Oracle® Fusion Cloud EPM

Working with Reports

E94134-49

Oracle Fusion Cloud EPM Working with Reports,

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Contents

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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
Overview of Reports

Related Topics

- Learning About Reports
- Accessing Reports
  You can gain access to Reports by selecting **Reports** or the **Library** card from the Home page.
- Previewing a Report
- Viewing Reports
  Selecting the **Action** menu enables you to view Reports in different ways.
- Working with Reports in Smart View
- Working with Notes

Learning About Reports

Reports provides a user-friendly, robust report development framework along with an enriched report viewer experience. Reports is included with Narrative Reporting (Narrative Reporting deployment) where it enables you to insert charts and grids from multiple Oracle Fusion Cloud EPM sources, Essbase Cloud, and ERP Cloud Financials. Reports is also embedded in the Oracle Fusion Cloud Enterprise Performance Management Platform business processes and applications: Enterprise Profitability and Cost Management, Planning and Planning Modules, Financial Consolidation and Close, Tax Reporting, and FreeForm (Cloud EPM deployment) for single instance reporting.

Reports also includes books and bursting. Books provide the ability to group together one or more reports, Books, and other documents, to generate a single PDF or Excel output. Bursting enables you to run a single report or book for more than one member of a single dimension for one data source, and publish a PDF or Excel output for each member.

Reports can also be used to generate Cloud EPM System Reports (Enterprise licenses only), specifically for the Cloud EPM business processes and components, such as Task Manager, Supplemental Data, and Enterprise Journals. You can embed Data Tables within Reports to include system data, as required. You can accomplish this by inserting a relational table into a report, connecting to a Cloud EPM business process schema, selecting members, and then generating a system report based on Cloud EPM relational system data. You can also use some of the grid features in tables, such as member selector, prompts and POV, formatting, sorting, drill to content, conditional formatting/suppression, formulas, and grouping. The other Report features that are available with relational tables are charts, text boxes, books, bursting, and Excel output (reports only).

Reports in Narrative Reporting deployments also includes Notes for POV-based narrative text which is then displayed in formatted reports along with grids and charts. You can utilize Notes where reporting structure and narrative requirements are uniform across Entities, Departments, and so on. Cloud EPM deployments do not include Notes.

Reports provides an easy-to-use drag and drop interface for designing and editing reports. You can:

- Create, insert and position report objects (grids, charts, image, textbox) into a report.
- Design and preview the results of an individual grid or chart without having to run the entire report.
- In Narrative Reporting deployments, insert report objects contained in a shared report to use the report objects in multiple reports, providing a single point of maintenance for the shared report objects.
- Insert formulas to calculate grid values and text functions to dynamically retrieve report and grid metadata.
- Utilize enhanced charting with a variety of chart types and features.
- Use data source features in your reports such as dynamic member selection functions, substitution variables, cell text and file attachments, financial intelligence, UDAs, and Attributes.
- Apply conditional formatting, text, and suppression to format grid cells or suppress data based on member information or data values.
- Zoom on parent members to display detailed members and drill to other reports or source data.

In Narrative Reporting deployments, you can:

- Embed Reports into Narrative Reporting report package doclets to integrate them in the collaborative narrative reporting process, with centralized Point of View (POV) control and server-side refresh with automatic doclet updates.
- Combine cross-Cloud content into a single report. You create and define a data source connection to point to the desired data source.
- Reports, security, and POV selections are managed within Narrative Reporting. Artifacts are stored and managed in the Narrative Reporting Library.
- Reports, books, and bursting definitions can be exported and imported into another environment.
- Fonts are uploaded and managed in the Narrative Reporting Library.
- Scheduling for bursting definitions is done via the Narrative Reporting Job Console.
- Migrate Financial Reporting (FR reports) to Reports via Library import of Financial Reporting (FR) report artifact exports.
- Utilize Generative AI (GenAI) for generating narrative summaries in a text box or text segment, as well as to summarize Notes.

In Cloud EPM deployments:

- Reports does not include Notes or Gen AI functionality.
- Reports are integrated with Narrative Reporting via **Remote Libraries**, however Reports in Cloud EPM deployments cannot be inserted into **Report Packages**, or **Books** and **Bursting Definitions** in Narrative Reporting.
- Reports is embedded in each business process, with single instance reporting. You cannot point to other Cloud EPM instances. Data Sources are automatically created based on the Cloud EPM application cubes that are on the instance.
- Reports, security, and POV selections are managed by the Cloud EPM platform. Reports are stored in the Cloud EPM repository.
- Reports, books, and bursting definitions can be moved between environments using the Cloud EPM Lifecycle Management.

- Migrate Financial Reporting (FR reports) to Reports natively via the Financial Reporting card/tab.
- Fonts are uploaded and managed in Application Setting in Reporting Settings.
- Scheduling for bursting definitions is done via the Cloud EPM platform Job Scheduler.

Watch this overview video to understand the highlights of Reports.

-- Reports in Cloud EPM Narrative Reporting.

-- Reporting in the new Cloud EPM Platform.

Watch this tutorial video, you'll learn how to create reports.

-- Creating Reports in Narrative Reporting Cloud.

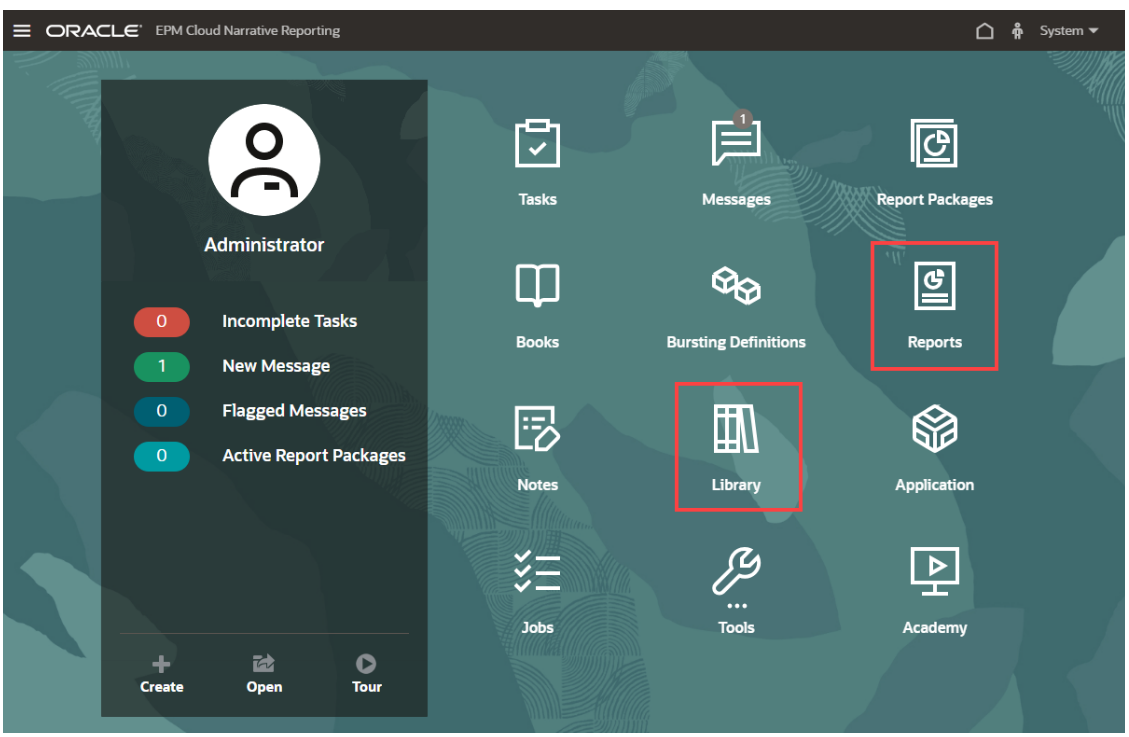
-- Creating Reports in Cloud EPM.

Accessing Reports

You can gain access to Reports by selecting **Reports** or the **Library** card from the Home page.

For Narrative Reporting Deployments:

To access reports from Narrative Reporting, see Welcome to Narrative Reporting and Learning about the Library . From these two locations you can find information on how you can access reports from the system generated Reports folder in Narrative Reporting, from personal folders you created or have been granted access (View permission) in the Library, and from the Home page as shown in the image below by selecting the **Reports** or **Library** icons.



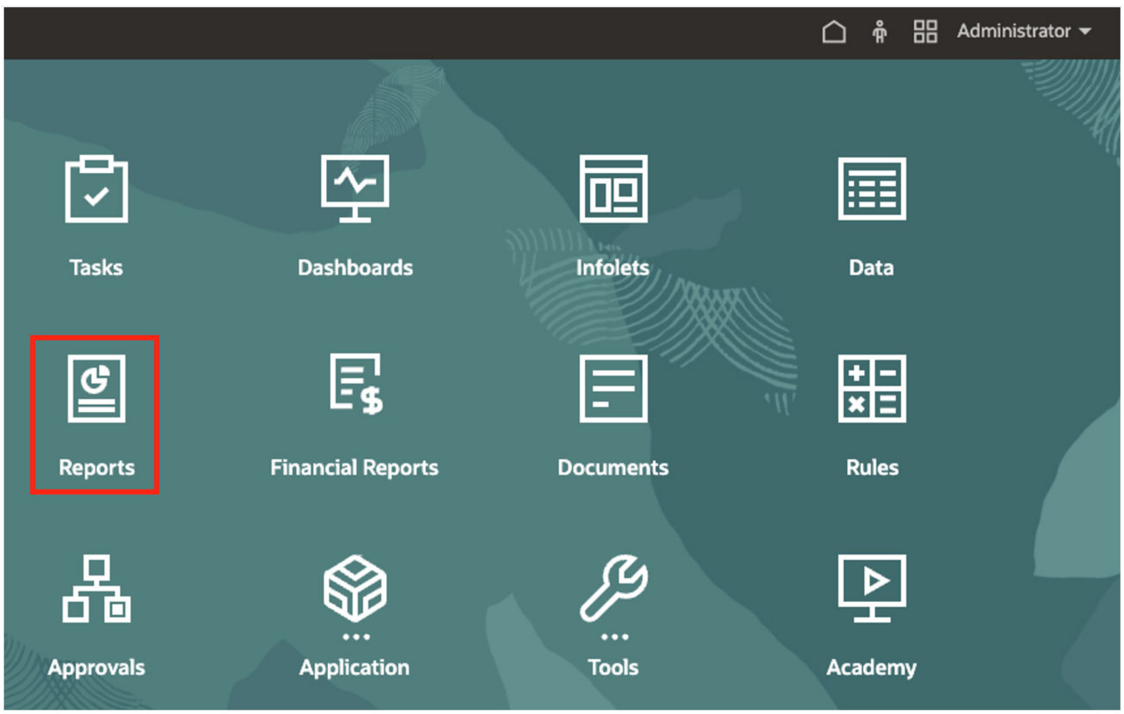
Watch this tutorial video, you'll learn how to insert a report as a reference doclet in a report package, which then allows you to embed grid and chart content into doclets.

 -- [Viewing and Interacting with Reports in Narrative Reporting](#).

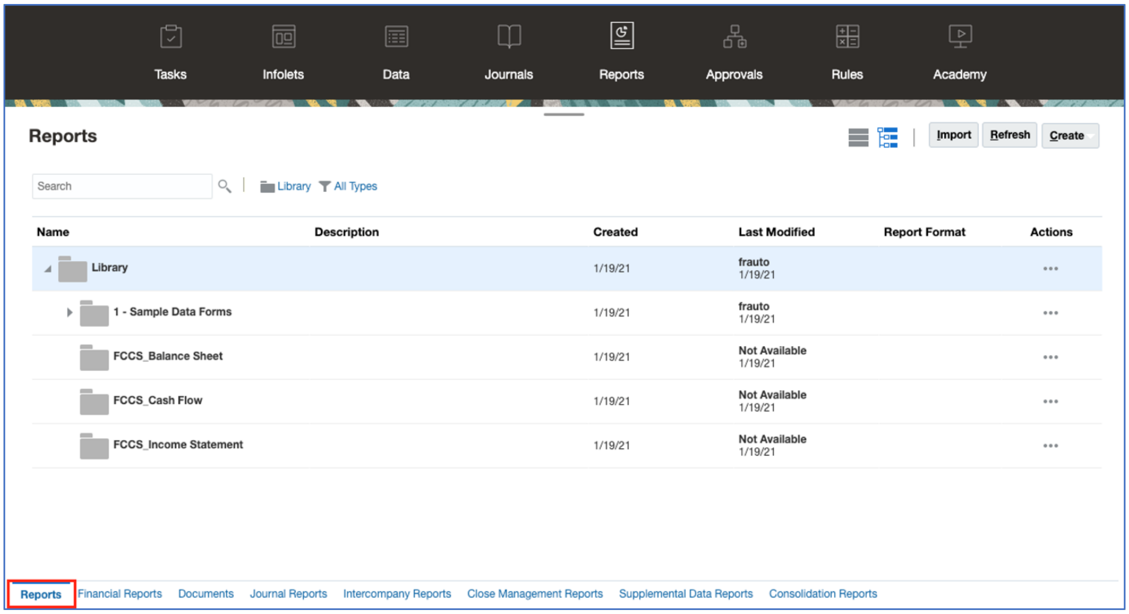
For Word-based and PDF-based report packages, you can embed content into Word doclets. For PowerPoint-based report packages, you can embed content into PowerPoint doclets. For PDF-based report packages, you also can insert reports directly as doclets.

For Enterprise Performance Management Cloud Deployments:

From Oracle Fusion Cloud Enterprise Performance Management platform service, select the **Reports** card from the home page (**Library** card in Tax Reporting). In Financial Consolidation and Close, and Tax Reporting, select **Reports** from the horizontal tabs.



In Financial Consolidation and Close, and Tax Reporting, select **Reports** from the horizontal tabs.



Previewing a Report

Related Topics

- About Previewing a Report
- Selecting Members for the Global POV
- Selecting Members for the Local POV
- Working With Valid Intersections
- Responding to Report Prompts
- Zooming on Parent Members
- Drilling to Content, Drill Through, Cell Attachments and Comments
- Previewing the POV of a Report
- Drilling on Conditional Text

About Previewing a Report

If you have the "Viewer" or "User"role and depending on the selections and options that are set by report designer, you can select members for each dimension when previewing a report.

The members displayed in the member selector are dependent on the users metadata security defined at the data source. If metadata security has been applied at the data source for a dimension's members, users may receive a "member not found" error when accessing a report, if they do not have access to members in a dimension.

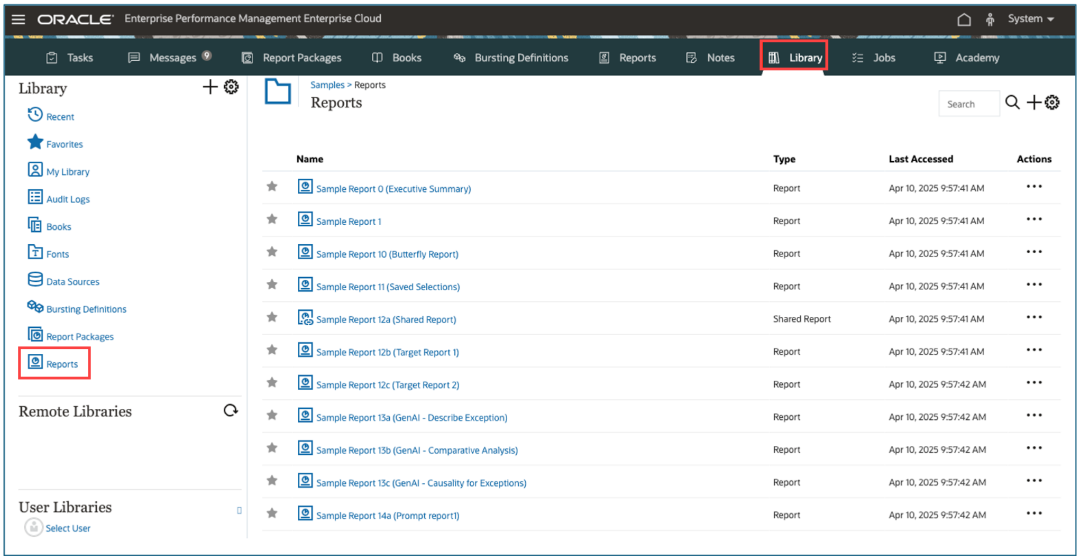
Global POV dimensions are displayed at the top of the report, and Local POV dimensions are displayed at the top of their corresponding grid or chart (in HTML Preview only). See POV Overview.

If the report designer has added prompts for the global POV, grid columns, grid rows, you respond to the prompts when you preview a report.

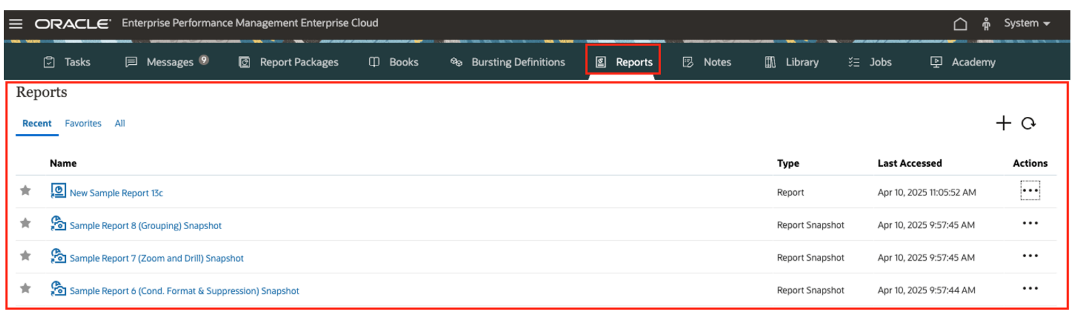
Previewing a Report in Narrative Reporting Deployments

To preview a report in Narrative Reporting deployments, from the Home page, do one of the following:

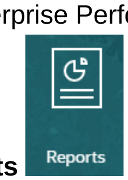
- Select a report from the **Library** card



- Select a report from the **Reports** card

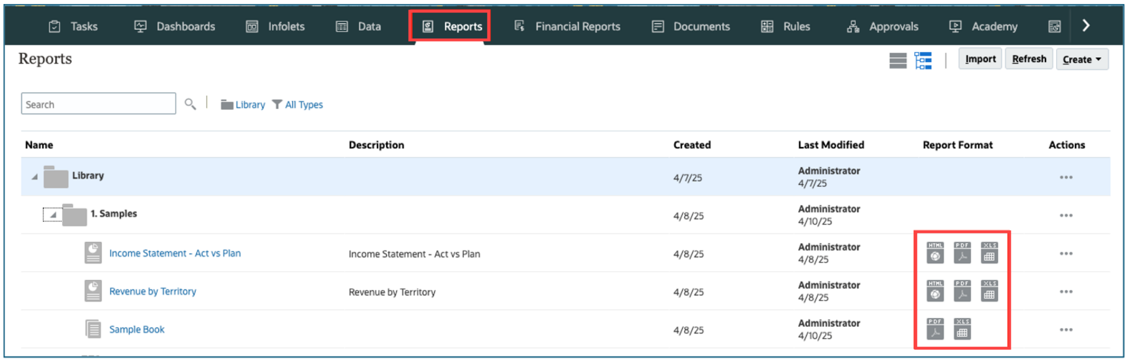


Previewing a Report in Enterprise Performance Management Cloud Deployments

To preview a report in Oracle Enterprise Performance Management Cloud deployments, from the Home page, select the **Reports** 

card (Library card in Tax Reporting). In Enterprise Profitability and Cost Management, FreeForm, Planning, and Planning Modules, from the left pane select **Reports** icon. In Financial Consolidation and Close, and Tax Reporting, select **Reports** from the horizontal tabs.

1. Select a report from the **Reports** list.
2. Select either **HTML**, **PDF**, or **Excel** preview.



Selecting Members for the Global POV

To select members for the Global POV:

1. At the top of the report in the POV bar click on an available dimension label to select a member.

   If a POV dimension is disabled (gray colored label), you are not able to change the selection for that dimension.

2. If a single member is displayed (the report designer selected one member) in the POV member list, from preview you can click on the member in the POV bar and make a selection for that dimension by selecting **All Members...** or select and then **Select Members...** to open the Member Selector dialog to select additional members.

   Recently selected members for the same dimension are also listed.

3. If multiple members are listed in the POV member list, select a member from the list.
4. If the report designer has enabled additional selections for a dimension, you can click on **All Members…** to open the Member Selector dialog to select additional members for the dimension.
5. If the designer has enabled "Print All Selections" for a dimension with multiple selections and if the report is previewed in PDF, the dimension does not display in the POV bar since the report displays on separate pages for each member selection.
6. **Optional:** Repeat selecting members for other Global POV dimensions, where applicable.

> **Note**
>
> - Selected members in the Global POV are saved for future sessions for reports with the same data source for each user. The previously selected members for a dimension are selected by default when opening another report against the same data source.
> - If an attribute dimension is in the Global POV, the report designer can choose to exclude the attribute dimension from the initial report query. This will result in the attribute dimension displaying a `-` for its selection. A POV member can be selected and the attribute dimension will included in the report query. Any POV selection made for an attribute dimension when Exclude is enabled, is not saved for future sessions. When re-running the preview, the selection will be reset to `-`.
> - If the report results are too large to be rendered in the browser, you are prompted to download the report as a PDF where you can either select **OK** to download or **Cancel** to cancel the operation.
> - When substitution and user variables are used as selections for the Report Point of View and in prompts, the Variable values are retrieved when the system first connects to the data source. The member selector and/or POV will display the Variable's value. When running a Report, the latest Variable value will be retrieved. However, if a Variable value changes during a user's session, the change will not be reflected in the Variable value displayed in the member selector or POV, until the user reconnects to a new session by logging out and logging in again.
> - Using the member selector, if you select a POV for dimensions with over 25,000 members, the search in the member selector is only based on the member name (not alias) and is a "starts with" type search, rather than a "contains" type search.

Selecting Members for the Local POV

To select members for the Local POV:

1. Preview a report in HTML preview (the Local POV is not available in PDF preview). At the top of the grid or chart with Local POV dimensions, click on an available dimension label to select a member.

   If a POV dimension is disabled (gray colored label), you will not be able to change the selection for that dimension.

2. If a single member is displayed (report designer selected one member) in the POV member list, you can click on **All Members…** to open the Member Selector dialog to select additional members.

   Recently selected members for the same dimension are also listed.

3. If multiple members are listed in the POV member list, select a member from the list.
4. If the report designer has enabled additional selections for a dimension, you can click on **All Members…** to open the Member Selector dialog to select additional members for the dimension.
5. **Optional:** Repeat selecting members for other Local POV dimensions, where applicable.

6. Selected members in the Local POV are not saved when opening another report. The Local POV selections apply only to the current session with a single report.

Working With Valid Intersections

Review the following topics:

- Learning About Valid Intersections
- Understanding Valid Intersections from the Point of View
- Understanding Valid Intersections on Grid Data

Learning About Valid Intersections

In the Cloud EPM Platform business processes, administrators can enable applications to include valid intersection rules. For example, you can specify that certain **Products** are valid only for certain **Entities**. Valid intersections also provide Point of View (POV) member filtering between dimensions where valid intersection rules are defined. For example, when selecting a member in the **Entity** dimension, the **Product** dimension will only list the members that are valid for the selected **Entity**.

In data entry forms, valid intersections allow users to view or enter data only at predefined valid intersections. In Reports, when previewing a report, POV member filtering is enabled for valid intersections, and grid data will only display for valid intersections.

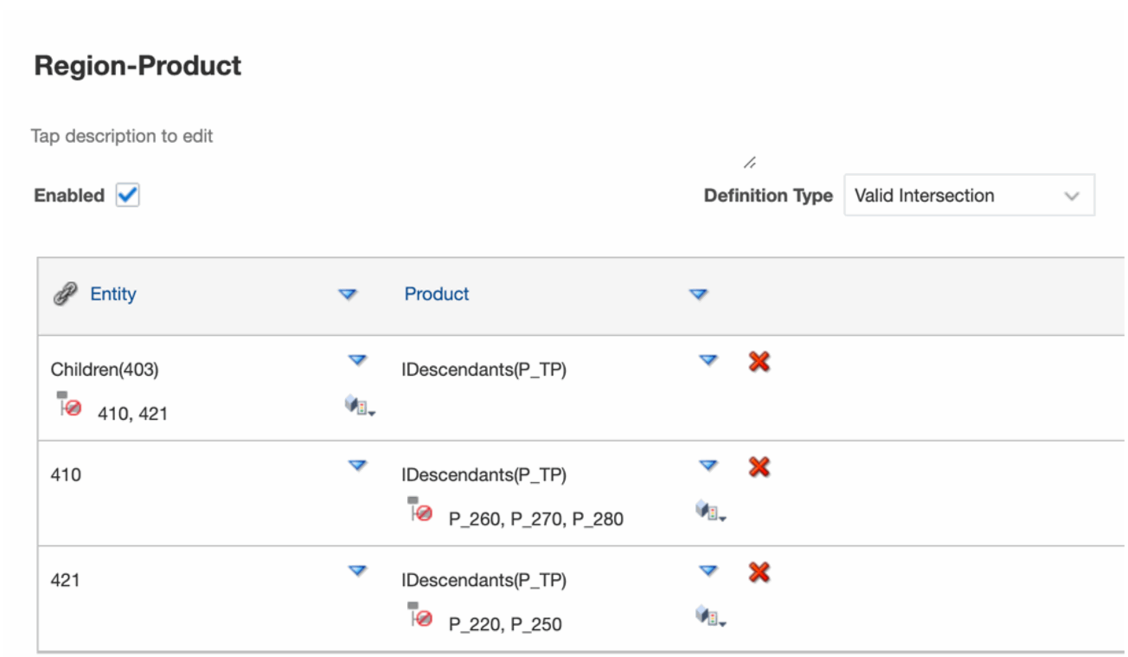
> **Note**
>
> - Valid Intersection POV member filtering is only supported for report grids. Books and bursting definitions are not supported and will not filter the POV members for valid intersections.
> - Valid Intersection POV member filtering is only supported when selecting members in the POV bar, and not when selecting POV members in a prompt.
> - **Substitution** and **User Variables** with member values that are included in valid intersection rules are not supported with POV member filtering.

When previewing a report, you can choose to view all members in a POV dimension, including invalid members, by selecting **Show Invalid Members** in the POV drop-down list or in the POV member selector for the dimension. You can also choose to show valid or invalid intersections by selecting or deselecting the **Show Only Valid Intersections** preference in the report preview, using the Reports **Actions** menu. This preference is not selected by default, and it applies to all reports connecting to the same data source for the user.

> **Note**
>
> - Due to the additional processing required for valid intersection POV member filtering, there may be some performance impact with valid intersections enabled when accessing the POV. The number of dimensions in the valid intersection rules and the number of rules defined can affect performance.
> - When valid intersection rules are created against a POV dimension with more than 25,000 members and **Show Only Valid Intersections** is enabled, Reports will display a flat list of members that are valid in the Member Selector instead of a hierarchical display.

- The following two sections illustrate working with valid intersections in POV member selections and with data in a report:
  - Understanding Valid Intersections from the Point of View
  - Understanding Valid Intersections on Grid Data
- In these examples, the valid intersection rules are set up in the Cloud EPM business process application as follows, Valid Intersection rules shows an example of the valid intersection rules.
- When the **403: Sales** member is selected in the Entity dimension, all products in the Product dimension are available for selection.
- When the **410: International Sales** member is selected in the Entity dimension, the members **P_260: Game**, **P_270: Camera**, and **P_280: Television** are not available for selection. All other members are available for selection.
- When the **421: Sales North East** member is selected in the Entity dimension, the members **P_220: Software Suite** and **P_250: Network Card** are not available for selection. All other members are available for selection.

Valid Intersection rules



Related Topics

- [Understanding Valid Intersections from the Point of View]
- [Understanding Valid Intersections on Grid Data]

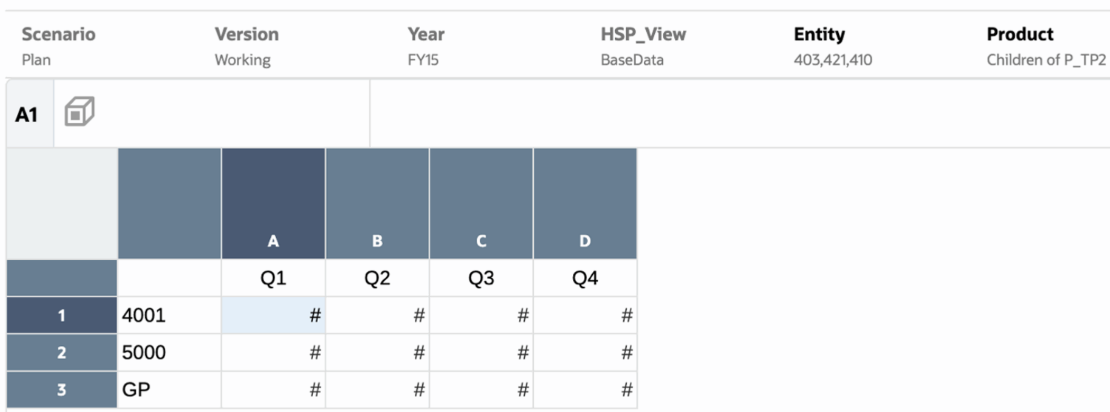
Understanding Valid Intersections from the Point of View

This example shows selecting members in the **Entity** and **Product** dimensions to change the POV of a report grid within the scope of the valid intersection rules.

> **Note**
>
> See Learning About Valid Intersections for the valid intersection rules used in this example.

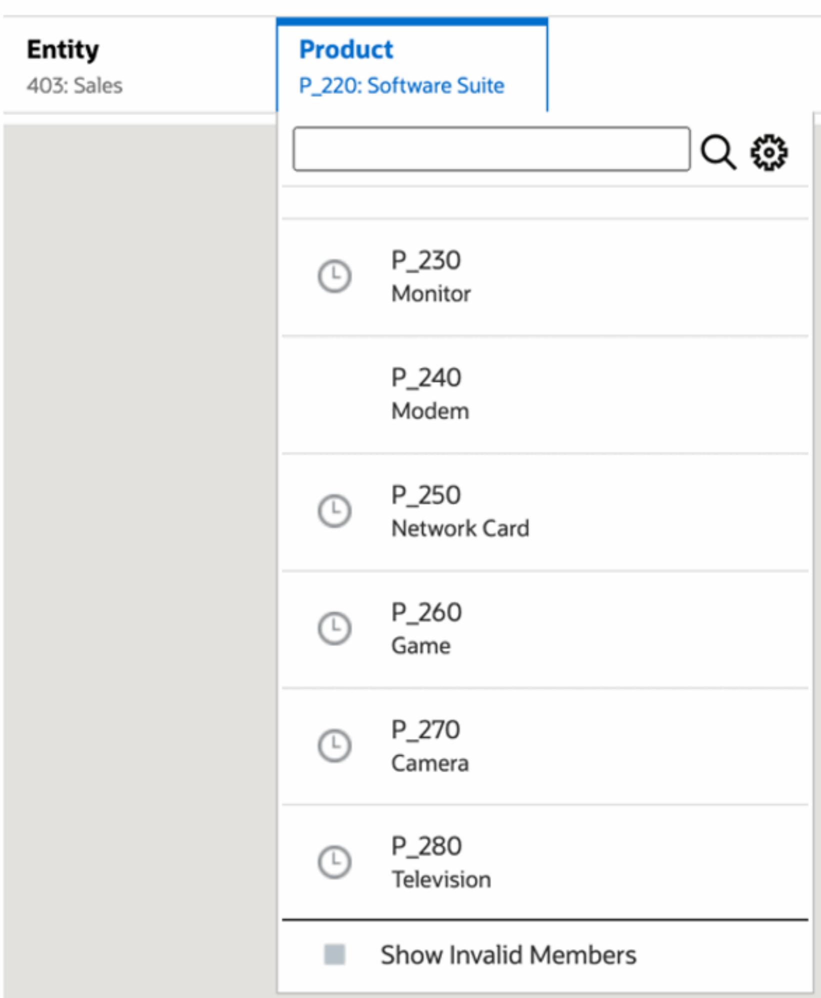
The below grid design has changeable **Entity** and **Product** dimensions in the POV, with the following selections:

- Entity: **403: Sales**, **410: International Sales,** and **421: Sales North East**
- Product: **Children of P_TP2**, which includes the **P_2*** members shown in the valid intersections rule above.

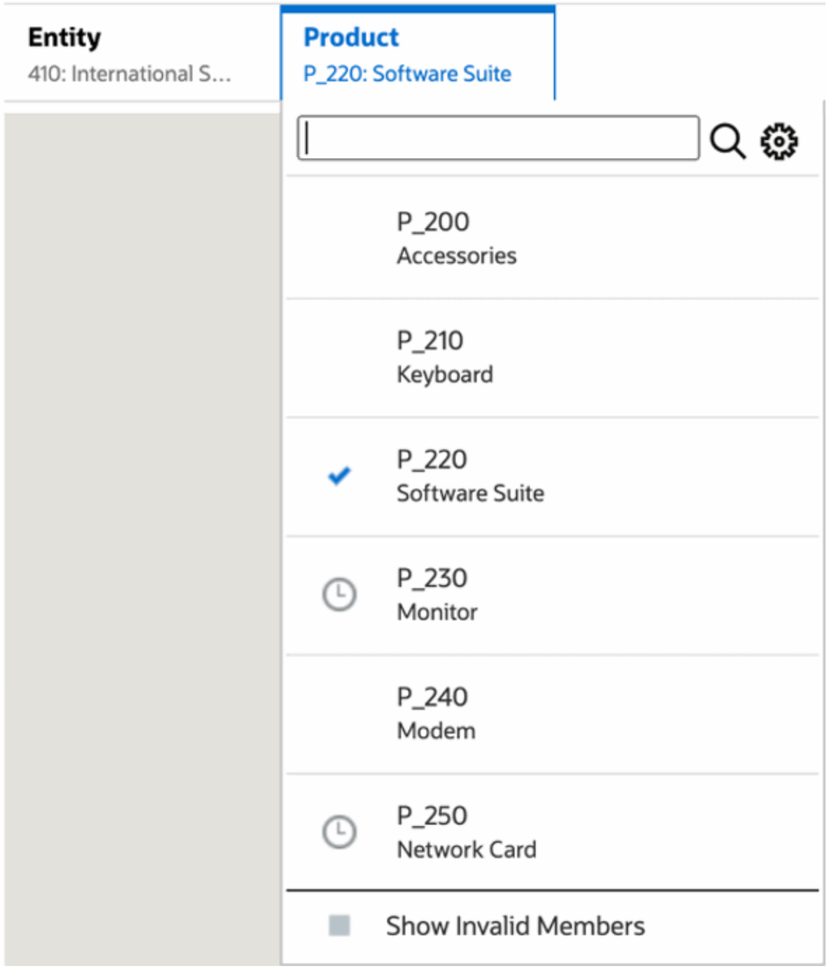


According to the valid intersection rules:

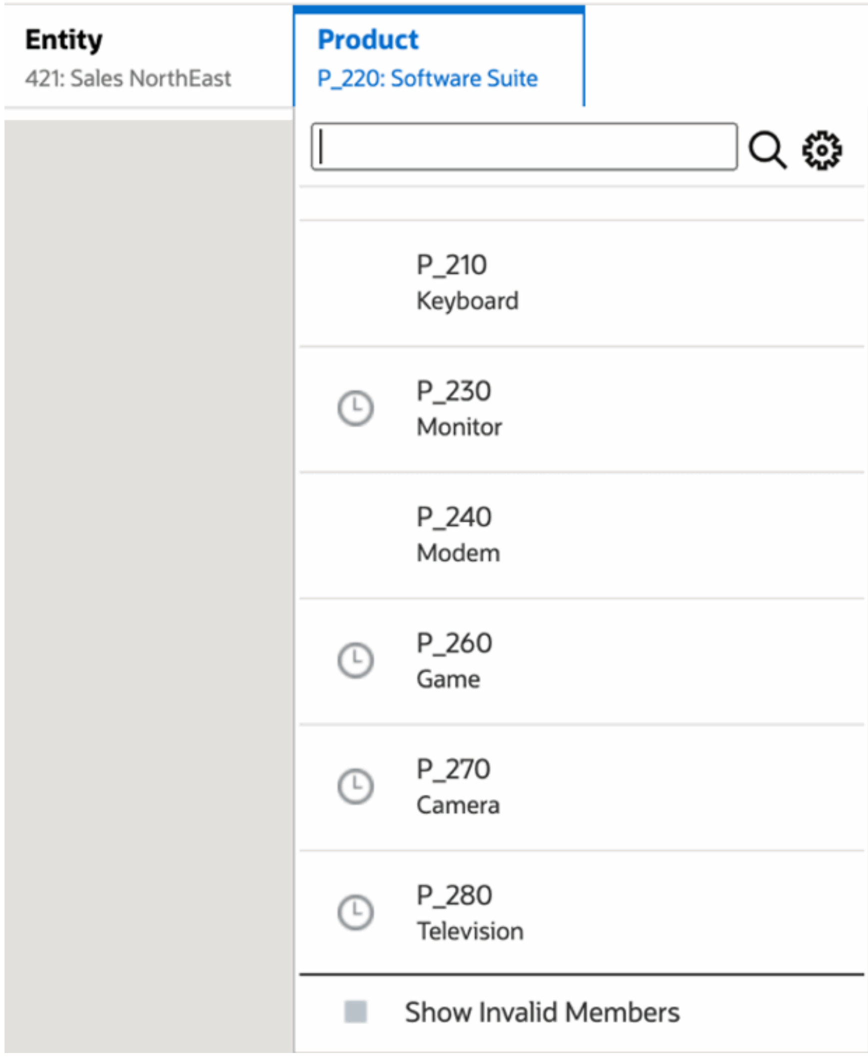
- When the **403: Sales** member is selected in the **Entity** dimension, all products in the **Product** dimension are available for selection. Since **Children of P_TP2** was defined as the POV selection for the **Product** dimension; only these members will be displayed when running the report. For example:



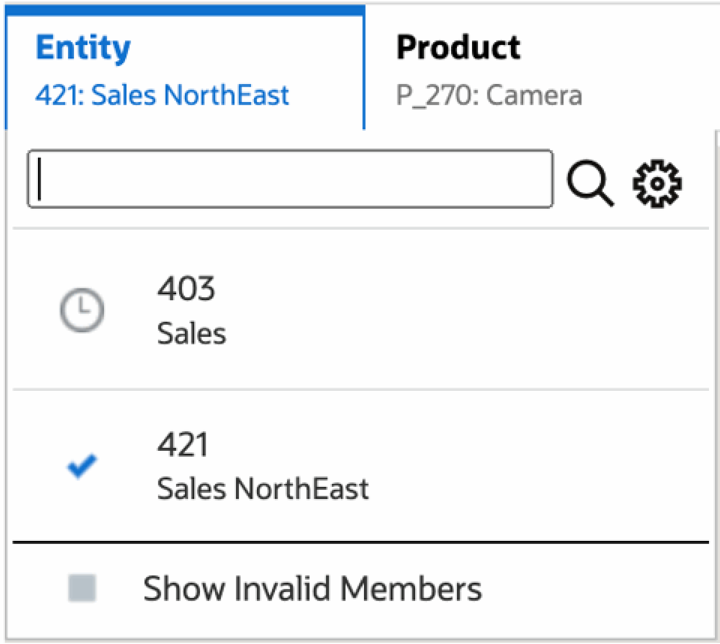
- When the **410: International Sales** member is selected in the **Entity** dimension, the members **P_260: Game**, **P_270: Camera**, and **P_280: Television** are not available for selection. All other members are available for selection. For example:



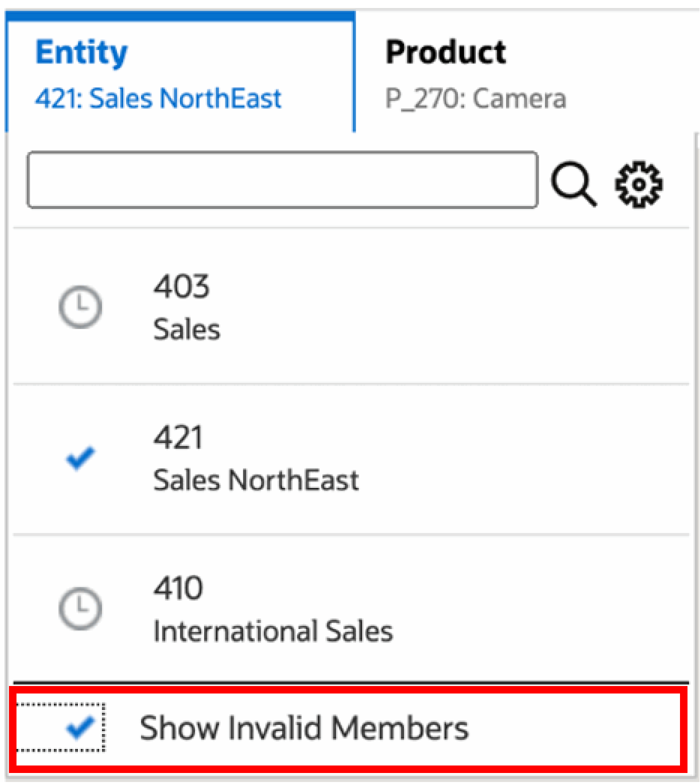
- When the **421: Sales North East** member is selected in the **Entity** dimension, the members **P_220: Software Suite** and **P_250: Network Card** are not available for selection. All other members are available for selection. For example:



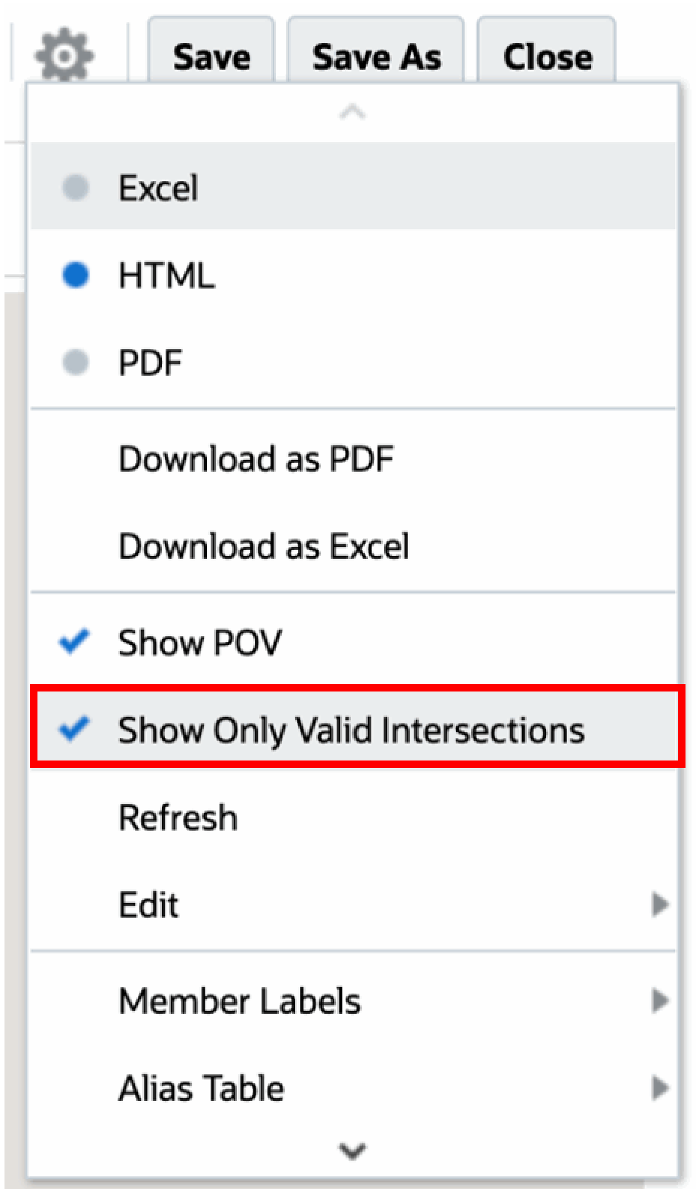
When selecting POV members in one dimension that are not valid for another POV dimension that is displayed, you show all members by selecting **Show Invalid Members** in the POV list or member selector. For example, when the **Entity 421: Sales North East** member is selected along with the **Product P_270: Camera**, the **Entity** POV list will not display the **410: International Sales** member since the **Product P_270: Camera** is not valid for it:



To display the **410: International Sales** member in the **Entity** list, select **Show Invalid Members**.



Alternately, you can also choose to show valid or invalid intersections by selecting or deselecting the **Show Only Valid Intersections** preference, while previewing the reports using **Action** menu.



Note

If the **Entity** dimension **410: International Sales** is selected along with the **Product** dimension **P_270: Camera**, since this is an invalid combination of data, the following message will be displayed in the report:

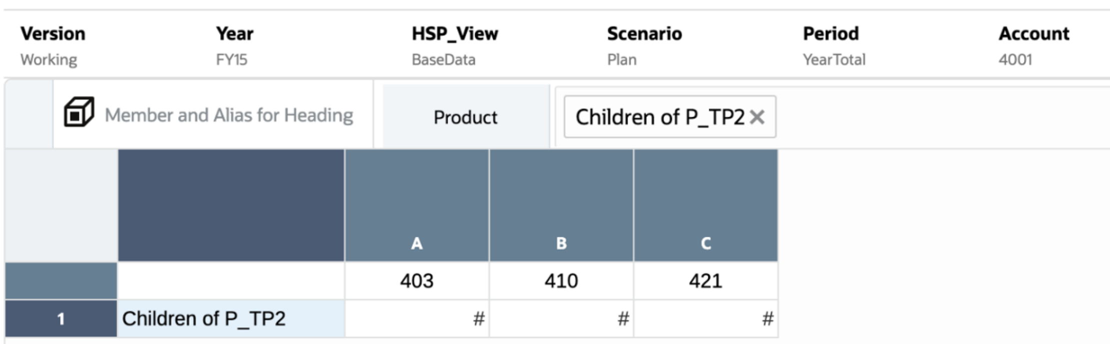
Understanding Valid Intersections on Grid Data

This example shows a grid with the Entity and Product dimensions in the grid to show how invalid combinations of data are not displayed.

> **Note**
>
> See [Learning About Valid Intersections]() for the valid intersection rules used in this example.

The grid design below is as follows:

- **Columns**: Entity: **403: Sales**, **410: International Sales**, and **421: Sales North East**
- **Rows**: Product: **Children of P_TP2**



When previewing a grid, you must note that data for invalid intersections is displayed as #MISSING:

- For the first column with the **403: Sales** member, data for all products is displayed since all Products are valid for **403: Sales**.
- For the second column with the **410: International Sales** member, data for the following products are displayed as #MISSING since these members are not valid for **410: International Sales**: **P_260: Game**, **P_270: Camera**, and **P_280: Television**.
- For the third column with the **421: Sales North East** member, data for the following products are displayed as #MISSING since these members are not valid for **421: Sales North East**: **P_220: Software Suite,** and **P_250: Network Card.**

Version	Year	HSP_View	Scenario	Period	Account
Working	FY15	BaseData	Plan	YearTotal	4001

	403: Sales	410: International Sales	421: Sales NorthEast
P_200: Accessories	21,463,426	2,870,809	3,523,947
P_210: Keyboard	13,665,957	2,519,056	1,954,009
P_220: Software Suite	17,865,738	3,016,795	#MISSING
P_230: Monitor	11,902,983	1,991,325	1,735,706
P_240: Modem	27,751,398	2,853,149	5,016,043
P_250: Network Card	6,294,063	1,282,060	#MISSING
P_260: Game	6,943,600	#MISSING	1,534,797
P_270: Camera	3,251,232	#MISSING	462,498
P_280: Television	25,027,563	#MISSING	3,992,870

Responding to Report Prompts

If a report designer has added prompts to the Global POV (where **Print All Selections** is enabled), grid columns, or grid rows, you select the members for the prompts from the **Select Members** dialog box when you preview the report. You can select from a choice list that the designer specified, or from all members of a dimension that you have access to if the designer did not specify a choice list. You can also manually enter prompts with the following behaviors and limitations:

- Enter member (unique) name or alias based on whichever is being displayed for the prompt in the runtime prompt dialog. The member label (name or alias) that is displayed and required for manual entry in the prompt dialog is based on the following conditions:
  - For prompts in the POV, the required member or alias is based on the preference selected for **Member Label** in the Action menu by the user running the report. If **Member Name** is selected when opening the report, the member name will be required for entry. Switching the preference to "Alias" and then reopening the report will result in the member alias required for the POV prompt.
  - For prompts in the grid rows and columns, the required member or alias is based on the member label displayed in the segment where the prompt is selected by the report designer. For example, if a row segment for the member where the prompt exists displays the alias, the resulting prompt will require the end user to enter the alias.
  - If the member label of "both" is defined in either the user's preference for "Member Labels" or in the grid segment member label displayed, the member name will always be required in the prompt, as the textual entry for prompt selections does not support both member name and alias selection.

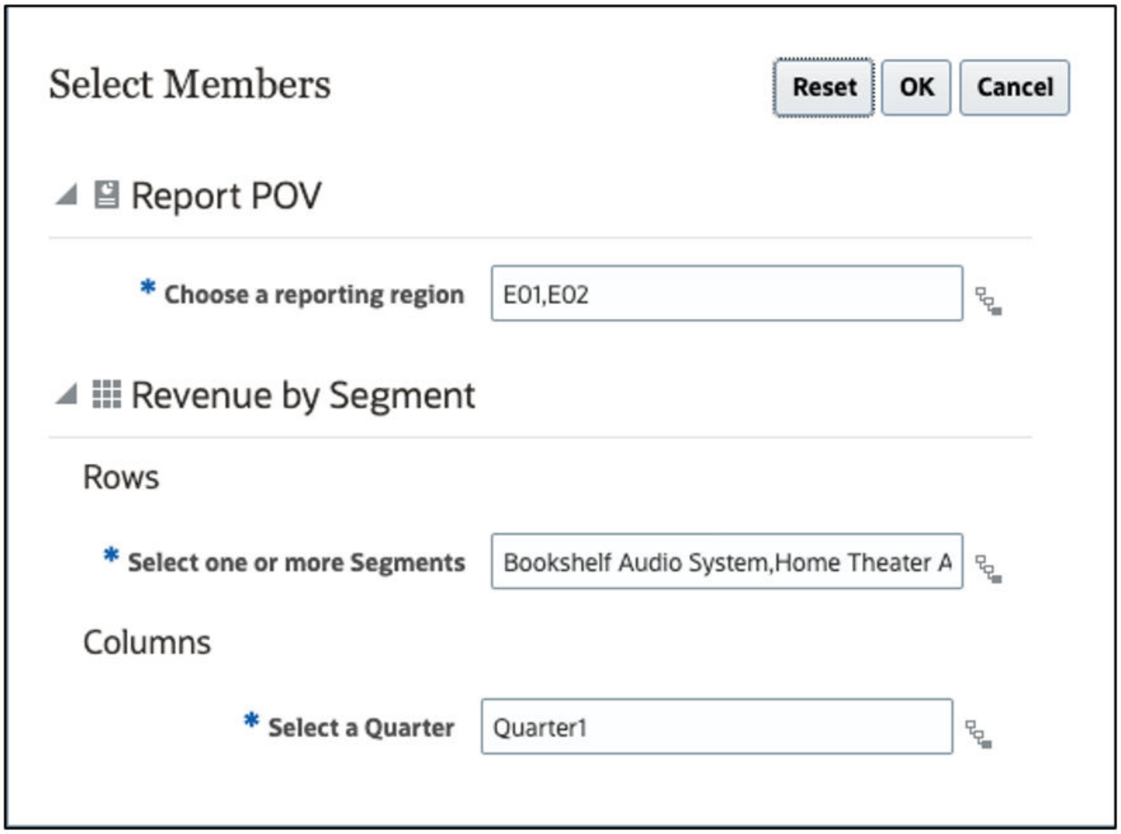
  > **Note**
  >
  > For selecting shared members, unique member name as displayed in the user interface needs to be entered.

- You can enter multiple members for multi select prompts by using comma as a separator. If your member names contain commas, you will need to use the member selector instead of manually entering the multiple prompts.

- Member input is case sensitive.
- If there are invalid entries, you will need to address them before being able to leave the dialog except by clicking **Cancel**.

The dialog box groups the prompts for the Report POV and the grid rows and columns. **Prompt Example** shows an example of the Select Members dialog box with the prompts grouped by Report POV and then Grid 1 rows and columns.

Figure 2-1 Prompt Example



If a report designer has specified a default member or members for a prompt, they are displayed in the prompt fields.

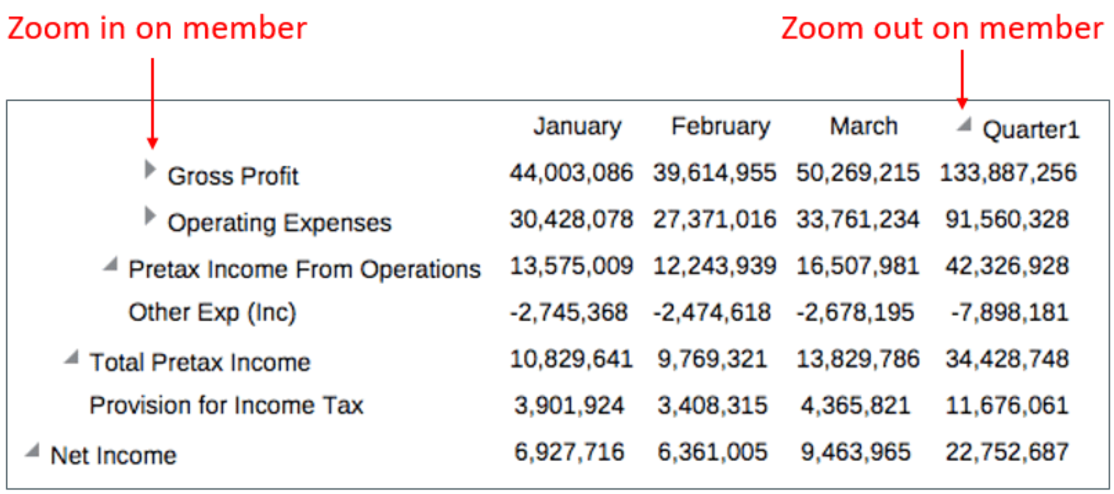
Click to open the Member Selector and then select the members that you want to display for the prompt. Click **Reset** to reset all selections back to their default values.

> **Note**
>
> Your prompt selections are retained for the current session while previewing the report.

Zooming on Parent Members

If the report designer has enabled zoom on parent members, you can expand a row or column with those parent members to see their children, descendants or bottom level members (depending on how the report designer enabled the zoom) when you preview a report in HTML. The report designer can enable zoom on the entire grid, on specific row and column segments, or they can enable ad hoc analysis, which allows you to select the parent members that you want to zoom on. The zoomed members will display either before or after the parent member, depending on how the report designer set up the zoom. See Working in Ad Hoc Mode.

In HTML preview, parent members where zoom is enabled are displayed with icons. To zoom out again, click .



	January	February	March	Quarter1
Gross Profit	44,003,086	39,614,955	50,269,215	133,887,256
Operating Expenses	30,428,078	27,371,016	33,761,234	91,560,328
Pretax Income From Operations	13,575,009	12,243,939	16,507,981	42,326,928
Other Exp (Inc)	-2,745,368	-2,474,618	-2,678,195	-7,898,181
Total Pretax Income	10,829,641	9,769,321	13,829,786	34,428,748
Provision for Income Tax	3,901,924	3,408,315	4,365,821	11,676,061
Net Income	6,927,716	6,361,005	9,463,965	22,752,687

If you zoom on specific rows or columns, the zoomed members will be retained and displayed when you perform these actions:

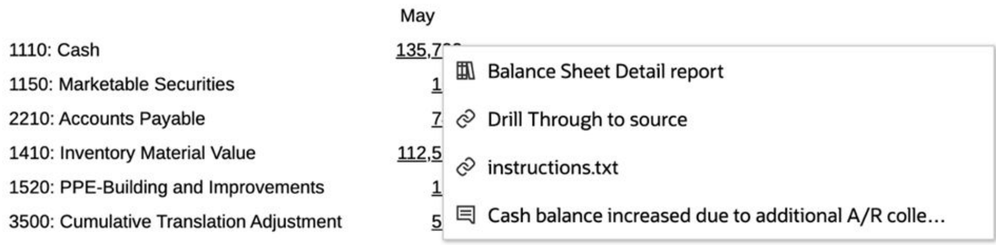
- Switch to PDF preview.
- Download the report as PDF
- Save the report as a snapshot
- Change the POV.

Drilling to Content, Drill Through, Cell Attachments and Comments

If a report designer has added Drill to Content links to grid cells, or if drill through to source and/or cell file attachments exist at the data source and have been enabled for viewing in the report, you can click on the links to launch the target report, document, URL, drill through or cell file attachment when you preview the report in HTML.

If more than one drill definition exists for a cell, a drop-down box with all of the definitions is displayed. Click the link that you want to launch to view the target in a separate browser tab.

You can also view the cell notes or text comments attached to the report or grid cells. To view the full note text, ensure that you hover your mouse over the contextual menu.



Previewing the POV of a Report

If **Preview POV** has been selected on the **User Preferences** tab, then opening or previewing a report requires selecting

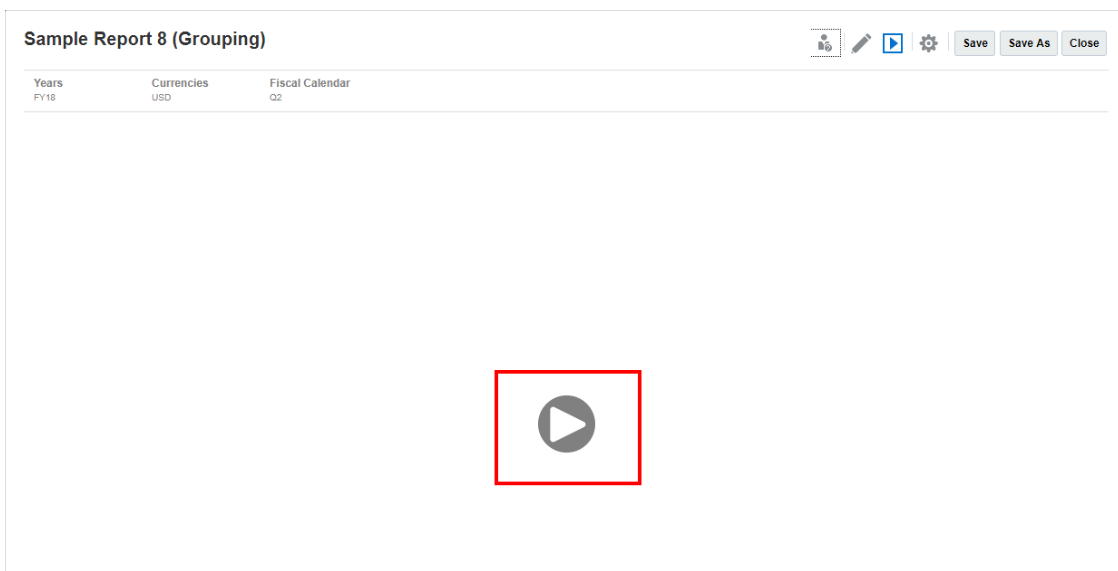
to refresh data.

In Narrative Reporting deployments:

Go to the **Report Preferences** tab. See Manage User Preferences.

In Oracle Fusion Cloud Enterprise Performance Management deployments:

Go to the **User Preferences** tab, and then **Reports**.

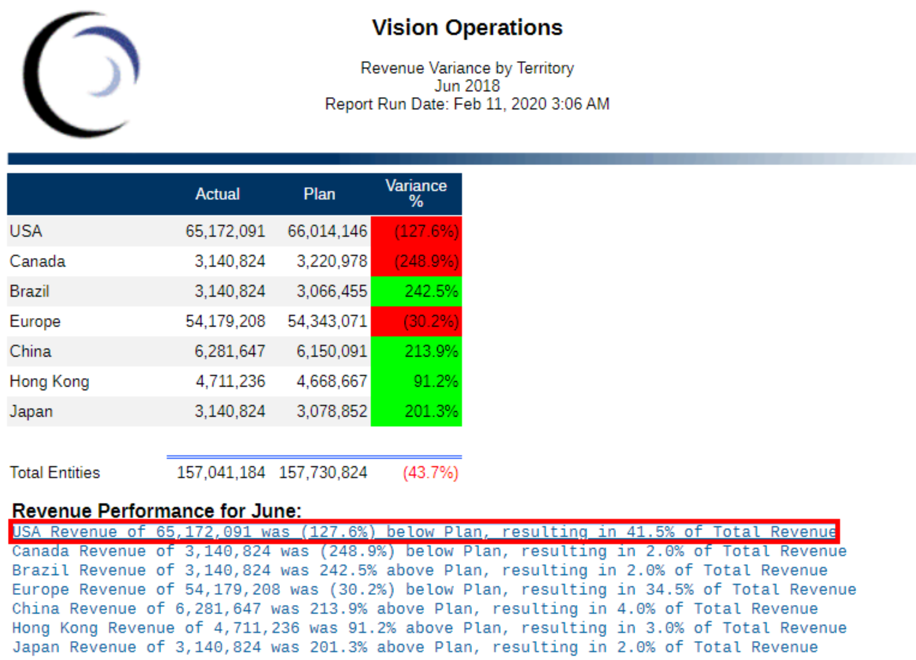


Drilling on Conditional Text

When previewing a report in HTML format where the conditional text is displayed in a text box, you can drill from the text to a new browser tab containing the related zoom-enabled grid for further analysis capability.

For example, using "Sample Report 6 (Cond. Format & Suppression)", note that all conditional text in the text box is displayed as hyperlinks. After clicking on the first row of text **"USA Revenue of 65,172,091"**, the zoom-enabled grid open in a separate browser tab, where you can zoom on parent members to display detailed data.

Source Page: You can see all Analytics on conditional text information displayed as hyperlinks.


Vision Operations

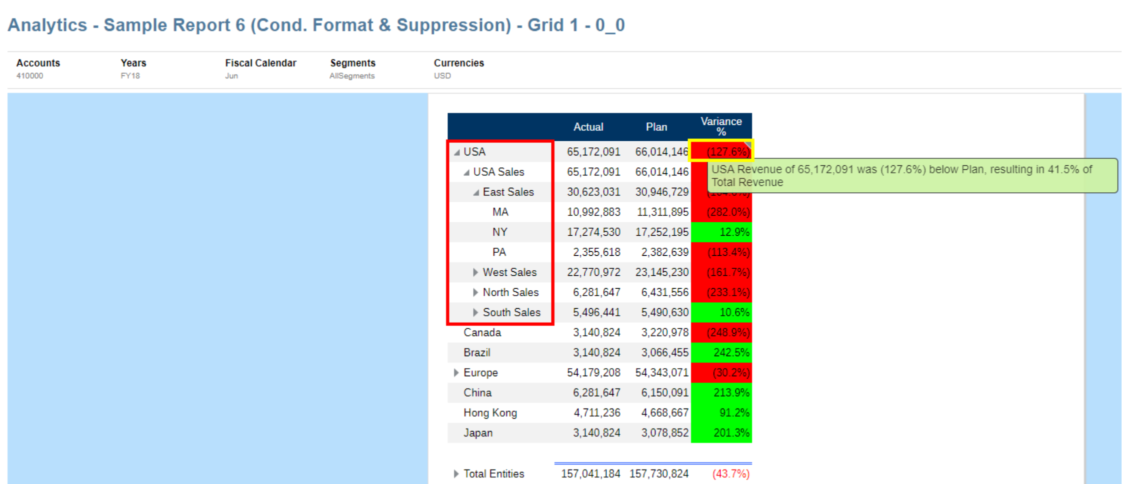
Revenue Variance by Territory
Jun 2018
Report Run Date: Feb 11, 2020 3:06 AM

	Actual	Plan	Variance %
USA	65,172,091	66,014,146	(127.6%)
Canada	3,140,824	3,220,978	(248.9%)
Brazil	3,140,824	3,066,455	242.5%
Europe	54,179,208	54,343,071	(30.2%)
China	6,281,647	6,150,091	213.9%
Hong Kong	4,711,236	4,668,667	91.2%
Japan	3,140,824	3,078,852	201.3%
Total Entities	157,041,184	157,730,824	(43.7%)

Revenue Performance for June:

USA Revenue of 65,172,091 was (127.6%) below Plan, resulting in 41.5% of Total Revenue
Canada Revenue of 3,140,824 was (248.9%) below Plan, resulting in 2.0% of Total Revenue
Brazil Revenue of 3,140,824 was 242.5% above Plan, resulting in 2.0% of Total Revenue
Europe Revenue of 54,179,208 was (30.2%) below Plan, resulting in 34.5% of Total Revenue
China Revenue of 6,281,647 was 213.9% above Plan, resulting in 4.0% of Total Revenue
Hong Kong Revenue of 4,711,236 was 91.2% above Plan, resulting in 3.0% of Total Revenue
Japan Revenue of 3,140,824 was 201.3% above Plan, resulting in 2.0% of Total Revenue

Target Page: You can see the Target grid with some of the row parent members in the zoomed state.


Analytics - Sample Report 6 (Cond. Format & Suppression) - Grid 1 - 0_0

Accounts	Years	Fiscal Calendar	Segments	Currencies
410000	FY18	Jun	AllSegments	USD

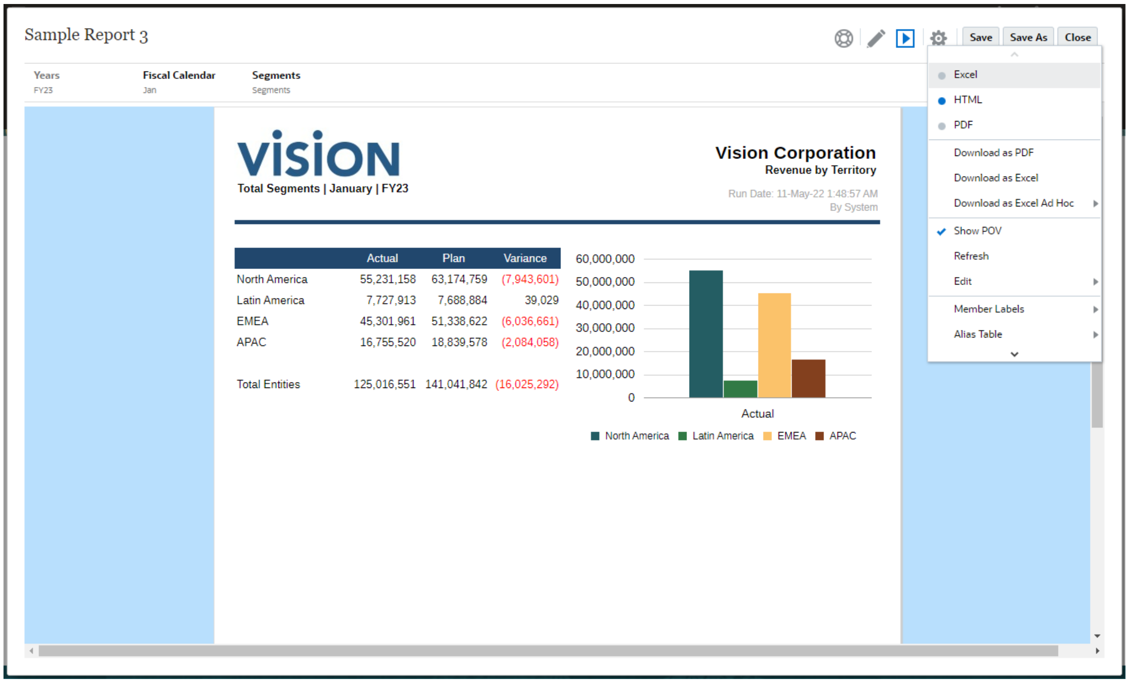
	Actual	Plan	Variance %
USA	65,172,091	66,014,146	(127.6%)
USA Sales	65,172,091	66,014,146	
East Sales	30,623,031	30,946,729	[illegible]
MA	10,992,883	11,311,895	(282.0%)
NY	17,274,530	17,252,195	12.9%
PA	2,355,618	2,382,639	(113.4%)
West Sales	22,770,972	23,145,230	(161.7%)
North Sales	6,281,647	6,431,556	(233.1%)
South Sales	5,496,441	5,490,630	10.6%
Canada	3,140,824	3,220,978	(248.9%)
Brazil	3,140,824	3,066,455	242.5%
Europe	54,179,208	54,343,071	(30.2%)
China	6,281,647	6,150,091	213.9%
Hong Kong	4,711,236	4,668,667	91.2%
Japan	3,140,824	3,078,852	201.3%
Total Entities	157,041,184	157,730,824	(43.7%)

USA Revenue of 65,172,091 was (127.6%) below Plan, resulting in 41.5% of Total Revenue

Viewing Reports

Selecting the **Action** menu enables you to view Reports in different ways.

You can do the following when viewing a report and after selecting :



- Open the report in **Excel** or **HTML** or **PDF**.

> **Note**
>
> – Reports utilizes a metadata cache to speed up member queries and member selection operations such as searches. The cache is generated and populated for each end-user the first time a report is accessed during their session. This may result in a small overhead when a report is first executed.
>
> – If **Print All Selections** is enabled for a POV dimensions, the fixed list of POV members is output to **PDF** or **Excel**, with separate pages or worksheets for each member. All members are retrieved upon report execution for these two formats. The **HTML** preview retrieves only the first POV selection.
>
> – The output of the Report is retained, based on the selection made at the time of previewing a Report. For example, if you change the selection from **HTML** to **Excel**, then each time you execute a Report the output will be rendered in an Excel workbook (refreshable in Smart View) and downloaded to a local machine.
>
> – If the report results are too large to be rendered in the browser (HTML with a grid cell count limit of 180000 or PDF size limit of 10MB), you will be prompted to download the report as a PDF where you can either select OK to download or Cancel to cancel the operation.
>
> – To ensure proper font rendering when using custom uploaded fonts in your report, it is essential to install any custom fonts used on the client machines.

- **Download as Excel** - You can download a Report as an Excel workbook, which can be refreshed in Oracle Smart View for Office. You can later change the POV and respond to prompts, where applicable.
- **Download as Excel Ad hoc** - You can download a Report Grid as Excel Ad hoc in Oracle Smart View for Office, on which you can then perform available ad hoc operations.

> **Note**
>
> Web browser will download a Smart View link file. Click on the file to launch Excel. You will be prompted to sign on to the respective Data Source login page. If you already have an active Data Source connection, the sign-on dialog will not be shown.

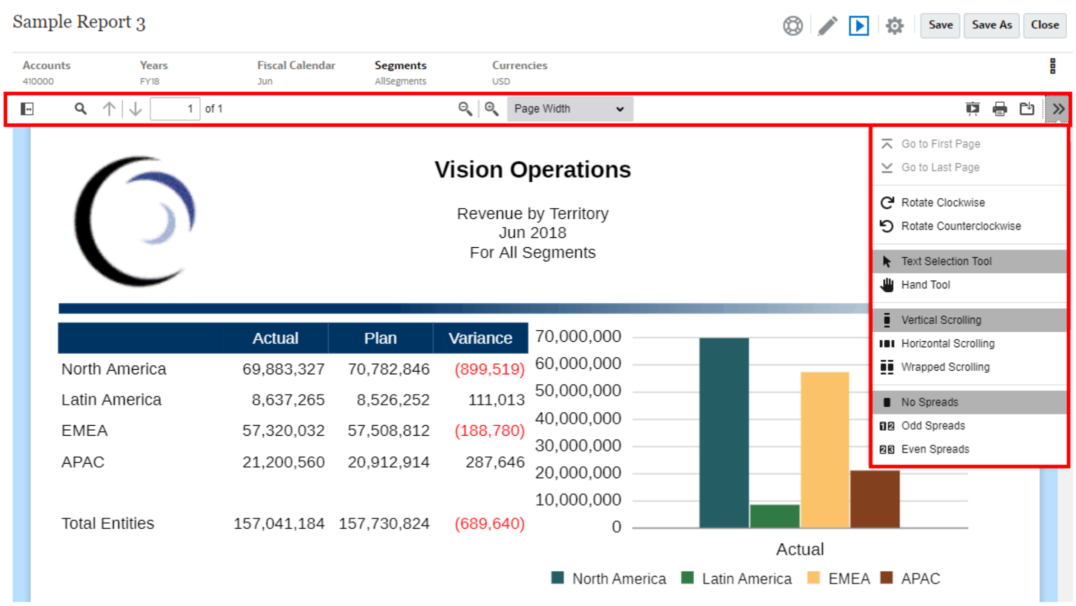
  For more inforamation, see Working with Reports in Smart View

- **Download as PDF** - You can download a Report as a PDF.

  PDF preview of the report provides the following functionality:

  – Toggle thumbnail sidebar
  – Find text within the document
  – Go to the previous/next page
  – Go to an entered page number
  – Zoom in/out buttons

– Select a zoom level (For example: %s, **Automatic**, **Page Width**, and so on.)
– Switch to Presentation Mode
– Print the document
– Download the document
– Other Navigation and Viewing Tools



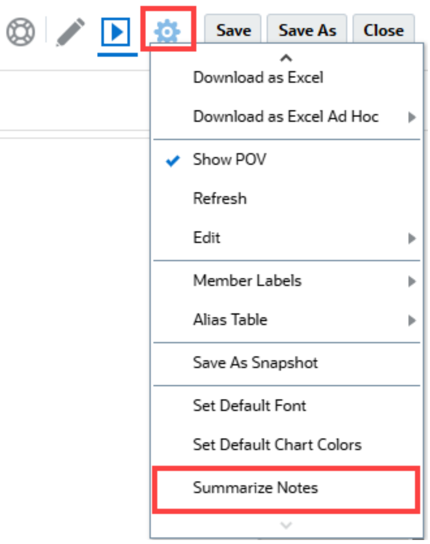
- Show or hide the POV bar
- Refresh the report
- Select how to display a member using member names, aliases, or both.

  You can also select the Alias table used for the report.
- Save a report as a snapshot to a folder you have been given "Write" access to or save it to your My Library folder in the Library.

> **Note**
>
> If your report has drill to content, cell attachments and/or comments defined, the Save to Snapshot action may take extra time to process, as all drill to external content links must be retrieved and processed at save time.

- If the report designer has enabled ad hoc mode, set the zoom options for the grids in the report.

  See Working in Ad Hoc Mode.
- In Narrative Reporting deployments, if there are **Notes** present in the report and the system has Generative AI (GenAI) enabled, you can choose to **Summarize Notes**.



> **Note**
>
> The following  selections are saved for future sessions for that user: HTML or PDF, Show POV, Member Labels, Alias Table, and Zoom settings.

Working in Ad Hoc Mode

If the report designer has enabled ad hoc mode on the report, you can zoom into parent members in any grid in the report. Zooming allows you to expand a row or column parent member to see its children, descendants or bottom level members when you preview a report in HTML. You must set your zoom options before you can utilize this functionality.

To work in ad hoc mode:

1. From the  menu, select **Zoom Options**. (You may have to scroll down to see the menu item.)

   > **Note**
   >
   > The **Zoom Options** menu item is not displayed if the report designer has not enabled ad hoc analysis on the report.

2. To set the zoom level, click **Off** next to Zoom and then select the zoom level that you want to enable:
   - **Off** (default)
   - **Zoom to Children**
   - **Zoom to Bottom**
   - **Zoom to Descendants**

3. In **Zoom Before**, click to toggle between **False** (zoomed in members will display after the parent member) and **True** (zoomed in members will display before the parent member).

Zoom options settings are saved as a preference for each user, for reuse in future sessions with other reports where ad hoc mode is enabled.

Working with Reports in Smart View

In Reports, you can:

- Download a Report as an Excel workbook, which can be refreshed in Oracle Smart View for Office. You can later change the POV and respond to prompts, where applicable.
- Download a Report Grid as Excel ad hoc in Smart View, and you can perform available ad hoc operations.

In Smart View for Excel, you can:

- Import a Report as an Excel workbook.
- Import the Report grids as ad hoc grids, and then perform supported ad hoc operations on the grids directly against the data source, such as pivoting and member selection. You can save the grids and use them as sources for embedded content in report package doclets. See Working with Reports in Smart View.

Related Topics:

- Working with Download as Excel
- Working with Download Grid as Ad hoc Excel

Working with Download as Excel

- When downloading a report to Excel, a new Excel workbook will be created. If "Print All Selections" is enabled for one or more of the report's POV dimensions, each printable page will generate a separate worksheet for each member combination of the report.

> **Note**
>
> The worksheet names will reflect the report name followed by the first POV dimension with "Print All Selections", truncating the sheet name as needed to meet Excel's **31** character limit.

- If connected to Narrative Reporting in Smart View, the report will have Refresh available, where you can change the POV and respond to Prompts, where applicable.
- For the correct thousands and decimal separators to appear in a Report import or export to Excel, a user's Windows regional settings related to data formatting, and Excel advanced data format options for thousand and decimal separators, must be the same as specified in the report designer for the thousands and decimal separators to correctly render in Excel.
- If there is not an active connection in Smart View, the report opens as a static report without the option to Refresh.
- Text boxes in the report are converted to images in the imported Excel worksheet. In some cases, you may need to manually re-size the image box in Excel to match the report presentation.

> **Note**
>
> Report text boxes may appear distorted or with overlapping text when importing or exporting to Excel when the fonts used within the text boxes are not installed on the client machine. To fix this, install the missing fonts used within the text boxes on the client machine.

- Data values in grids are imported into Excel as the scaled value, as defined in the cell number formatting, from the grid. The underlying and unscaled data value from the grid is not carried over to Excel.

  For example, if the underlying unscaled data value in the report grid is `"138,552,696"` and the cell number formatting is scaled as "thousands", where the report preview displays the value as `"138,552"`, in Excel. `"138,552"` will be displayed in the cell, in the formula bar the unformatted value of `"138552"` will be displayed.

For information on differences between Reports and Reports rendered in Excel, see Differences between Reports and Reports Imported in Excel in *Designing with Reports*.

> **Note**
>
> The maximum number of rows and columns supported by Excel in a worksheet is **1,048,576** rows and **16,384** columns. Exporting a report to Excel can result in an error if the limit is exceeded.

Working with Download Grid as Ad hoc Excel

When downloading a grid as ad hoc Excel, the web browser will download a Smart View link file. Click on the file to launch Excel. You will be prompted to sign on to the respective Data Source login page. If you already have an active Data Source connection, the sign-on dialog will not appear.

- The **Download as Ad hoc Excel** option, while viewing a report on the web, is available for **HTML** Preview only.
- Reports Formatting is not retained in Excel.
- The output data in Excel are based on the **Smart View Options**. Review all the **Formatting** settings. For more information, see Setting Smart View Options.
- This feature is not available for hidden grids.

Working with Notes

Notes provide a structured solution for end-users to enter POV-Based narrative text, in a report, either in a Note Box or inline in a Grid utilizing a Note row or column.

Note boxes display Notes in formatted reports along with grids and charts. You can utilize Note boxes where reporting structure and narrative requirements are uniform across Entities, Departments, and so on. In Reports, you can enter Notes in Note boxes where the report designer has inserted a Note Template while previewing a report in HTML.

Inline grid entry of Notes, via a Note column or row, provides POV-based commentary to be entered and displayed directly in the grid while previewing a report in HTML.

Notes can be displayed in reports either in a **Note Template** (one template per Note and POV selection) or in a report using either the **Notes** or **GridNotes** text functions.

The **Notes** text function provides a robust and flexible way to display Notes in a report in a text box.

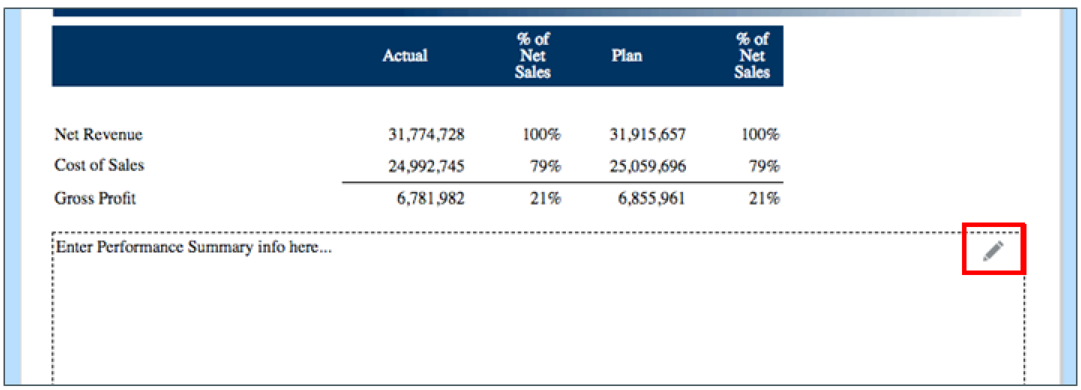
The **GridNotes** text function displays Notes in grid text row, column, or cells, based on the POV of the grid.

> **Note**
>
> This feature is available in Narrative Reporting deployments only.

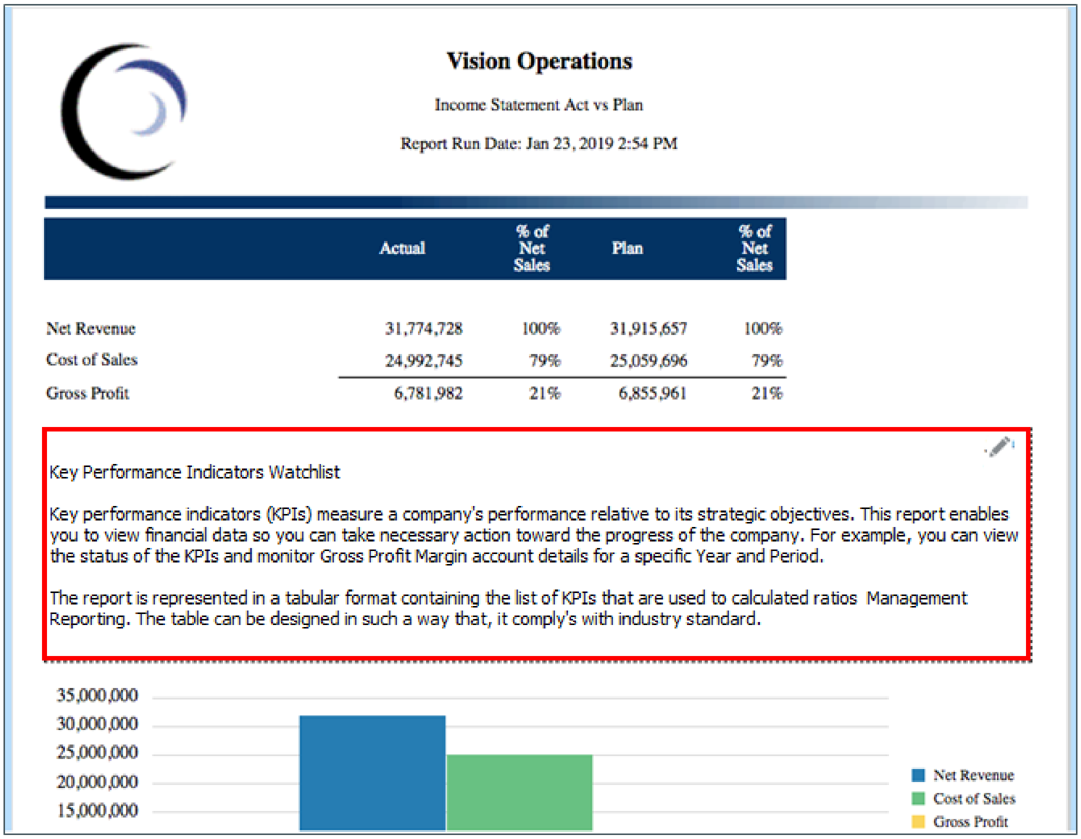
Entering the Note Text on Report Preview

Enter a Note text, while previewing a report.
To enter a Note Text in a Note Box in a report:

1. You can **Preview** the report in HTML and select the desired POV for the report.
2. Click **Edit** in the top right of the **Note** to open the **Note** editor.



3. Displays the Note editor, where you enter text, optionally format it and click **OK** to submit the Note.
4. The Note Text is displayed on Report Preview.



Entering the Note Text via Inline Grid

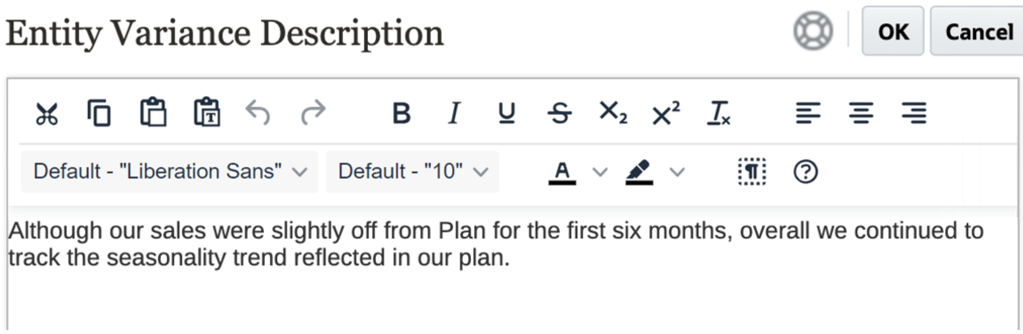
Using the Inline Grid to Enter the Note Text.

> **Note**
>
> When entering **Notes** in a Note row or column segment, the Note entry box allows a user to define different font formatting on text entered within a Note (For example, font type and size, bold, italic, underline, and so on.). However, grid cells only support a single font format, which is defined in the **Cell Formatting** properties for the Note cell, therefore any formats entered in the Note entry box will not be displayed in the Note row or columns segment.

1. You can Preview the report in HTML and select the desired POV for the report.
2. In a Note cell in the grid, click **Edit** in the top right of the **Note** cell to open the **Note Editor**.

	Actual	Plan	Variance	Comments
North America	11,184,452	11,327,818	(143,365)	
Latin America	1,382,348	1,364,680	17,668	
EMEA	9,173,764	9,203,818	(30,053)	
APAC	3,393,036	3,347,275	45,761	
Total Entities	25,133,601	25,243,590	(109,989)	

3. Displays the **Note Editor**, where you can enter the text, and click **OK** to submit the Note.



4. The Note Text is displayed in the Note cell.

	Actual	Plan	Variance	Comments
North America	11,184,452	11,327,818	(143,365)	Although our sales were slightly off from Plan for the first six months, overall we continued to track the seasonality trend reflected in our plan.
Latin America	1,382,348	1,364,680	17,668	
EMEA	9,173,764	9,203,818	(30,053)	
APAC	3,393,036	3,347,275	45,761	
Total Entities	25,133,601	25,243,590	(109,989)	

Working with the Notes Text Box

If a text box is data source-enabled, meaning it has a POV enabled and defined, and it has a Notes text function inserted into it, you can select from a dimension's secondary POV to display the **Children**, **Descendants**, or **Bottom** level members based on the main POV selection. For example, with an Entity selection of **Division A** and the text box secondary POV selection for Entity of **Descendants**, the Notes text function will return the Notes for all descendants of **Division A**.

To work with a Notes text box:

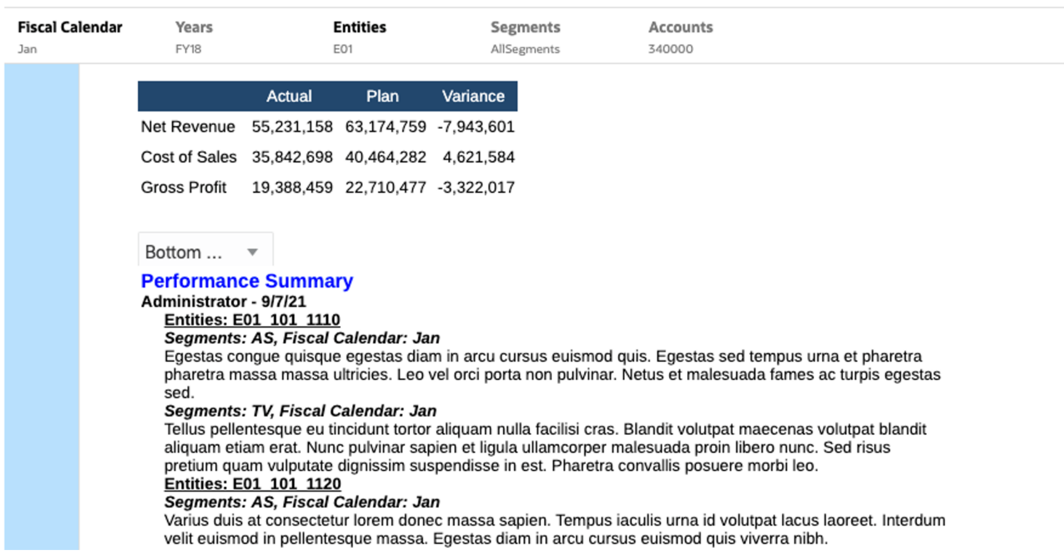
> **Note**
>
> Before proceeding with the following steps, we assume that the text box is data source enabled, the report has a **Named POV** defined, optionally with at least one of the dimensions with **Control by Text POV** enabled to display a secondary POV, and the Notes text function inserted.

1. Open a report with a text box with the **Notes** text function inserted and configured.
2. Change the report's Global POV to retrieve and display Notes in the text box.
3. If the text box has secondary POV selection enabled, you can click on the secondary POV drop-down, and select one of the following available options:
   - **Member (CurrentPOV)**
   - **Children of CurrentPOV**

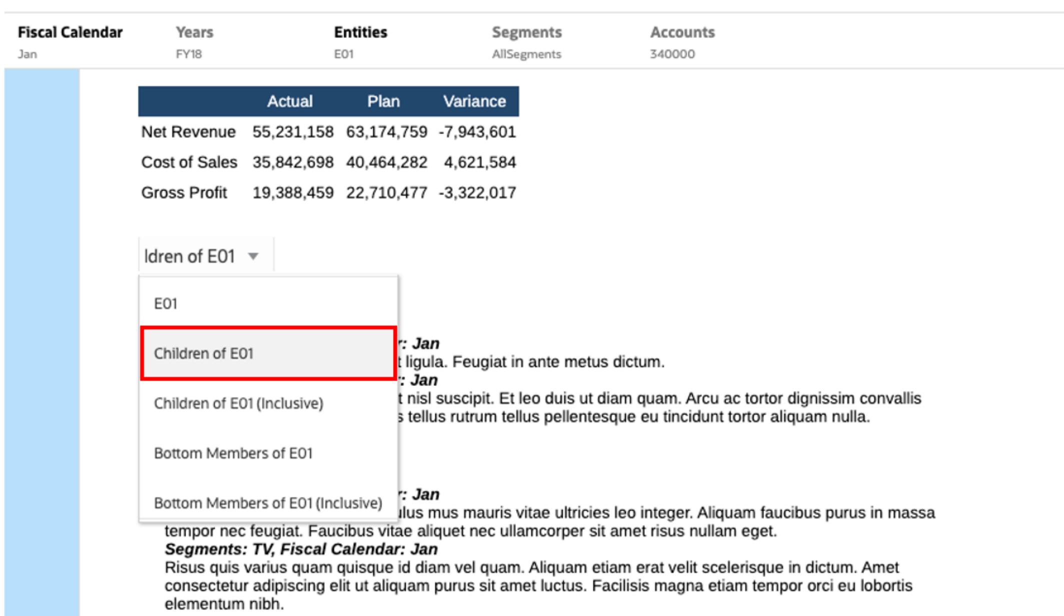
- **Children of CurrentPOV (Inclusive)**
- **Descendants of CurrentPOV**
- **Descendants of CurrentPOV (Inclusive)**
- **Bottom members of CurrentPOV**
- **Bottom members of CurrentPOV (Inclusive)**

Example:

In the following, the Entity **E01** is selected in the report's Global POV. In the text box secondary POV, **Bottom members of E01** is selected, the text box Note text function returns all Notes for the **Bottom of E01**.



When selecting **Children of E01**, a smaller list of **Notes** is displayed in the text box.



3

Viewing and Interacting with Books

Learning About Books

Books provide the ability to group together one or more Reports, Books and other documents, to generate a single PDF output. You can optionally include a customizable Table of Contents (TOC), using a Word document with a TOC definition inserted, and common margins, page headers and footers.

Reports can be run for multiple member selections. For example, you can run one or more reports for several **Departments** or **Entities**. You can insert **Sections** to loop through multiple reports and member selections. **Sections** can also be used to group reports at one level for TOC display.

High level features include:

- You can insert Reports, other Books, Word and PDF documents into the Book. Word and PDF documents need to be uploaded to the Library, they cannot be inserted from a local file system.
- You can customize the Table of Contents formatting and layout, as well as the information displayed for each document in the Book.
- You can select Point of View (POV) members to cascade for each report or section.
- You can select the POV at the time of executing the Book.
- You can create multiple levels of Sections that can be utilized to cascade at different hierarchy levels and dimension selections.
- You can use **Page Setup** feature to define page numbers, margins and header and footer.

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

- In first release, Books feature is limited to one data source per Book.
- You must set the Prompts from the Book Designer, and cannot be responded to at runtime when running the Book.
- When you add a PDF or Microsoft Word file to a book, then user POV bar is not displayed for such document.

> **Note**
>
> When you add a document to a book, it is referencing a link to the library. The actual document will not be copied to the book.
>
> Actually, the TOC definition gets copied to the book, and it is not linked to the source document in the Library.

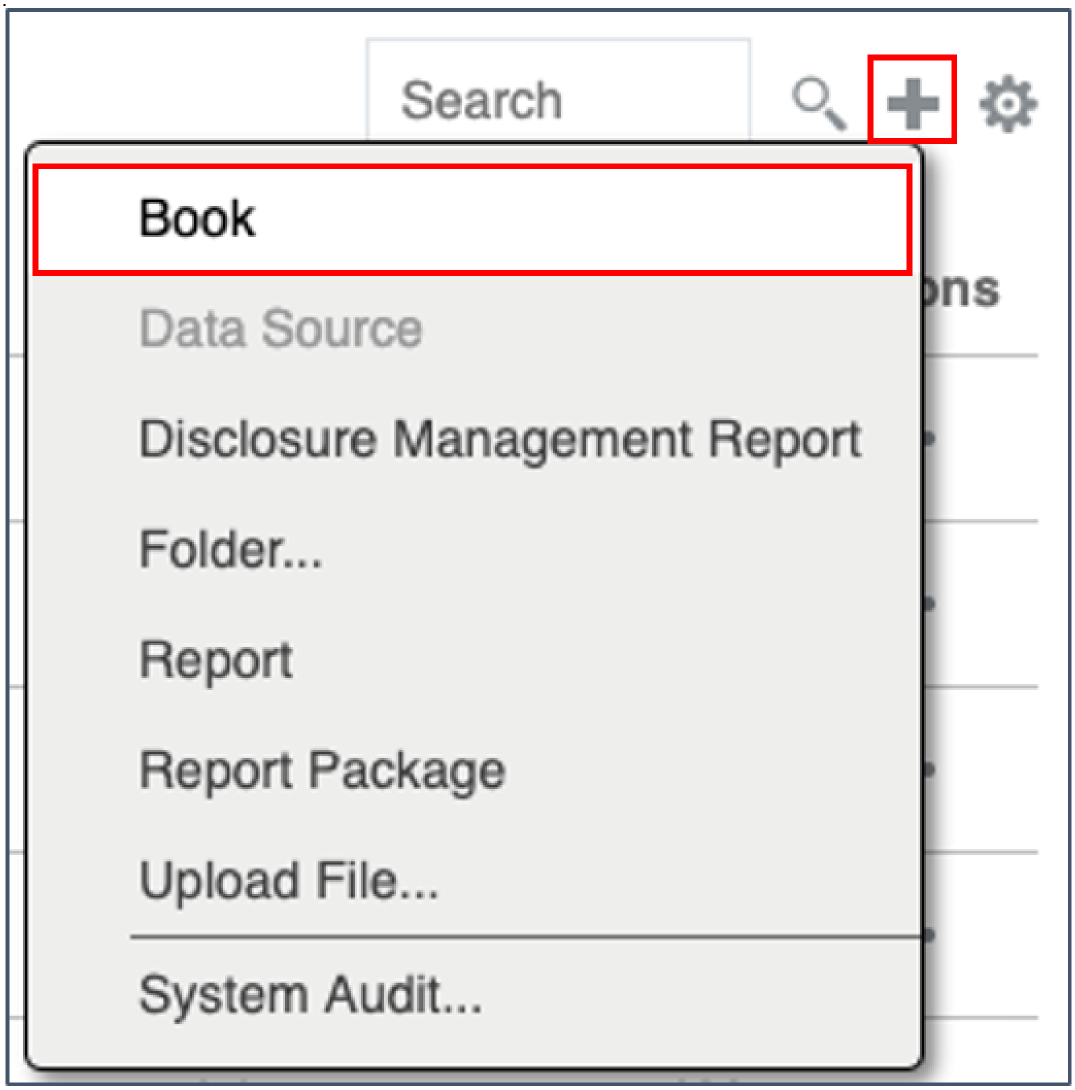
Accessing Books

For Narrative Reporting Deployments:

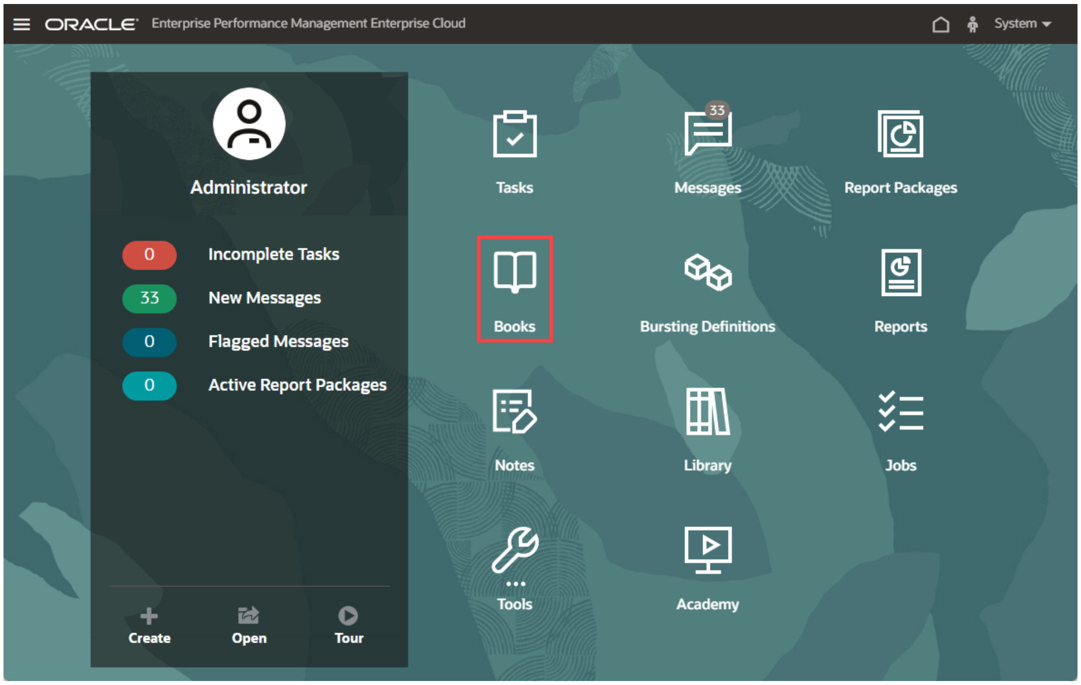
You can access books by selecting **Books** or the **Library** card from the Home page.

To access Books from Narrative Reporting:

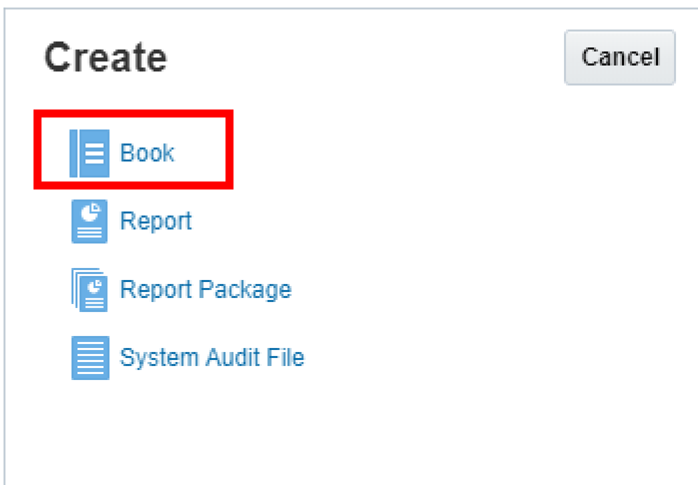
1. You can create **Books** from the Book system folder or any non-system folder, click and select **Book** from the menu.



2. From the **Books** panel, click .



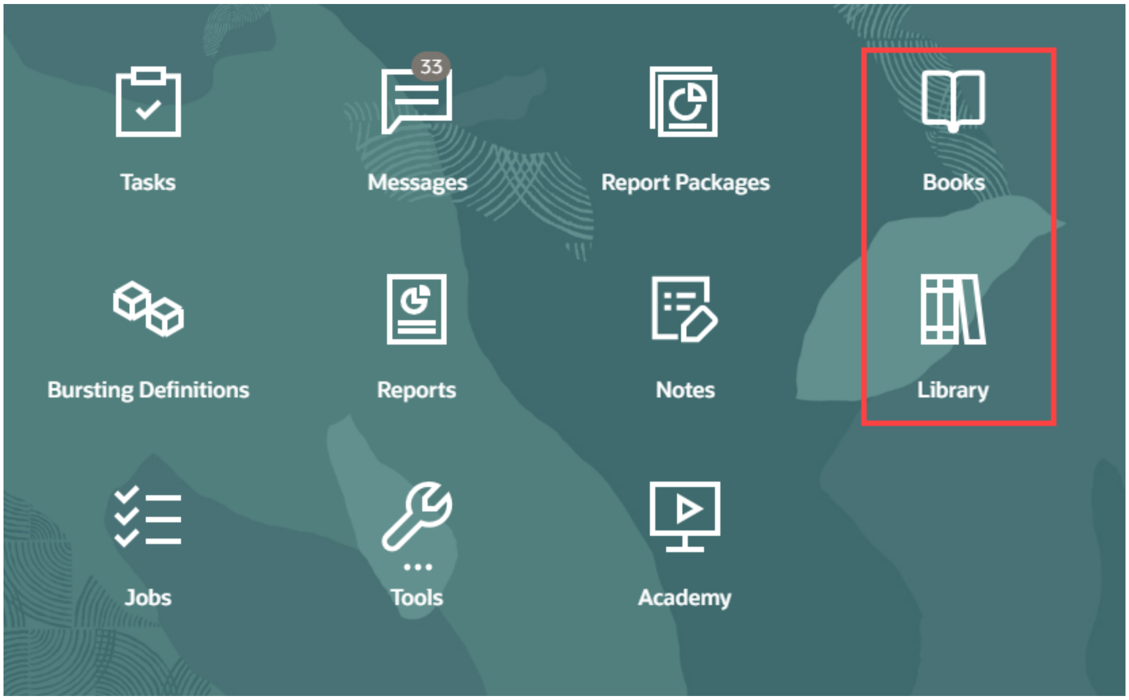
3. From the home screen, click **Create**, and select **Book**.



> **Note**
>
> In the books panel, you can filter the list of existing books on Recent, Favorites, and All.

For more information, see Welcome to Narrative Reporting and Learning about the Library.

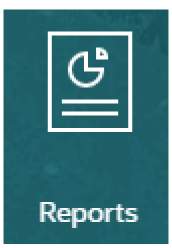
When you start navigating from **Home** page, you can access **Books** from the system generated **Books** folder in, from personal folders you created or have been granted access (View permission) in the **Library**, and from the **Home** page as displayed in the image below by selecting the **Reports** or **Library** icons



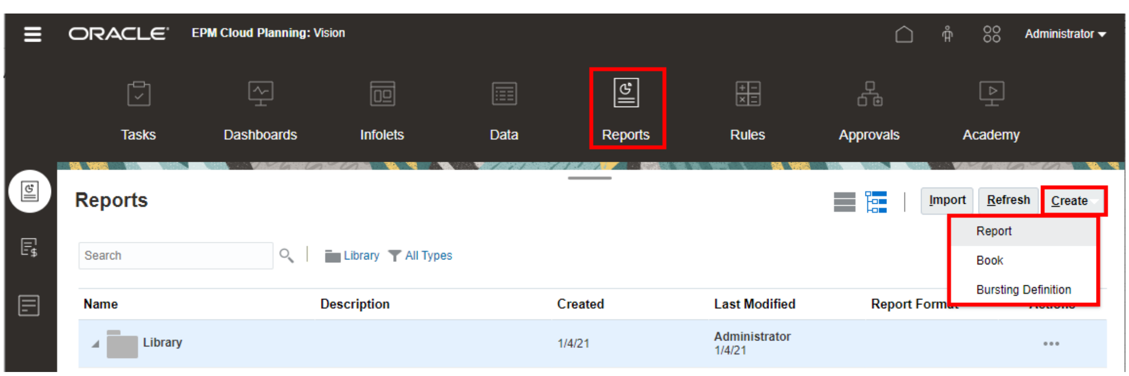
For Enterprise Performance Management Cloud Deployments:

You access the Book Creation Window:

From an Oracle Fusion Cloud Enterprise Performance Management service, select



Report card, and from the left pane select **Reports** icon, and click **Create** drop-down menu at the top of the content pane, and then click **Book** to launch the Book Creation Window.



> **Note**
>
> However for Tax Reporting Cloud Services, you need to navigate to the **Library**, and then select the **Reports** tab.

Previewing a Book

About Previewing A Book

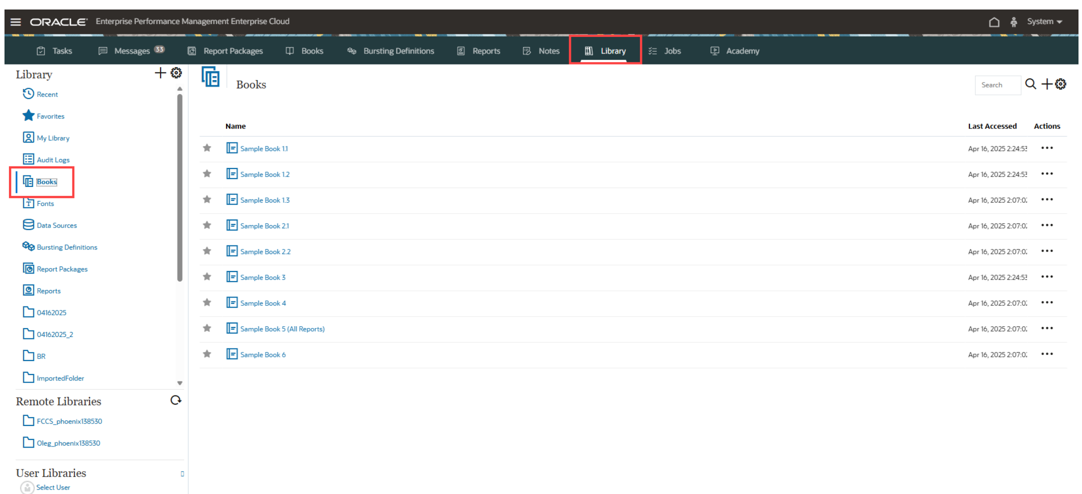
If you have the *Viewer* role and depending on the selections that are set by the **Book Designer**, you can select members for the available POV dimensions when previewing a book.

POV dimensions are displayed at the top of the book, see Previewing the POV of a Book

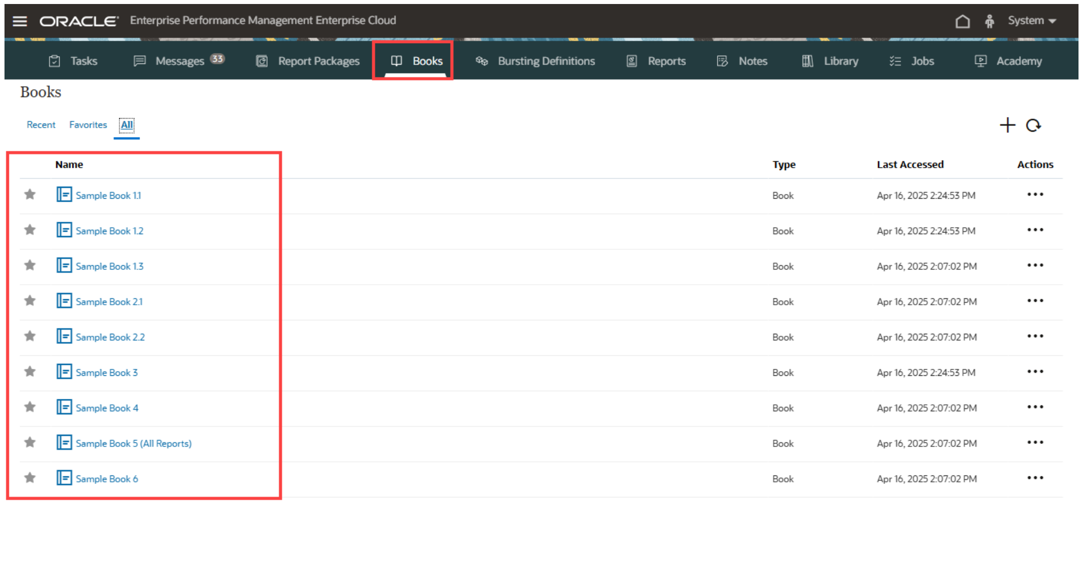
To preview a Book:

In Narrative Reporting deployments, you can either:

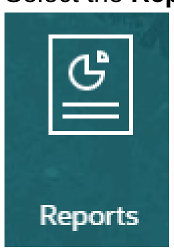
1. Select a book from the **Library** card.



2. Select a book from the **Books** card.

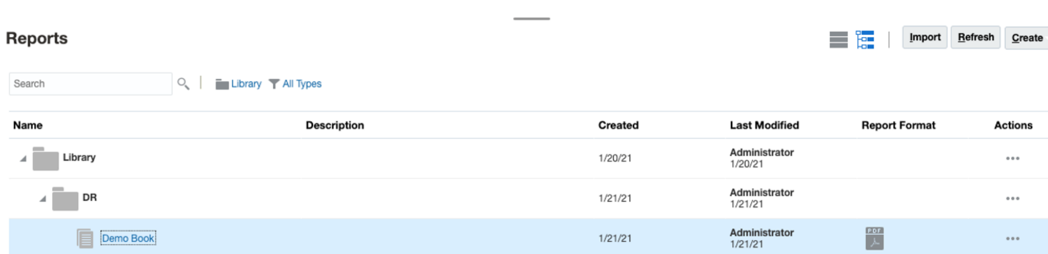


In Oracle Fusion Cloud Enterprise Performance Management deployments:

1. Select the **Reports**


card (Library card in Tax Reporting). In Enterprise Profitability and Cost Management, FreeForm, Planning, and Planning Modules, from the left pane select **Reports** icon. In Financial Consolidation and Close, and Tax Reporting, select **Reports** from the horizontal tabs.
2. Select a book and click on the


icon to launch the book in PDF preview.



Selecting Members for the Book POV

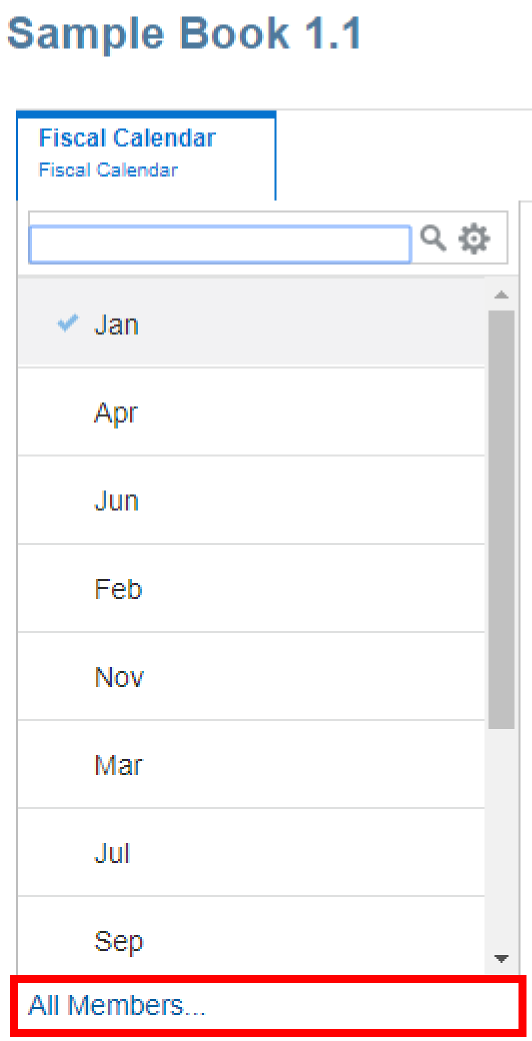
To set the Book Point of View:

1. Open a Book in edit mode of Book Designer.

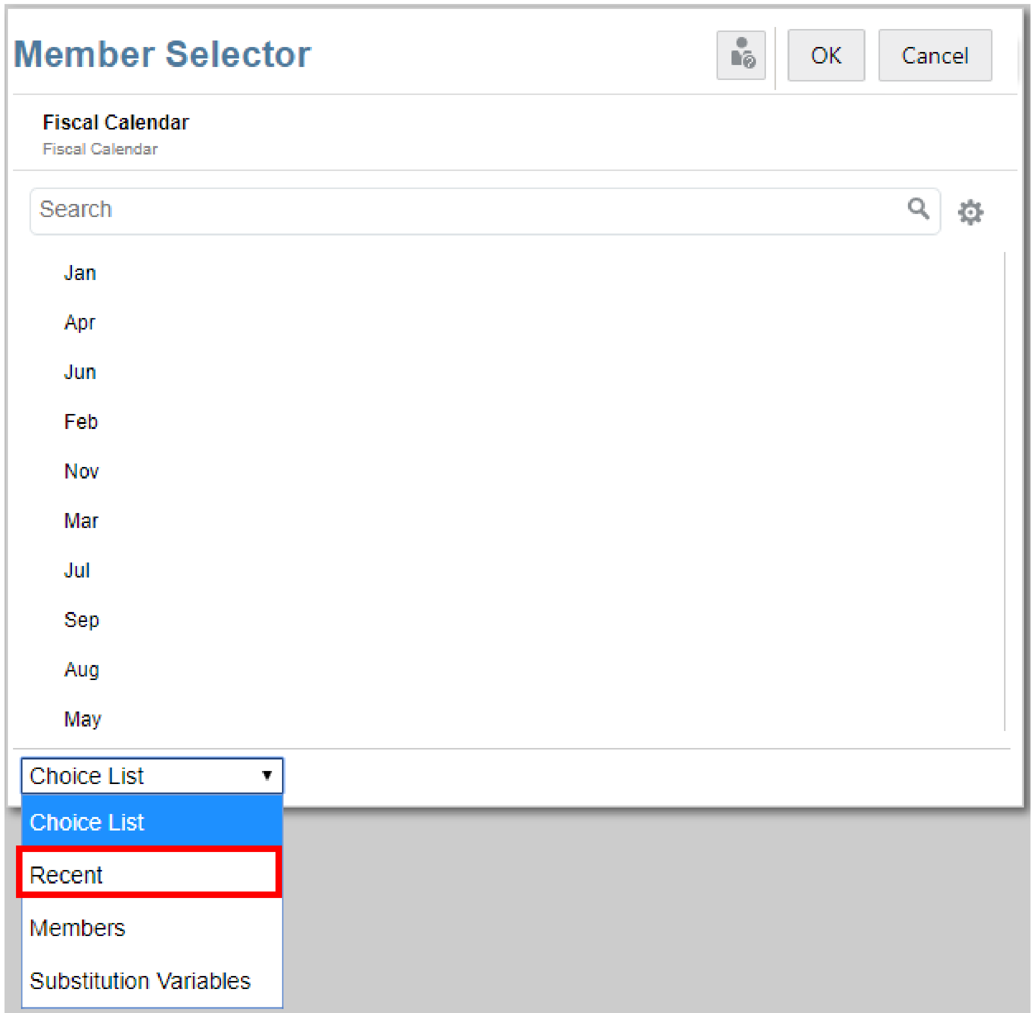
2. In the POV bar at the top of the Book Editor, click on a dimension label to open the member selector for that dimension.

> **Note**
>
> If a POV dimension is disabled (gray colored label), then you are not able to change the POV selection for that dimension.

3. If a single POV member is displayed in the Book Designer. While previewing the Book, you can click on the member in the POV bar, and then make a selection for that dimension by selecting **All Members...** to open the **Member Selector** dialog to select additional members.
   - By selecting **All Members...** to open the **Member Selector** dialog to select additional members.



   - ***Optional:* Recently** selected members for the same dimension are also listed.



- ***Optional:*** If multiple members are listed in the POV member list, select a member from the list.

4. Continue selecting members and setting POV options for the remaining POV dimensions as needed.

> **Note**
>
> When using substitution and user variables as selections for the Book Point of View, the Variable values are retrieved when the system first connects to the data source. The member selector and/or POV will display the Variable's value. When running a Book, the latest Variable value will be retrieved for the reports in the Book. However, if a Variable value changes during a user's session, the change will not be reflected in the Variable value displayed in the Book's member selector or POV, until the user reconnects to a new session by logging out and logging in again.

Responding to Book Prompts

If a report designer has added prompts to the Global POV (where **Print All Selections** is enabled), grid columns, or grid rows, you select the members for the prompts from the **Select**

Members dialog box when you preview the report. You can also manually enter prompts with the following behaviors and limitations:

- Enter member (unique) name or alias based on whichever is being displayed for the prompt in the runtime prompt dialog.

> **Note**
>
> For selecting shared members, unique member name as displayed in the user interface needs to be entered.

- You can enter multiple members for multi select prompts by using comma as a separator. If your member names contain commas, you will need to use the member selector instead of manually entering the multiple prompts.
- Member input is case sensitive.
- If there are invalid entries, you will need to address them before being able to leave the dialog except by clicking **Cancel**.

If reports in the book contain prompts, you can respond to the prompts when running the book. You can select from a choice list that the designer specified, or from all members of a dimension that you have access to if the designer did not specify a choice list.

When previewing a book, when responding to prompts, you can either use:

- **Full Mode**: displays all prompts in all reports and inserted books separately.
- **Compact Mode**: consolidates duplicate prompts (same dimension, prompt label, choice list, default selection, and "Allow Multiple Selections" setting for the same data source) across reports.

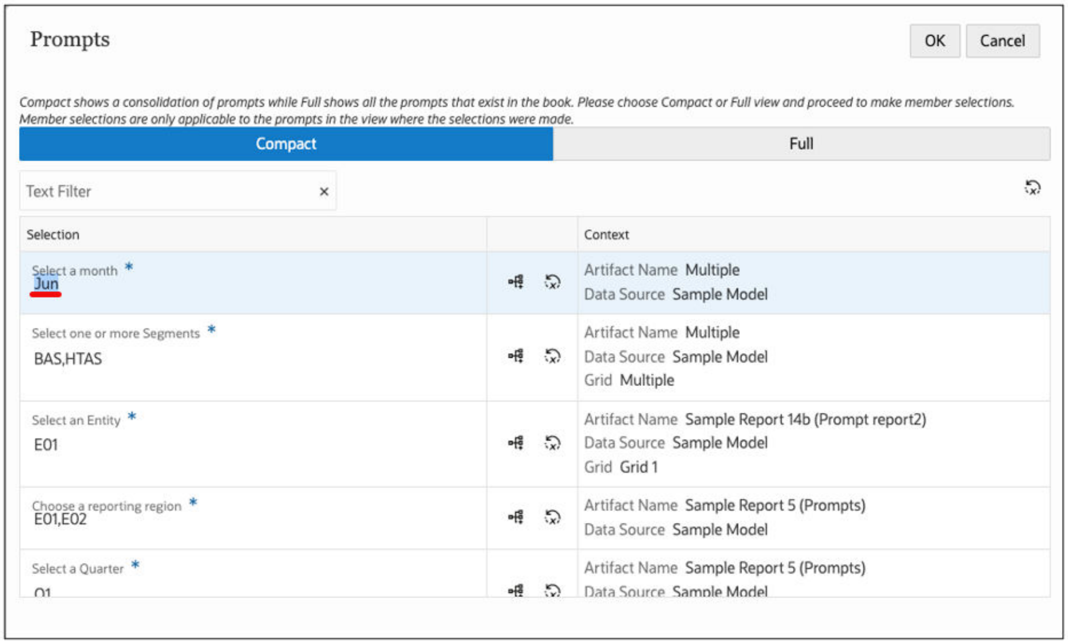
To respond to prompts when previewing a book:

1. You can preview a book by either clicking on the book in the Library, or when editing a book click on **Preview**.
2. The **Prompts** dialog will appear if there are prompts in the report(s) in the book that have been configured with **Prompt For Value On Preview** enabled. The Prompts dialog has two modes: **Compact** and **Full**.
3. Select **Compact** to view duplicate prompts (same dimension, prompt label, choice list, default selection and "Allow Multiple Selections" setting, for the same data source) across reports consolidated.

   OR

   Select **Full** to view all prompts in all reports and inserted books separately.

   > **Note**
   >
   > - Selections are only applicable to the mode (Compact vs Full) where the selections were made.
   > - Prompts will be exposed for an inserted book at the "node" level and always show a **Compact** list of all the prompts in the inserted book.



4. For each prompt, click **Select Members**  to open the member selector and make the desired selection, or manually enter the prompt selection. You can also click **Reset All Prompt Selections**  to reset any prompt selection changes to the original report prompt selection.
5. Once all prompts have been selected, click **OK** to proceed with the book preview.

Previewing the POV of a Book

If Preview POV has been selected in the **User Preferences**, then opening or previewing a book requires selecting

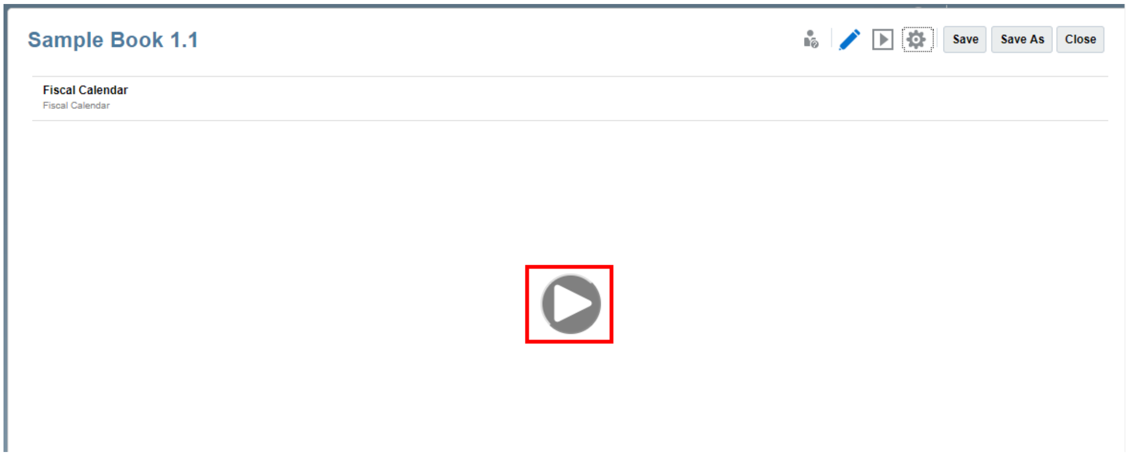
to refresh data.

In Narrative Reporting deployments:

Go to the **Report Preferences** tab. See Manage User Preferences.

In Oracle Fusion Cloud Enterprise Performance Management deployments:

Go to the **User Preferences** tab, and then **Reports**.



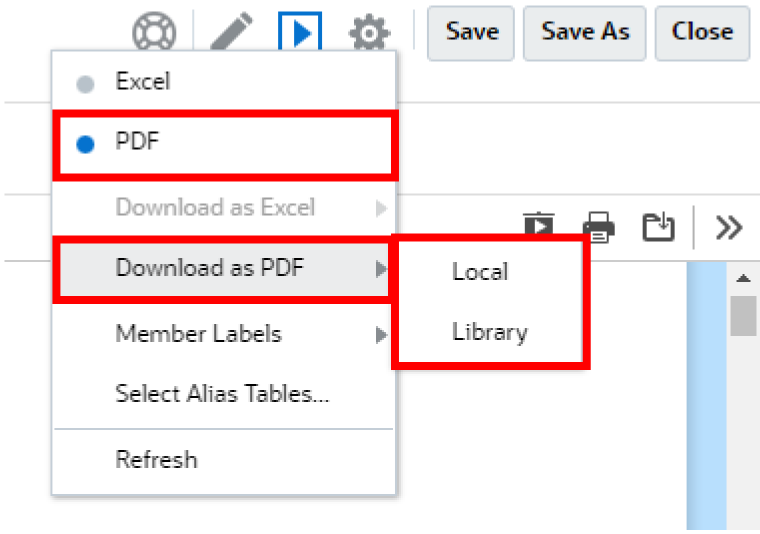
Viewing Books

While viewing a Book, you can perform the following tasks, by selecting **Action** menu options.

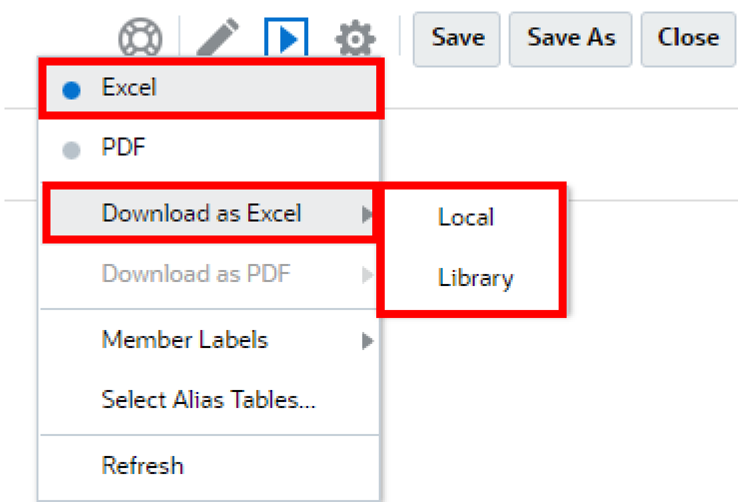
> **Note**
>
> The output type of the Report is retained, based on the selection made at the time of previewing a Report. For example, if you change the selection from **HTML** to **Excel**, then each time you execute a Report the output will be converted Excel workbook and downloaded to a local machine.

To switch your preview mode:

- If you select **PDF**, the Book will be executed in PDF format, and you can select **Download as PDF**, and then you can either select **Local** or **Library**.



- If you select **Excel**, the Book will be executed and converted Excel workbook. You can download the file locally. Also, you can select **Download as Excel** and select either to **Local** or **Library**.



  When downloading a book as Excel:
  - Only Reports are included in the Excel output. If book contains **Word** or **PDF** documents, or inserted Books, they will not be included in the **Excel** output.
  - A table of contents (TOC) sheet is generated with links to individual report worksheets, based on the TOC Headings defined in the **Properties** panel in the Book Designer. Since Excel's maximum number of worksheet characters is **31**, the worksheet names will be truncated to fit the 31 character limit, where applicable.
- You can **Refresh** the book.

- You can display POV member by clicking **Member Labels**: **Alias** or **Member Name**, or **Both**.
- You can select the **Alias Table** for the book.

The following governors in books from a sizing and book execution standpoint.

- If there are more than 500 cascade expressions, which is the combination of all POV dimension selections for all sections and reports, the book will not execute and will return a ***maximum cascade expressions*** error. This maximum is the product of all POV dimension selections.

  For example, if you have a section with two POV dimensions and the following number of selections:

  - `Entity = 100 selections`
  - `Account = 6 selections`

  `100 x 6 = 600`, which is above the allowed governor amount.
- If the number of cascade expressions which are executable (Books or reports) is over `200`, the book will not execute and will return a ***maximum cascade expressions*** error. This maximum is the number of all resulting book and report outputs, based on the POV selections.

  For example, if you have a sections with one POV dimension that has `100` selections with three reports:

  `100 x 3 = 300`, which is above the allowed governor amount.

4

Working with Reporting Artifacts in Remote Libraries

Remote Libraries in Narrative Reporting allow you to access reporting artifacts in Oracle Fusion Cloud Enterprise Performance Management platform instances on the same domain. In the Narrative Reporting Library, users can browse remote libraries for reporting artifacts to **Open**, or to **Copy** Reports from the Cloud EPM Platform to Narrative Reporting.

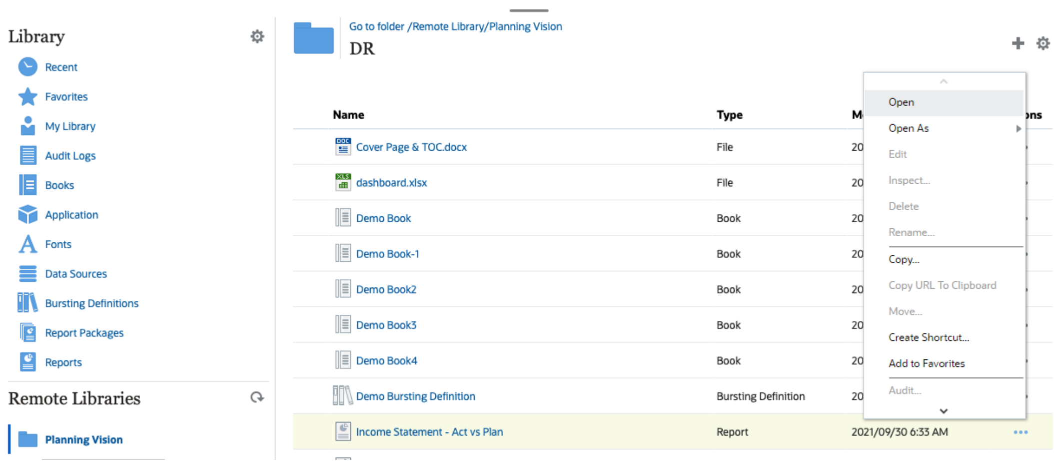
Supported artifacts include **Reports** and **Report Snapshots**, **Books**, **Bursting**, **Microsoft Office** files, and **PDFs**.

> **Note**
>
> - **Remote Libraries** are configured by the Service Administrator.
> - Narrative Reporting users accessing a Remote Library need to be a user and must have access permissions to artifacts on the **Connections**.
> - **Remote Libraries** cannot be enabled to access other Narrative Reporting instances, only Cloud EPM Platform instances (Enterprise Profitability and Cost Management, FreeForm, Planning, and Planning Modules, Financial Consolidation and Close, Tax Reporting).
> - You cannot edit any of the artifacts in a Report Library. You can only open any of the artifacts or copy Reports. Artifacts can only be edited directly in the Cloud EPM instance and not from the **Remote Libraries** in Narrative Reporting.

To access a Remote Library and its reporting artifacts:

1. In the Narrative Reporting Home page, select **Library**.
2. In the left panel, under **Remote Libraries**, click on a remote library to browse.

   The remote library's folders and artifacts will be displayed in the **Library** right panel. You can select folders and subfolders to browse content.



3. You can perform the following actions on the different Artifact types:

Table 4-1 Perform an action on the each of these Artifact types

Artifact Type	Access Point	Actions
Reports and **Report Snapshots**	Actions Menu	• **Open** • **Open As: HTML, PDF**, or **Excel** • **Copy** • **Create Shortcut**
Books	Actions Menu	• **Open** • **Open As: PDF** or **Excel** • **Create Shortcut**
Bursting Definition	Click on artifact name	• **Open** • **Create Shortcut**
Microsoft Office files and **PDFs**	Click on artifact name	• **Download the file** • **Create Shortcut**

Creating a Shortcut For Remote Library Artifacts

> **Note**
>
> Remote Libraries in Narrative Reporting allow you to access reporting artifacts in **Oracle Enterprise Performance Management Cloud** platform instances on the same domain.

To create a shortcut from a Remote Library, perform these steps:

1. Log into **Narrative Reporting Cloud**.
2. In the Narrative Reporting Library, under **Remote Libraries**, select a remote library and highlight a **Report**, **Report Snapshot**, **Book**, **Bursting Definition**, or a third-party file, and then click the **Actions** icon to select **Create Shortcut** from the Cloud EPM Platform to Narrative Reporting.
3. Choose a destination folder in the **Narrative Reporting Library**, and click **OK**.

> **Note**
>
> Remote Libraries are configured by the Service Administrator. If an administrator log into the **Remote Library** and deletes the artifact or third-party file, then all the shortcuts that are pointing to that remote library artifact or third-party files will be redundant in the local, as in the Narrative Reporting Library.

5

Copying a URL for Reports and Books

The **Copy URL to Clipboard** feature provides the ability to copy the URL of a Library artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file. The URL will launch the artifact directly into a thin viewer or download the third-party file. Once copied, the URL can be distributed so users can easily access the artifact or file via a direct link. It can also be set up as a browser favorite.

The thin viewer that is launched with a native Library artifact allows basic functionality from the **Actions** menu, without the ability to **Save** the artifact. This feature is available in all Library systems and user-created folders (including cards on the **Home** page), and all users with at least View permissions to an artifact can copy a URL.

> **Note**
>
> - This feature is not available for multiple selections, only a single selected artifact.
> - This feature does not apply to folders.
> - The user launching the copied URL will need at least View access to the artifact.

Copying a URL for Report or Book

To copy a URL, perform these steps:

1. Log into Narrative Reporting Cloud. On the **Home** page, select **Reports**, **Books**, or **Library**.
2. Navigate to a **Report** artifact, highlight a **Report**, **Snapshot Report**, or **Book**, and then click the **Actions** icon to select **Copy URL to Clipboard**.
3. Paste the URL where needed. Upon clicking on the URL, the Report artifact will be launched in a browser window.