

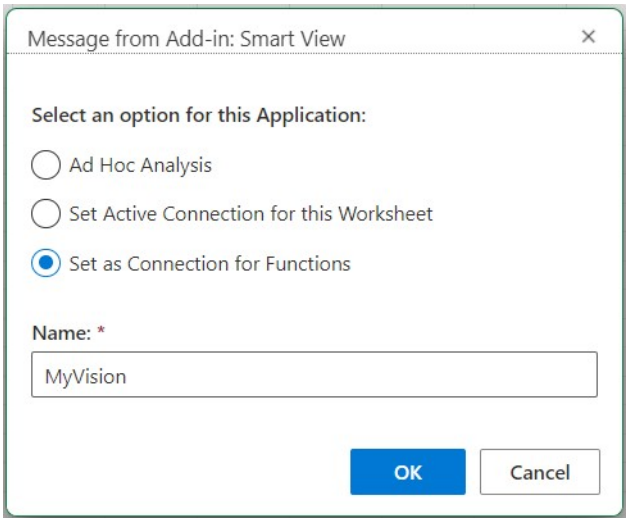
To create functions using the Function Builder:

1. Connect to a data source.
2. Select a cube and, in the connection dialog that displays, select **Set as Connection for Functions**, then type a name for the connection, and then click **OK**.

   In the below example, the connection name is **MyVision**.

> **Note**
>
> You must create a connection name for each *new* workbook.
>
> The connection name is saved with the workbook. When you reopen the saved workbook, you will not be prompted to enter a connection name.

Figure 16-1 Connection Option and Name

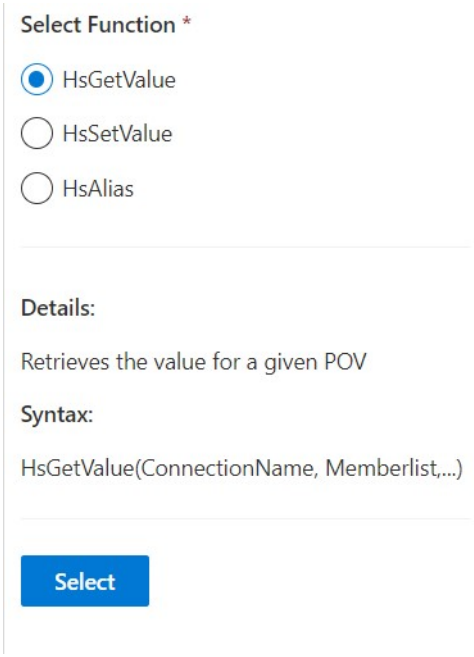


3. In the sheet, select the cell in to which you want to enter the function.
4. In the Smart View ribbon, click **Functions** and then click **Build Function**, , to launch the Function Builder panel.
5. In the **Function Builder** panel, choose a function from the list and then click **Select**.

> **Note**
>
> Currently, Smart View supports these functions:
>
> - HsGetValue
> - HsSetValue
> - HsAlias
> - HsGetSheetInfo
>
> For detailed explanation of these functions, see Function Descriptions.

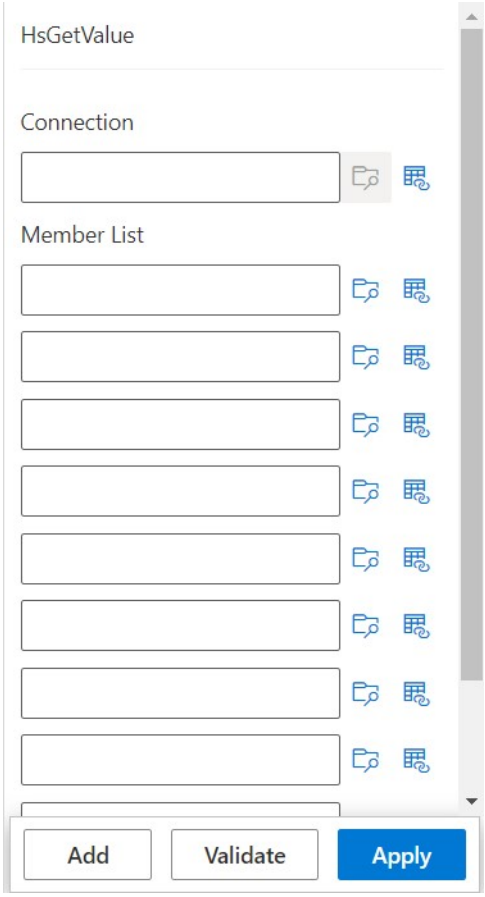
In the below example, the HsGetValue function is selected.

Figure 16-2 Function Builder Panel, Supported Functions List



After clicking **Select**, the selected function's panel is displayed in the **Function Builder**. The following example displays the fields for HsGetValue in the Function Builder. These fields vary based on the selected function.

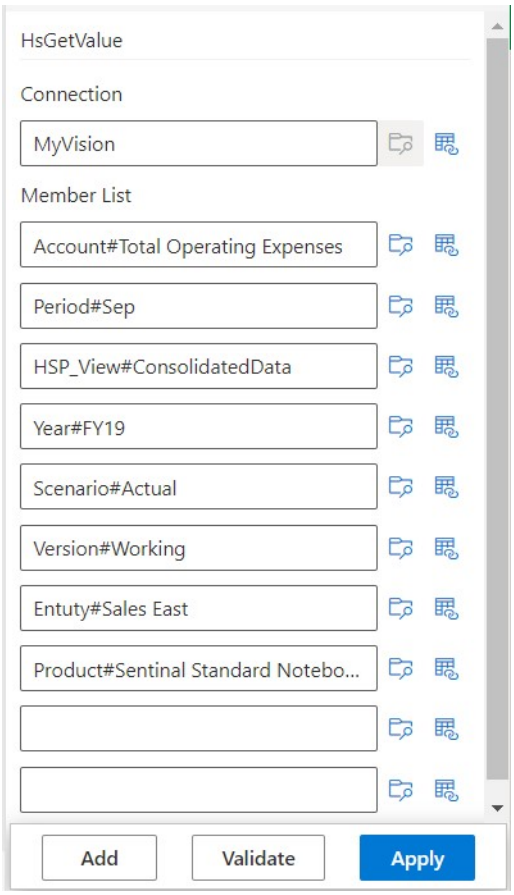
Figure 16-3 Function Builder Panel, Member List



6. **For HsGetValue:**
   a. In **Connection**, enter the connection name you specified in step 2.
   b. In **Member List**, add an argument for each dimension in the cube using any of the following methods:
      - Click the **Select Member** button, , next to the argument text box, and in the **Member Selector**, select a dimension and member. Repeat for each dimension in the cube.
      - Enter the argument manually by typing the dimension and member pair in the text boxes using the format: dimension#member. For example, Year#Qtr1 or Year#Jan. Repeat for each dimension in the cube.
      - To use cell references, follow the procedure in Using Cell References.

      The following example displays a completed Member List for the HsGetValue function.

Figure 16-4 Function Builder panel for HsGetValue based on the Planning Vision Sample Database



c. **Optional:** To add more rows in the **Member List**, click **Add**.

7. **For HsSetValue:**
   a. In **Value**, enter the value that you want to set.
   b. In **Connection**, enter the connection name you specified in step 2.
   c. In **Member List**, add an argument for each dimension in the cube.
   d. **Optional:** To add more rows in the **Member List**, click **Add**.
8. **For HsAlias:**
   a. In **Connection**, enter the connection name you specified in step 2.
   b. Enter the values in the **Member Name**, **Destination Alias**, **Source Alias**, and **Distinct Name** fields.
9. **For HsGetSheetInfo:** Select a property from the **Sheet Property** list.
10. Click **Validate** and correct any errors.

    Errors are noted in the **Function Builder** panel, next to the problem areas.

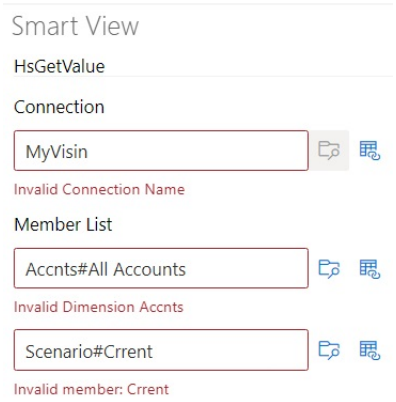
    Some of the errors that you may see are:

    - Connection offline or invalid
    - Invalid selection
    - Member name is invalid or not matching selected alias

- Dimension name is invalid or not matching selected alias
- Incomplete Dimension#Member combination
- Generic "Error" in cases of missing quotation marks or other minor syntax errors

For example, Function Builder Validation Errors shows simple spelling errors that resulted in an invalid Connection name, an invalid dimension name in one argument, and an invalid member name in another argument.

Figure 16-5 Function Builder Validation Errors



> **Note**
>
> Validate only works with dimension#member combinations that are hand-typed into the text boxes and does not apply to those dimension#members that are added using the **Member Selector** dialog. If all dimension#member combinations are entered using the **Member Selector**, then no validation messages regarding those combinations are displayed. You may still see an error regarding the connection name if it is misspelled.
>
> - If the connection name is correct and all the other dimension#member combinations were added using the **Member Selector** dialog, then a *"Validation successful"* message will not display.
> - If the connection name is correct and one or more dimension#member combinations were hand-typed correctly, then a *"Validation successful"* message will display.

11. Resolve the errors and click **Validate** again.

    When the function validates correctly, a message appears stating that validation is successful.

12. Click **Apply**.
13. To execute the function, follow the procedure in Running Functions.

Using Cell References

You can enter references to single cells for connection, label, data/text, or variable arguments.

To use cell references:

1. Follow the steps in Creating Functions in the Function Builder to open the **Function Builder** panel.
2. In the **Function Builder** panel, for each argument in the selected function, select the cell in the sheet to reference, and then click the **Cell Reference** button, .

   You can also hand type the cell reference using the following syntax:

   ""&<column letter><row number>&""

   For example:

   ""&A3&""

   Notes:

   - If the member name that you selected in this step is displayed as dimension#member in the grid, then the argument selection is complete. For example, if the member is displayed in the grid as Year#Qtr 2 in cell A3, then ""&A3&"" is complete.

     If only the member name is displayed in the grid, then you must manually enter the dimension name followed by # between the first two sets of double quotation marks. For example, if the member is displayed as Qtr2 in cell A3, then you must enter Year# between the quotation marks: "Year#"&A3&""
   - If an argument text field contains text before you select a reference cell, the cell reference text is appended to this text. Therefore, delete any unwanted text in the field before selecting a cell for reference.
   - If a date cell is directly referred as input, then convert the input to the proper text format using a Text function as follows; in this example, cell B3 contains a proper date:

     =HsSetValue(TEXT(B3,"dd/mm/yyyy"),"ConnectionName", "dim#member"…)
3. When you have finished entering cell references, click **Apply**.
4. Refresh the sheet.

Creating Functions Manually

You can create functions manually in Smart View.

See the Microsoft documentation and support site for information about character and other Excel function limitations.

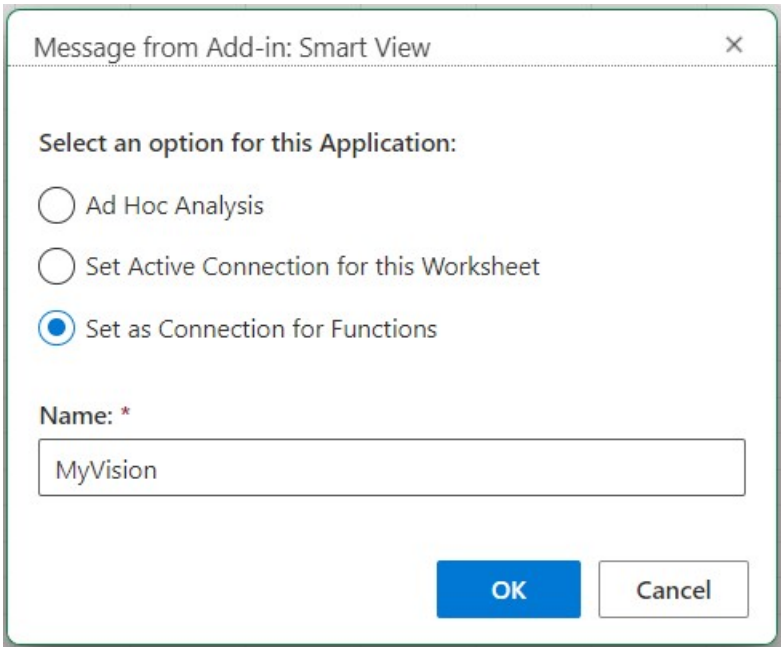
To create a function manually in Smart View:

1. Connect to a data source.
2. Select a cube and, in the connection dialog that displays, select **Set as Connection for Functions**, and then type a name for the connection, and then click **OK**.

   In the below example, the connection name is **MyVision**.

> **Note**
>
> You must create a connection name for each *new* workbook.
>
> The connection name is saved with the workbook. When you reopen the saved workbook, you will not be prompted to enter a connection name.

Figure 16-6 Connection Option and Name



3. In the sheet, click the cell in which you want to enter the function.
4. Enter an equals sign and then type the function name; for example:

   ```
   =HsSetValue
   ```

5. Enter parameters for the function according to rules described in Syntax Guidelines, using the information specific to each function in Function Descriptions.
6. To add functions to other cells in the sheet, repeat steps 4 through 6
7. To run the functions, refresh the sheet.

   Functions are validated only upon refresh.

   If any function is invalid, then all functions on the sheet, including valid functions, will display #Error. For example, an invalid dimension or member name will result in an invalid function.

   Review the functions for errors and refresh the sheet again.

Syntax Guidelines

Use the following guidelines to enter parameters for functions.

See Function Descriptions for the syntax of individual functions.

- The connection parameter is the user-defined name for a connection.

  The connection parameter must precede the POV.
- The POV is composed of *dimension#member* pairs, for example:

  ```
  Entity#Connecticut
  ```
- Parent-child relationships are designated by a period, (.); for example:

  ```
  Entity#UnitedStates.Maine
  ```
- The connection and each POV *dimension#member* pair can be split into separate function parameters, each parameter enclosed in quotation marks, ("), and separated by a comma, (,); for example:

  ```
  "MyVision","Entity#UnitedStates","Account#Sales"
  ```

  The use of semicolons (;) as the dimension#member parameter separator is not supported.
- If a POV dimension#member is not specified, then Smart View adds the top level member of that dimension to the function. For example, in the following HsGetValue function, there is no Period dimension and member specified:

  ```
  =HsGetValue("MyVision","Account#Amount","Years#2017","Scenario#Annual,
  Contract","Version#Final","Entity#AR02-
  Argentina-,IS_Adjustments","Package#Depreciation","Currency#Local Currency")
  ```

  In this case, Smart View will add the top-level Period member, which is Period, to the function, Period#Period. For example:

  ```
  =HsGetValue("MyVision","Account#Amount","Period#Period","Years#2017","Scenario#Annual
  Contract","Version#Final","Entity#AR02-Argentina-
  IS_Adjustments","Package#Depreciation","Currency#Local Currency")
  ```
- Do not mix a dimension name and its aliases in functions. However, for members, you can either use the member name or its alias from the selected alias table.
- Enclose text values in quotation marks, (") when using them in HsSetValue function. For example:

  ```
  HsSetValue("Enter Some Text", "MyVision","Account#7110:
  Advertising","Period#Jun","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Commentary","Enti
  ty#International Sales","Product#No Product")
  ```

Running Functions

You can run most Smart View functions automatically using **Refresh** commands.

For HsGetValue, use the **Submit Data** command.

To run functions and retrieve values:

1. Connect to a data source.
2. Open the sheet that contains the functions you want to run.

3. Do one of the following:
   - For HsSetValue, click **Submit Data**.
   - To run functions and update all the sheets in the workbook, click **Refresh**.

> **Note**
>
> When opening a workbook containing functions created on Oracle Smart View for Office, you will need to run the **Fix Links** command. See Fixing Links in Functions.

Specifying a Label for Missing Data in Functions

Set a value for missing data in user-defined functions, such as HsGetValue or HsSetValue, using the **Missing Label** option in the **Options** panel.

You can enter a value in the **Missing Label** field before performing any operations on the sheet, such as specifying a blank sheet for ad hoc analysis or for functions. This option is available immediately after connection when you open **Options**. You can also specify a value for the **Missing Label** option at any time.

To set the a value for the **Missing Label** option:

1. Connect to a data source.
2. **Optional:** Open a sheet that already contains functions.
3. In the Smart View ribbon, click the **Options** button to view the **Advanced** tab.

   At this point, only the **Advanced** tab is displayed in the **Options** panel; no other tabs are available.
4. In the **Advanced** tab of the **Options** panel, under **User-Defined Functions**, enter a value in the **Missing Label** text box.

   The default value is #Missing; however, you may specify a custom value and include special characters or capitalization, as you require.
5. Close the panel or, optionally, save this value for future use by clicking the **Save Current Options as Default** link, and then close the panel.
6. Proceed by adding functions to the sheet manually or using the Function Builder; or, proceed with operations in the sheet containing functions that you opened earlier.

Fixing Links in Functions

You may need to fix broken links in functions.

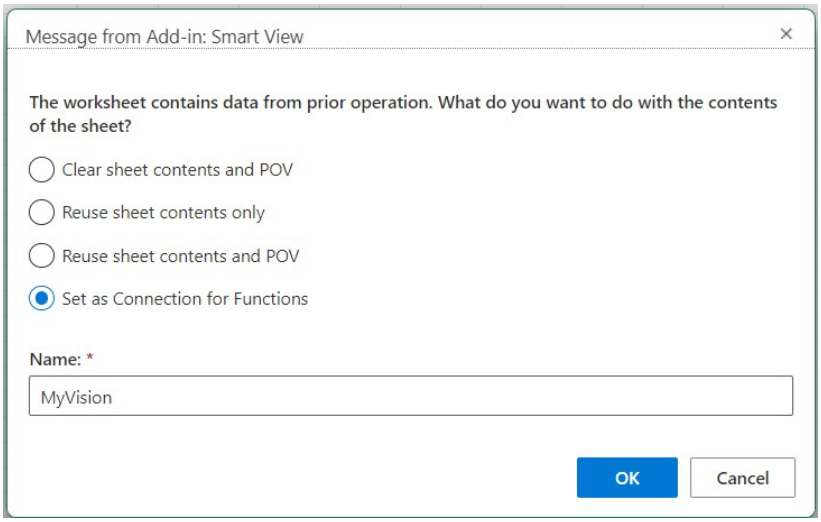
Broken links can occur in Oracle Smart View for Office (Mac and Browser), when you open a workbook containing functions that were created in Oracle Smart View for Office. Smart View functions (such as HsGetValue and HsSetValue) created in Smart View (Windows) make use of the HsTbar.xla file, located in the <SmartViewInstallLocation>/bin/ folder, and caches the path to this file. The Fix Links command cleans up such paths present in front of function names in the sheet. For example, a sheet created in Smart View (Windows) may contain a path like 'C:/Oracle/SmartView/bin/HsTbar.xla' before the function name when opened on a Mac. This path gets cleaned when you click **Fix Links**, so that the function can run properly.

> **Note**
>
> Currently, the Fix Links command is supported only when using Smart View (Mac and Browser) on a Mac.

To fix broken links in functions:

1. In Smart View (Mac and Browser), open the workbook containing functions that was created in Smart View (Windows), and connect to your data source using the instructions in Connecting to Data Sources.
2. In the Smart View ribbon, click **Functions** and then click the **Fix Links** button, .
3. Click **Refresh** to run the functions on the sheet.
4. If you see a #NoConnection message in the sheet, select the cube, select **Set as Connection for Functions**, and then enter a name for the connection.

   You can provide a meaningful name for the connection. The connection will automatically include information on the environment you're using, the application, and cube, and will be valid for all sheets in the workbook.



5. Close any Microsoft warnings or messages that display.

Function Descriptions

Smart View supports the functions listed here. Click a function name to access description, syntax, and examples.

- HsGetValue: Retrieves data from the data source for selected dimension members of a Point of View.
- HsSetValue: Sends a value to the data source for selected dimension members of a Point of View.
- HsAlias: Displays the alias of the specified dimension member.
- HsGetSheetInfo: Retrieves detailed information about the current sheet, one property at a time.

HsGetValue

Applies to: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Oracle Essbase

Description

HsGetValue retrieves data from the data source for selected dimension members of a Point of View (POV).

When HsGetValue retrieves no data, the value specified for the **Missing/No Data Label** replacement option is used (see Data Options).

When HsGetValue and HsSetValue are on the same sheet, and you select **Refresh**, only HsGetValue is called. If you select **Submit**, HsSetValue is called. If HsSetValue returns successfully, then you must then select **Refresh** to call HsGetValue.

HsGetValue supports the use of one attribute dimension and member with Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting data sources (see Example with Attribute).

Syntax

HsGetValue("*ConnectionName*","*POV*")

For detailed syntax information, see Syntax Guidelines.

Example 16-1 Example without Attribute

In this example, HsGetValue returns the value from the Vision application, Plan1 cube (represented by the MyVision connection name), for the specified POV.

```
=HsGetValue("MyVision","Account#Amount","Period#Jan","Years#2017","Scenario#Annual
Contract","Version#Final","Entity#AR02-Argentina-IS_Adjustments","Package#Depreciation","Currency#Local
Currency")
```

Example 16-2 Example with Attribute

In this example, HsGetValue returns the value from the Vision application, Plan1 cube (represented by the MyVision connection name), and the POV includes an attribute dimension and member, Entity_Regions#NA_Reg.

> **Note**
>
> HsGetValue supports only one attribute dimension and member per function.

```
=HsGetValue("MyVision","Account#Amount","Period#Jan","Years#2017","Scenario#Annual
Contract","Version#Final","Entity#AR02-Argentina-IS_Adjustments","Package#Depreciation","Currency#Local
Currency","Entity_Regions#NA_Reg")
```

HsSetValue

Applies to: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Oracle Essbase

Description

HsSetValue sends a data value from a worksheet to the data source for selected dimension members of a Point of View (POV). Attribute dimensions and members are not supported in HsSetValue.

To send data to a data source, you must have the appropriate load rule and have write access for the data source.

HsSetValue can also be used to send enumerated data types, such as Smart List, text, and dates.

> **Note**
>
> HsSetValue function should not be used to set value for a data cell containing supporting details. If used, the HsSetValue function cannot identify if a cell contains supporting details or not, and proceeds to update and submit the cell value with the new function-fetched value. This leads to an incorrect behavior. The original value continues to appear in the Supporting Details dialog box for the cell. So it is recommended not to use HsSetValue function to set value in cells with supporting details.

Syntax

HsSetValue (value,"*ConnectionName*","*POV*")

For detailed syntax information, see Syntax Guidelines.

Example 16-3 Basic Example

In this example, HsSetValue sends the value 123 to the Vision application (represented by the MyVision connection name).

```
=HSSETVALUE(123, "MyVision","Account#7110: Advertising","Period#x---------
x","HSP_View#BaseData","Year#FY19","Scenario#Forecast","Version#Driver","Entity#International
Sales","Product#No Product")
```

Example 16-4 Example with Text

Quotation marks are required when text is used for the value parameter in HsSetValue.

```
HsSetValue("Enter Some Text", "MyVision","Account#7110:
Advertising","Period#Jun","HSP_View#BaseData","Year#FY16","Scenario#Plan","Version#Commentary","Entity#In
ternational Sales","Product#No Product")
```

HsAlias

Applies to: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting

Description

HsAlias displays the alias of the specified dimension member.

> **Note**
>
> Function nesting is not supported for HsAlias. That is, HsAlias output cannot be referenced in another HsAlias function.

Syntax

```
HsAlias("PrivateConnectionName","Dimension#Member", "OutputAliasTable", "MemberNameFromAliasTable", "FlagToReturnDistinctName")
```

> **Note**
>
> For detailed syntax information, see Syntax Guidelines.

Example 16-5 Basic Example

```
HsAlias("MyVision","Scenario#Actual", "German", "Default", "True")
```

Notes

- The connection and Dimension#Member parameters are required.
- The OutputAliasTable parameter is optional. If OutputAliasTable is empty, then the connection level alias will be used for OutputAliasTable.
- It is optional to specify which alias table the member is from. If MemberNameFromAliasTable is empty, then the original member name from the outline will be used.
- If the member name is not found in the alias table specified in MemberNameFromAliasTable, then the original member name from the outline will be used.
- The HsActive keyword within the HsAlias function can only be used on a sheet with an ad hoc grid.
- Copy and Paste either from Smart View or Excel is not supported. Only static text will be pasted.
- The Boolean argument, FlagToReturnDistinctName, determines if the alias output is a short name or fully qualified name. The default is False.

HsGetSheetInfo

Applies to: Planning, Planning Modules, Financial Consolidation and Close, Tax Reporting, Oracle Essbase

Description

HsGetSheetInfo retrieves information about the current sheet, one property at a time. The following sheet properties can be retrieved and displayed in the sheet.

Table 16-2 HsGetSheetInfo Details

String Equivalent	Sheet Information
Last Retrieved	The date and time that the last refresh was performed on the sheet
Sheet Type	Form, Ad hoc, Multiple grid ad hoc, Function, or Smart Form
Server	The server to which the sheet is connected
Application	The application to which the sheet is connected
Cube	The cube to which the sheet is connected
URL	The URL to which the sheet is connected
Alias Table	The current alias table
Provider	The data source type to which the sheet is connected

Display of the following sheet properties is not supported:

- User
- Friendly Name
- Description
- Provider URL

Syntax

```
HsGetSheetInfo("<string equivalent>")
```

For detailed syntax information, see Syntax Guidelines.

Example 16-6 Basic Example

In this example, HsGetSheetInfo tells you whether the sheet contains a Form, Ad hoc, Multiple grid ad hoc, Function, or Smart Form.

```
HsGetSheetInfo("Sheet Type")
```

Notes

- If you enter an invalid sheet property, the function returns a "Not Applicable" value.
- In a multiple-grid ad hoc sheet, HsGetSheetInfo always displays information related to the first inserted grid. If you use the Last Retrieved property to find the date and time when the

last refresh was performed on the sheet, the HsGetSheetInfo function displays the time when the first grid was retrieved, even though the second grid was the one that was last retrieved on the sheet. However, you can launch the Sheet Information dialog to see the correct last retrieved time or refresh the sheet one more time to get the consistent time.

- In case of multiple-grid ad hoc sheets having grids from multiple connections, the HsGetSheetInfo function retrieves sheet property only for the first connection, irrespective of the connection that is currently active on the sheet.
  For example, if you have two ad hoc grids from two different connections on a multiple-grid ad hoc sheet and you use the URL property, the HsGetSheetInfo function displays the connection URL only for the grid that was first connected on the sheet.
- With cell styles enabled for an ad hoc grid, if you change a sheet property that you have added using the HsGetSheetInfo function, the function cell appears dirty. For example, if you change the URL sheet property added on the sheet to Cube, the function cell refreshes to display the cube name, but it appears dirty. In such case, click Refresh to remove the dirty background color.

Common Function Error Codes

These are some common error codes displayed in functions.

#NO CONNECTION - You are not connected or logged on to a data source.

#INVALID - Invalid metadata. Invalid cells that contain a value display the value as zero.

#LOCKED - The cell is locked.

#NO ACCESS - You do not have access to this cell.

#NO DATA - The cell contains NoData. You can select to display zeros instead of NoData. Cells use the Replacement text that you specify in the Options panel.

#INVALID INPUT - The HsSetValue data value is not valid, for example, a text string.

#READ ONLY - This is for the HsSetValue function only when the cell is read-only.

#NEEDS REFRESH - Data needs to be refreshed.

#INVALID DIMENSION - An invalid dimension is specified in the function.

#INVALID MEMBER - An invalid dimension member name is specified in the function.

#NAME - Excel does not recognize text in a formula. When you forward a sheet that contains functions to a user who does not have Smart View, they can view the same data as the functions on the sheet. When the user edits or refreshes the function, it changes to #Name.

17

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.
- Guidelines for Working in Free-Form Mode
  Consider these guidelines when working in free-form mode.
- Creating Free-Form Grids
  You can create a free-form grid by typing dimension and member names directly into cells in a sheet.
- Actions that may cause Unexpected Behavior
  Smart View 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 17-1 Smart View Grid Components

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

Guidelines for Working in Free-Form Mode

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 Smart View **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.
- Consider the exceptions listed in Actions that may cause Unexpected Behavior while working in free-form mode.

Creating Free-Form Grids

You can create a free-form grid by typing dimension and member names directly into cells in a sheet.

To create a free-form grid:

1. Open a worksheet and connect to a data source.
2. In the worksheet, enter member names according to the rules specified in Guidelines for Working in Free-Form Mode .
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

Smart View tries to preserve all comments, formulas, and customized report layouts.

Some exceptions that may result in unexpected behavior 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

A
Finding Information

Related Topics

- Accessibility Resources
  This topic provides information about the accessibility documentation available for Smart View (Mac and Browser).
- Troubleshooting Issues
  This section provides resources for troubleshooting issues in Smart View (Mac and Browser).
- Best Practices for Smart View (Mac and Browser)
  Best practices for working with Smart View (Mac and Browser)

Accessibility Resources

This topic provides information about the accessibility documentation available for Smart View (Mac and Browser).

The *Accessibility Guide* covers information on accessibility features of Smart View (Mac and Browser). This guide is available on the **Books** tab of every Oracle Fusion Cloud Enterprise Performance Management business process on the Oracle Help Center.

The accessibility guide covers useful information on the following topics:

- Accessibility settings for Smart View (Mac and Browser)
- Working with JAWS and High Contrast mode
- Access keys for navigating various user interface components

For more information, see Smart View for Office (Mac and Browser) in the *Accessibility Guide*.

Troubleshooting Issues

This section provides resources for troubleshooting issues in Smart View (Mac and Browser).

The *Deploying and Administering Oracle Smart View for Office (Mac and Browser)* guide provides detailed information on how to troubleshoot issues in Smart View (Mac and Browser). It includes tips and workarounds on setup, display issues, and performance improvements.

For more information, see Tips and Troubleshooting in *Deploying and Administering Oracle Smart View for Office (Mac and Browser)*.

Additionally, the *Operations Guide* provides detailed information on how to troubleshoot issues in Smart View (Mac and Browser). For more information, see Fixing Smart View (Mac and Browser) for Office 365 Add-in Issues in the *Operations Guide*

Best Practices for Smart View (Mac and Browser)

Best practices for working with Smart View (Mac and Browser)

Use these best practices for working with Oracle Smart View for Office (Mac and Browser).

This table provides links to the best practices mentioned in this guide.

Table A-1 References for Best Practices for Smart View (Mac and Browser)

Category	Best Practice For	See This Section
Oracle Smart View for Office Options—Advanced	Using the **Apply to All Sheets** button	Advanced Options
Member Selector	Using the Member Selector	Selecting Members from the Member Selector
Data and Cells	Using the Submit Data options	Guidelines for Submitting Data
Drill-Through Reports	Working with drill-through reports	Guidelines for Working with Drill-Through Reports
Drill-Through Reports	Enabling pop-ups in Chrome	Enabling Pop-ups in Chrome for Using Drill-Through
Smart Lists	Working with Smart Lists	Guidelines for Working with Smart Lists
Attachments	Attaching files	Adding Attachments
Data Forms	Working with forms opened in Excel	Guidelines for Forms Opened in Smart View
Smart Forms	Opening Smart Forms in Smart View (Mac and Browser)	Guidelines for Smart Forms
Smart Forms	Creating and working with Smart Forms	Guidelines for Working with Smart Forms
Flex Forms	Working with flex forms	Best Practices for Working with Flex Forms
Ad Hoc Analysis	Starting ad hoc analysis	Starting Ad Hoc Analysis
Ad Hoc Analysis	Inserting attribute dimensions	Guidelines for Inserting Attribute Dimensions
Excel Formulas in ad hoc grids	Preserving formulas	Preserving Excel Formulas in Ad Hoc Operations
Multiple Grids on a Worksheet	Working with multiple grids on a worksheet	Guidelines for Working with Multiple-Grid Sheets
Multiple Grids on a Worksheet	Renaming ranges on a multiple-grid worksheet	Guidelines for Renaming Grids on a Multiple-Grid Sheet
Cascading Reports and Ad Hoc Grids	Cascaded sheet name limit	Cascading Reports
Books	Working with EPM Books	Guidelines for Working with Books in Smart View
Undo and Redo	Using Undo and Redo	About Using Undo and Redo
Free-Form Mode	Working in free-form mode	Guidelines for Working in Free-Form Mode
Metadata	Copying, pasting, and importing metadata	About Importing Metadata in Smart View
Sheet Information	Viewing sheet information	Guidelines on Sheet Information
Functions	Using functions	Guidelines for Using Functions
Function Builder	Using Function Builder	Creating Functions in the Function Builder
Function Builder	Using cell references	Using Cell References
Functions	Creating functions manually	Syntax Guidelines
Functions	Using the Fix Links option	Fixing Links in Functions