

# Oracle® Fusion Cloud EPM

## Learning About Narrative Reporting



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Oracle Fusion Cloud EPM Learning About Narrative Reporting,

E94336-25

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# Documentation Accessibility

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## **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](mailto: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 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 Narrative Reporting

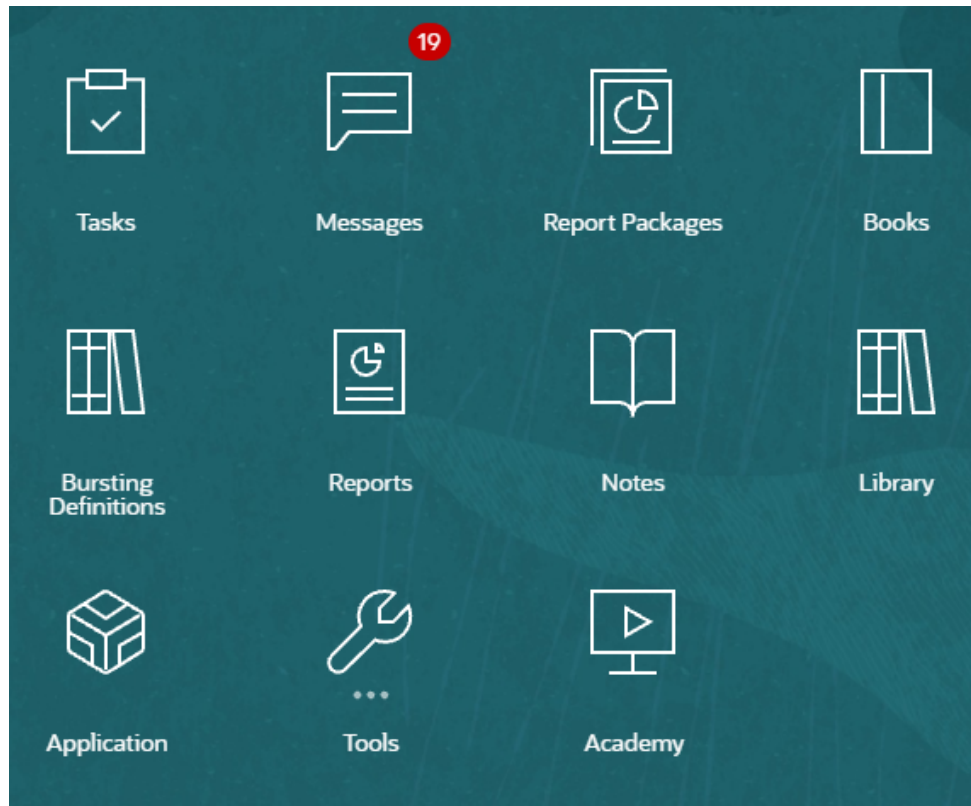
### Related Topics

- [Icons](#)  
Icons are used to define areas on the Home Page.
- [Settings and Actions Menu](#)  
This menu has options to select from, based on you role.
- [User Assistance](#)  
This menu is used for help on Narrative Reporting, a place to connect with other members, the support site, and to provide feedback.
- [Accessibility Settings](#)  
Use this for accessibility.
- [Welcome Panel](#)  
Quickly displays your status, create, open, or take a tour.
- [Conventions Used](#)  
These are the most popular icons used in Narrative Reporting.
- [Roles and Permission-Based Access](#)  
Based on your roles provisioned, you have access to certain roles.
- [Which Tasks Should I Do First?](#)  
Explains, to an administrator, what tasks to do.
- [How Do I Get Additional Help](#)  
This explains how to obtain user assistance.
- [Configuring SPF Record for Oracle Cloud Email Verification](#)  
Oracle publishes Sender Protection Framework (SPF) policy that identifies the Oracle server IP addresses and subnets that are permitted to send cloud services emails.
- [Using Translations](#)  
This tells you the languages translated for Narrative Reporting.

## Icons

Icons are used to define areas on the Home Page.

There are up to thirteen main icons accessible from the Home Page for a System Administrator.



 **Note:**

The above image is captured using the **Redwood** theme. Click **Tools**, and then select **Appearance**. Explore the default Redwood theme.

**Tasks**

Displays tasks to perform such as reviewing a doclet or signing off on report packages.

**Messages**

Displays notifications about actions you need to take or others took; for example, confirmation that an export file was created.

**Report Packages**

Displays the list of report packages that you can access.

**Books**

Displays the list of books that you can access.

**Reports**

Opens Reports.

**Notes**

Opens the Note Manager.

**Bursting**

The ability to run a report or book for more than one member of a single dimension for one data source, generating a PDF output for each member.

**Library**

The central repository for report packages, folders, and artifacts such as audit files as well as an application.

**Application**

Used to create a sample or custom application that stores data in the Oracle Cloud for Narrative Reporting.

**Tools**

The **Tools** card links to the following tasks in Narrative Reporting: **Access Control**, **Appearance**, **Clone Environment**, **Connections**, **Daily Maintenance**, and **User Preferences**.

**Access Control**

Used by administrators to can create and manage group, where as in Narrative Reporting, an Application Administrator can create and maintain all artifacts, such as applications, models, dimensions, and data grants.

**Appearance**

Used by administrators to set default display options for all users. For example, a company logo and background logo for the Home page.

**Clone Environment**

Used by administrators to perform a Clone Snapshot on a specific target instance.

**Connections**

Used by administrators to create and manage remote connections directly from the Narrative Reporting Cloud page.

**Daily Maintenance**

Used by administrators to set the daily maintenance time and perform backup and restore actions.

**User Preferences**

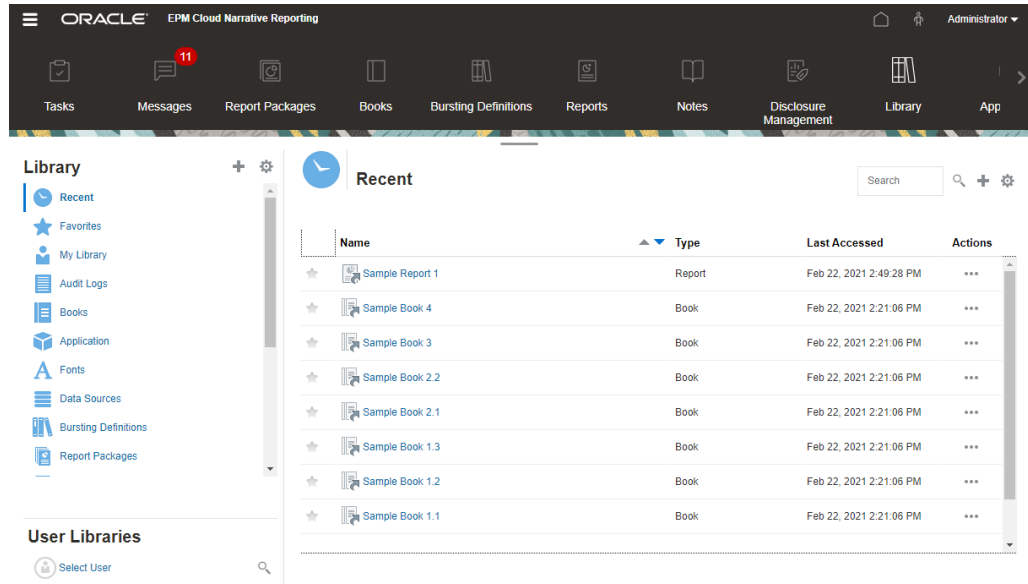
Used by administrators to upload a photo, set your language and time zone, set notification email addresses, and customize other display items.

**Academy**

Displays links to videos and to the Cloud Help Center on using Narrative Reporting.


**Navigating the Icons**

After you leave the Home Page, a springboard is displayed with icons at the top of your page. An indicator points to your location on the springboard. In the example below, the **Library** icon is being selected and pointed to.



Select another icon to move to it.

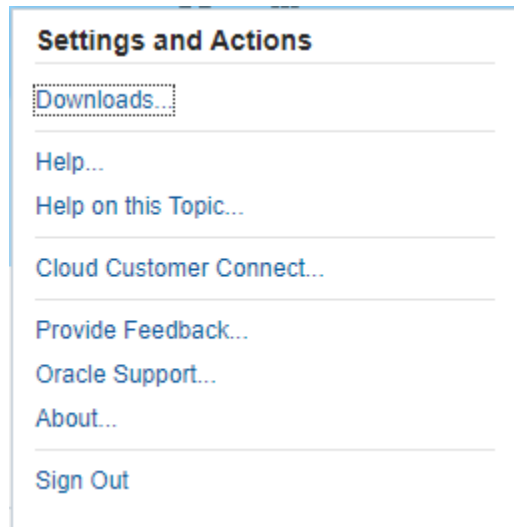
### Navigating to the Home Page


Use the Home icon  in the upper right area of the Home page to return to the Home Page.

## Settings and Actions Menu

This menu has options to select from, based on you role.

The actions from the Settings and Actions menu are:



Select the caret  beside your user name to display the Settings and Actions menu.

### Preferences

Upload a photo, set your language and time zone, set notification email addresses, and customize other display items. See [Managing User Preferences](#).

### Downloads

Depending on your assigned roles, allows you to install the following client software:

- Sample Content – Selecting the Get Sample Content displays an information message that upload samples has completed and the Samples folder has been created at the Library root folder. See [Install Samples](#).
- Oracle Smart View for Office – Download the latest version of Smart View from the [Oracle Smart View for Office software download page](#). See [Setting Up Narrative Reporting in Smart View](#).
- Smart View Extension for Narrative Reporting. Allows users to perform assigned tasks and analyze model data from within the Microsoft Office suite.
- Smart View Extension for Disclosure Management. Allows users to perform Disclosure Management activities, including tagging, validation and instance generation from within Microsoft Word.
- Smart View Extension for Disclosure Management Auto Tagging. Provides the ability to perform high volume XBRL for auto tagging as part of Disclosure Management from within Microsoft Excel.

### Help

Access videos and other task-related topics in the [Oracle Cloud Help Center](#).

### Help on this topic

Access specific help for a topic.

### Cloud Customer Connect

Cloud Customer Connect is an exclusive community for members to connect with other members and discuss issues or share ideas. Select this option for a direct link to Cloud Customer Connect to access:

- Discussion forums to pose questions, explore ideas, and discuss Oracle Applications.
- News about upcoming events that showcase new release functionality, industry best practices, and more.
- Documentation and videos to help you prepare for a successful transition to the latest release.
- Idea Labs to share your ideas on product enhancements, vote, and comment on your favorites.

After you sign in, you can select **Enterprise Performance Management** to navigate directly to your Cloud product, to view release information, tips and tricks, and other posts.

### Provide Feedback

A diagnostic utility called **Provide Feedback** is available within your Enterprise Performance Management cloud service. If you encounter an issue while using the service, use the Provide Feedback utility to describe the issue and the steps to reproduce it. See [Helping Oracle Collect Diagnostic Information Using the Provide Feedback Utility](#).

### Oracle Support

My Oracle Support site.

### About

Contains Narrative Reporting notices and version information.

### Sign Out

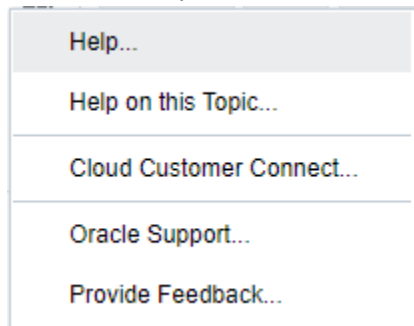
Exits Narrative Reporting.

## User Assistance

This menu is used for help on Narrative Reporting, a place to connect with other members, the support site, and to provide feedback.



A User Assistance icon is available on certain screens. Click the icon to display the available options.



### Help

This option displays help for Narrative Reporting.

### Help on this Topic

This option displays online help for the current topic, if available.

### Cloud Customer Connect

Cloud Customer Connect is an exclusive community for members to connect with other members and discuss issues or share ideas. Select this option for a direct link to Cloud Customer Connect to access:

- Discussion forums to pose questions, explore ideas, and discuss Oracle Applications.
- News about upcoming events that showcase new release functionality, industry best practices, and more.
- Documentation and videos to help you prepare for a successful transition to the latest release.
- Idea Labs to share your ideas on product enhancements, vote, and comment on your favorites.

After you sign in, you can select **Enterprise Performance Management** to navigate directly to your Cloud product, to view release information, tips and tricks, and other posts.

## Oracle Support

Select this option to navigate directly to the My Oracle Support site to search for solutions, download patches and updates and create a service request.

## Provide Feedback



### Note:



Only in User Assistance Menu.

If you encounter an issue while using the service, use the Provide Feedback option to describe the issue and the steps to reproduce it. To expedite the resolution of issues that you find in the service, Oracle recommends that you add multiple screenshots to your feedback submissions. Adding a succession of screenshots that show your progress through a task enables you to create a storyboard that shows Oracle how to recreate your issue.

Each time a user submits feedback to Oracle, a feedback notification, a subset of the information that a user submits using the Provide Feedback function, is sent to Service Administrators and to the user who submits the feedback. These notifications enable Service Administrators to review submitted issues and suggest corrective actions. Feedback notification is enabled by default. Each Service Administrator can turn off the notification by clicking the Unsubscribe link embedded in the email. See [Disabling Feedback Notification](#). Regardless of the subscription status, a notification is always sent to the user who submits the feedback. Before providing feedback, ensure that you are at the stage in the process when the problem was observed.


 **Note:**

Using this option to provide feedback sends your submission to Oracle but does not create a service request. If a Service Administrator cannot resolve the issue, then you can create a service request using the information that you submit.

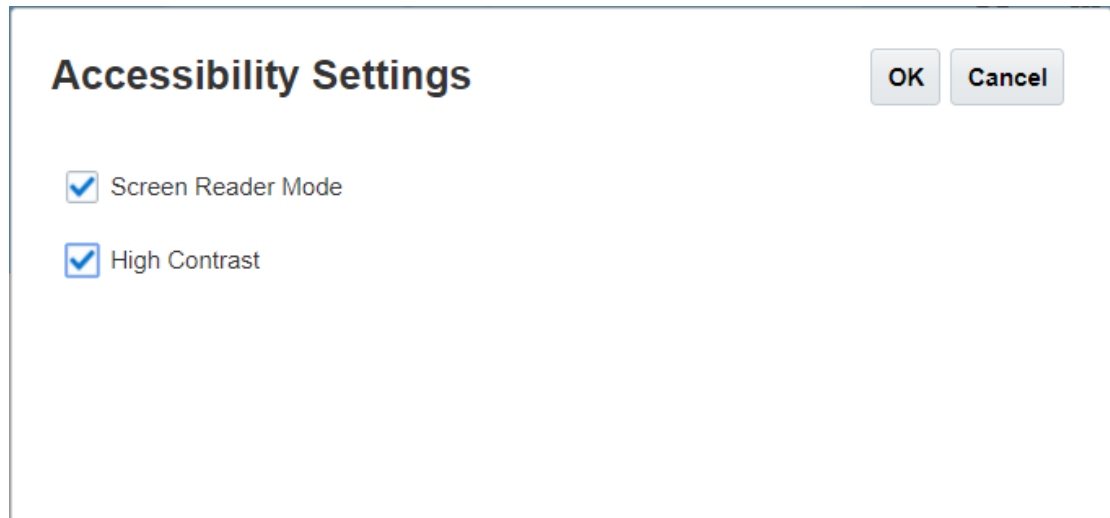
1. From any page, select **Send Diagnostics To Oracle**.
2. In **Feedback**, describe the issue that you encountered.
3. **Optional:** Select an option to highlight or darken areas of the screen in the next two steps:
  - a. Select **Highlight**, and then click and drag on the screen to highlight portions of the screen, for example, to highlight errors or issues.
  - b. Select **Darken**, and then click and drag on the screen to hide portions of the screen. Use this option to hide sensitive data in the screenshot.
4. Click  to capture the screenshot.
5. Navigate to another page and select  to capture another screen. The Captured Image is incremented for each screenshot.
6. Repeat steps above for additional captures.
7. When you have added all the screen captures, click **Submit**.
8. Review the browser, environment, and plug-in information. Click the right-pointing arrow to review screenshots.
9. Click **Submit**.
10. Click **Close**.

## Accessibility Settings

Use this for accessibility.

To access accessibility settings, click the Accessibility  icon at the upper right of the Home page.





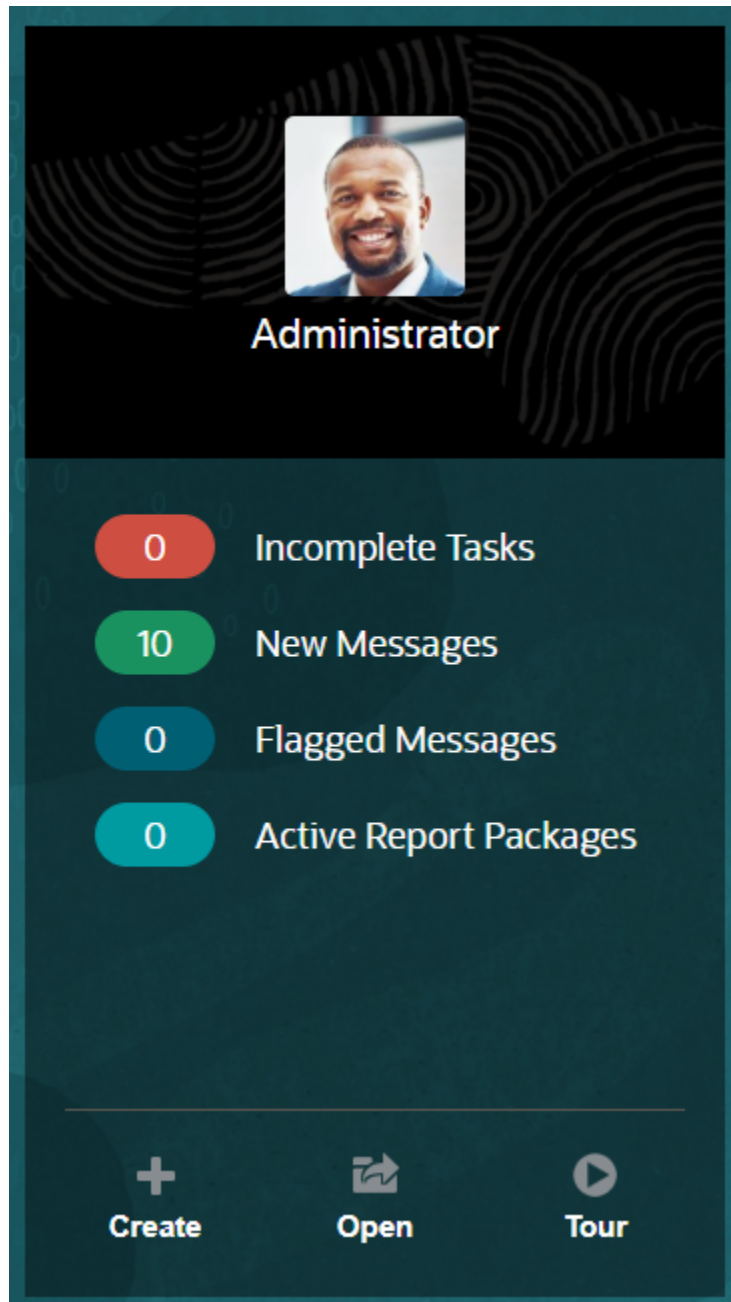
- **Screen Reader Mode** – Enables a screen reader to read the text on the screen.
- **High contrast** – Sharpens screen contrast.

**Note:** To increase the font size, use your browser settings.

## Welcome Panel

Quickly displays your status, create, open, or take a tour.

The Welcome Panel gives you access to key areas while you use Narrative Reporting and helps you see your pending workload at a glance. Click the arrow to access each option.



**Upload Photo**

Select the picture to upload a photo of yourself.

**Incomplete Tasks**

Shows the number of assigned tasks that have not been completed yet.

**New Messages**

Displays the number of unread messages.

**Flagged Messages**

Displays the number of flagged messages.

## Active Report Package

The number of your current report packages.

## Create

Depending on your permissions, lets you create a report, book, report package or system audit file.

## Open

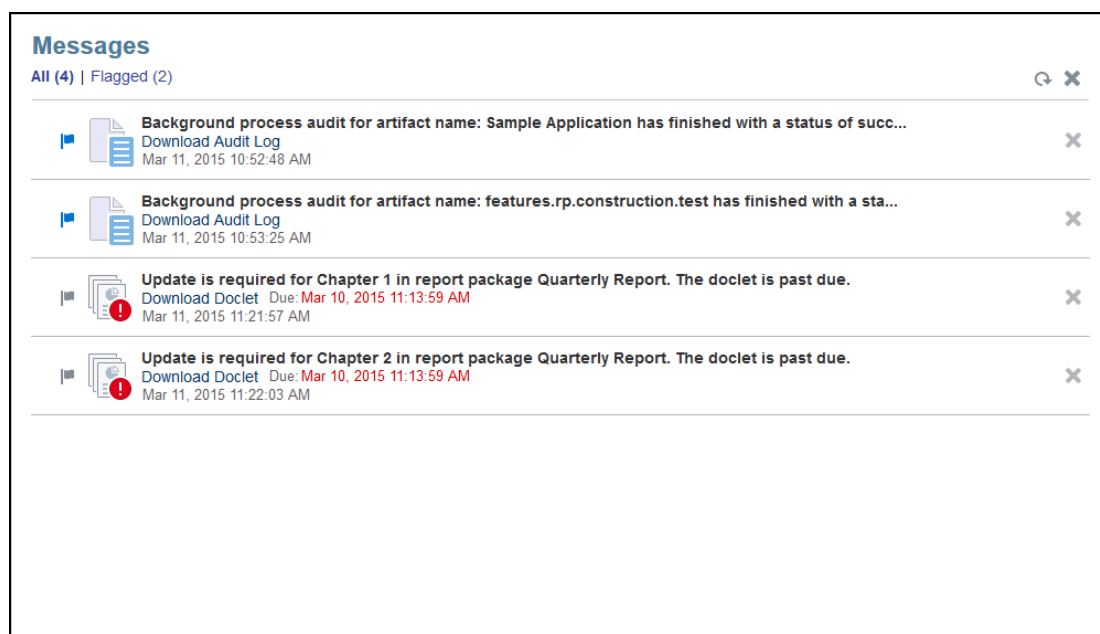
Opens the recently used list.

## Tour

Takes you to the Oracle Cloud Help Center to access videos and documentation.

## Messages

When you select Messages from either the Welcome Panel or the Messages icon, you will see items such as confirmation of an action or a notification that you're assigned a task. Click the blue text to perform the action that you need to take.

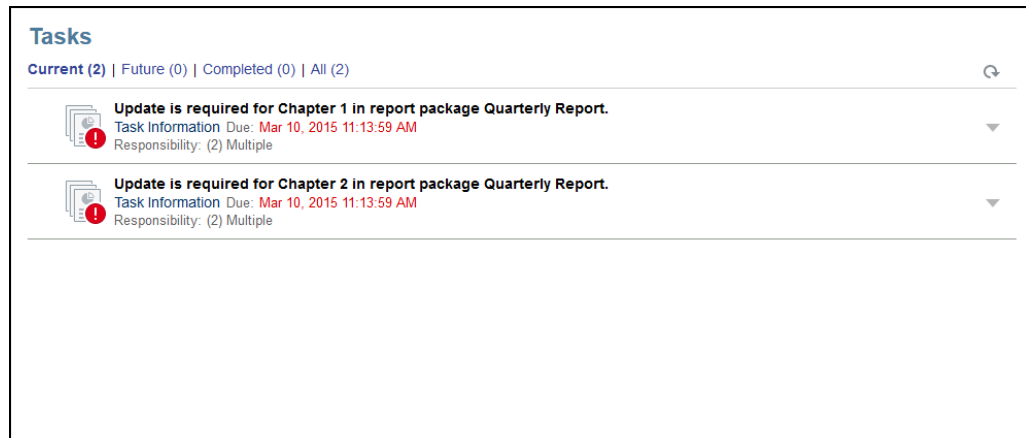


The screenshot shows a 'Messages' panel with the following content:

- Messages** (header)
- All (4) | Flagged (2)** (filter)
- Message 1:** Background process audit for artifact name: Sample Application has finished with a status of succ...  
Download Audit Log  
Mar 11, 2015 10:52:48 AM
- Message 2:** Background process audit for artifact name: features.rp.construction.test has finished with a sta...  
Download Audit Log  
Mar 11, 2015 10:53:25 AM
- Message 3:** Update is required for Chapter 1 in report package Quarterly Report. The doclet is past due.  
Download Doclet Due: Mar 10, 2015 11:13:59 AM  
Mar 11, 2015 11:21:57 AM
- Message 4:** Update is required for Chapter 2 in report package Quarterly Report. The doclet is past due.  
Download Doclet Due: Mar 10, 2015 11:13:59 AM  
Mar 11, 2015 11:22:03 AM

## Tasks







You can access your incomplete tasks from the Welcome Panel or all of your tasks (current, future, completed) from the Tasks icon. Click either the icon or the blue text link to access additional task details.




## Conventions Used

These are the most popular icons used in Narrative Reporting.

Conventions used in Narrative Reporting:

-  An asterisk indicates a required entry.
-  A plus sign indicates that you can create or add comment.
-  An X indicates that you can remove or delete content.
-  A curled arrow indicates that you can refresh your screen.
-  A triangle caret indicates a drop-down menu with possible actions.
-  A gear indicates actions or an actions menu.

In addition, a person  indicates that you can get help from either the Oracle Cloud Help Center, Oracle Support site, or Provide Feedback. You can also access Oracle Customer Cloud Connect, a community gathering place for members to interact and collaborate on common goals and objectives, from this icon.

All Narrative Reporting icons have tooltips. Hover your cursor over tooltips for information about icons.

## Roles and Permission-Based Access

Based on your roles provisioned, you have access to certain roles.

Secured access to Narrative Reporting is established by the roles that you have been provisioned within Oracle Cloud User Management Console, and access permissions that have been granted to you from within the service. Because the functionality is restricted to only the users who can perform a task, security is enforced. For example, look at the Home Page. A service administrator has access to all the functionality available within the service, but a reviewer only sees some of these tasks. If your roles and access grants are more restrictive, then you will only see a subset of the functionality.




## Which Tasks Should I Do First?


Explains, to an administrator, what tasks to do.

When starting to use Narrative Reporting, perform these tasks after reading this topic.

### All Users

- Learn about Narrative Reporting in [Learn about Narrative Reporting](#).
- See which tasks you should start with in [Which Tasks Should I Do First?](#)
- Find out about browser requirements as well as other requirements in [Prerequisites](#).
- Find out how to access an instance of Narrative Reporting in [Accessing EPM Cloud](#).
- Upload your photo, check the language and time zone, and set any other preferences listed in [Managing User Preferences](#).
- Get familiar with Narrative Reporting by watching videos:  [Overview: Report Package Part 1 in Oracle Narrative Reporting](#) and [Overview: Report Package Part 2 in Oracle Narrative Reporting](#), [Learn about Smart View](#), and reading this topic, [Using the Library](#).

### Administrators

- Learn about Narrative Reporting in [Learn about Narrative Reporting](#).
- See which tasks you should start with in [Which Tasks Should I Do First?](#)
- Get familiar with these additional features by watching these videos:  [Learn about working with applications, models, and dimensions](#) and [Learn about Security](#).

- For information to help you configure Oracle's Sender Protection Framework (SPF) see [Configuring SPF Record for Oracle Cloud Email Verification](#)
- Set the daily maintenance time in Settings. See [Setting Service Maintenance Time](#).
- Create users and assign roles. See [Creating Users and Assigning Roles](#).
- Review [Known Issues](#) on [My Oracle Support](#) where you can see if any known issues or helpful work arounds exist for this release.
- Review [Readiness Information](#) for Narrative Reporting, where you can review information about what's new in each release.
- Join [Customer Connect](#), where you can join discussions, ask questions, and share information.

## How Do I Get Additional Help

This explains how to obtain user assistance.

User assistance in Narrative Reporting is tailored to get you the right information based on your roles and permissions. See the [Oracle Cloud Help Center](#) for available information. Also watch overview videos and tutorial videos to increase your understanding.



### Note:

Depending on your browser, the screenshots and procedures shown may look slightly different from what you see on screen. For example, a browse button may be presented as "choose file" in Chrome.

## Configuring SPF Record for Oracle Cloud Email Verification

Oracle publishes Sender Protection Framework (SPF) policy that identifies the Oracle server IP addresses and subnets that are permitted to send cloud services emails.

You can use this information to assess the validity of the messages to determine whether or not to accept them. Additionally, you can use the information as a part of the message protection services.

Add the following in your SPF record to take advantage of this protection:

```
"v=spf1 include:spf_c.oracle.com -all"
```

## Using Translations

This tells you the languages translated for Narrative Reporting.

The following items are translated for Narrative Reporting:

- The User Interface (UI) is translated into Arabic, Danish, German, Spanish, Finnish, French, Italian, Japanese, Korean, Dutch, Norwegian, Polish, Portuguese (Brazilian), Russian, Swedish, Turkish, Simplified Chinese, Traditional Chinese, and Canadian French.

- Disclosure Management is translated into Danish, German, Spanish, Finnish, French, Italian, Japanese, Korean, Dutch, Norwegian, Polish, Portuguese (Brazilian), Russian, Swedish, Turkish, Simplified Chinese, Traditional Chinese, and Canadian French.
- The overview video closed captions are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese.

 **Note:**

Tutorial video closed captions are not translated.

The online Help and guides are translated into French, German, Italian, Spanish, Brazilian Portuguese, Japanese, Korean, Traditional Chinese, and Simplified Chinese. Additionally, the Oracle Smart View for Office User's online Help and guide is translated to Dutch. See the Oracle Cloud Help Center Translated Books tab at [Oracle Cloud Help Center](#).

 **Note:**

The Sample Application and the contents are in English only.

The translated documentation covers all features up to August 28, 2017, except for Working with Smart View for Enterprise Performance Management Cloud which covers features up to August 7, 2017.

# 3

## Overview of Report Packages

### Related Topics

- [Learning About Report Packages](#)  
Report packages provide a secure, collaborative, and process driven approach for defining, authoring, reviewing and publishing financial, management and regulatory reports.
- [Why Use a Report Package?](#)  
*Report packages* enables you manage the lifecycle of your deliverable, such as: Gathering information, reviewing it for accuracy, and Presenting it are key to business.
- [What is a Report Package?](#)  
With report packages, you can structure the content of your report, assign responsibilities to content creators and reviewers, and manage their collaboration and workflow to produce a unified document.
- [Report Package Components](#)  
A report package is made up of several components:

## Learning About Report Packages

Report packages provide a secure, collaborative, and process driven approach for defining, authoring, reviewing and publishing financial, management and regulatory reports.

But what is a report package? Why would you use one? And how do they work? The following topics provide answers to these questions:

- [Why Use a Report Package?](#)
- [What is a Report Package?](#)
- [Report Package Components](#)
  - [Author Phase](#)
  - [Review Phase](#)
  - [Sign Off Phase](#)

See these videos - :

- [Overview: Report Package Part 1 in Narrative Reporting](#)
- [Overview: Report Package Part 2 in Narrative Reporting.](#)

## Why Use a Report Package?

*Report packages* enables you manage the lifecycle of your deliverable, such as: Gathering information, reviewing it for accuracy, and Presenting it are key to business.

Financial reporting is a critical function in most companies. Reports can be internal, for board packages, management updates, or quarterly updates. Or they can be external, such as



statutory, regulatory, filing, or annual reports. For any report, gathering information, reviewing it for accuracy, and presenting it are key to businesses.

Creating reports is easy with one author and no review, but having multiple authors working on a report can be more complicated. Do all of the authors have the current version? How do you merge changes from multiple authors into a single document? As you add content creators, keeping everyone organized becomes more challenging.

The situation becomes even more difficult with several authors, multiple reviewers—each of whom might be responsible for different sections, and multiple signers who provides final sign off on the whole report. How do you keep all of your authors, approvers, reviewers, and signers organized? How do you handle versioning and manage workflow? Coordinating stakeholders by email can be daunting.

A better way to organize and produce a collaborative report is by using a *report package*.

Other use cases for a Report Package include producing disclosure management-focused deliverables (such as a 10K or 10Q) that can then be subsequently handed off to your preferred XBRL tagging vendor or publisher for finalization.

## What is a Report Package?

With report packages, you can structure the content of your report, assign responsibilities to content creators and reviewers, and manage their collaboration and workflow to produce a unified document.

Use report packages to create, for example, internal Reports that may require some level of collaboration to develop, but may not undergo a highly intensive review. Or, you can create external reports that require a high level of scrutiny, multiple reviews, and significant process management.

With report packages, you can:

**assign content**  
to multiple authors



**gather comments**  
from reviewers



**provide an electronic sign off**  
on the completed report



**manage the report life cycle**



**combine data points**  
with textual narrative



**secure and control access**  
to the report content



Report packages help you manage the lifecycle of your deliverables. With them, you can:

- Assign content to multiple authors, who each contribute individual pieces of the report
- Gather comments from multiple reviewers
- Provide an electronic sign off on the completed report
- Manage the report lifecycle by providing notifications to users, managing the workflow, and coordinating the processes
- Combine data points with textual narrative
- Secure and control access to the report content, enabling users to see only the content that they are permitted to see at the time that they are permitted to see it

Next, let's look at some key components of a report package.



- Complete this Learning Path for a hands-on [Narrative Reporting Basics: Report Packages and Doclets](#).

## Report Package Components

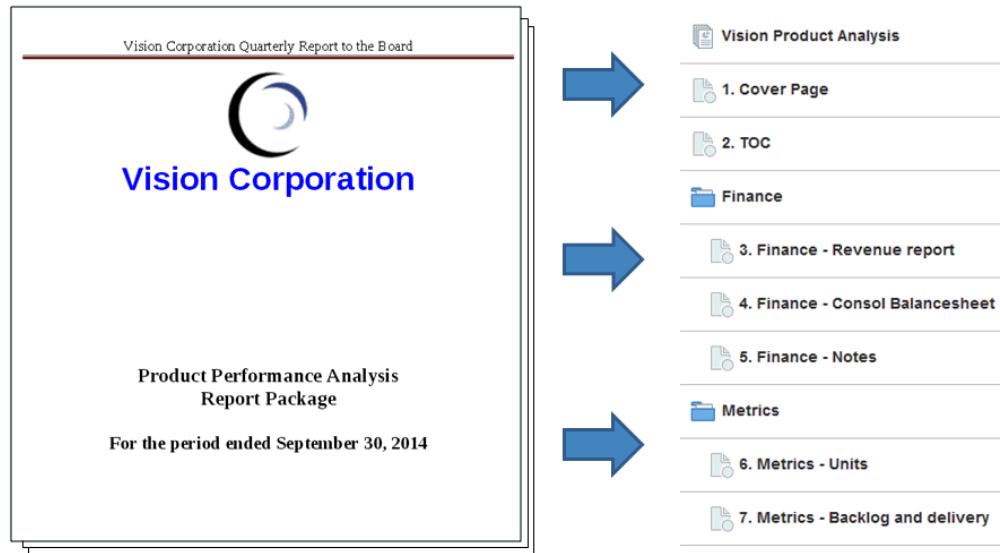
A report package is made up of several components:

- **Doclets** are individual pieces of a report that can be assigned out to authors to provide the content.
- **Optional: Supplemental doclets** are managed exactly the same way as a doclet, with respect to workflow and content management, except that the content of the files is not merged into the report package.
- **Reference Doclets** are managed exactly the same way as a doclet, with respect to workflow and content management, except that the content of the files is not merged into the report package.
- **Sections** help group and organize doclets in a report package.
- **Development phases** enable you to select which of three phases you require for your development: an author, review, and sign off phase.

### Doclets

A core feature of report packages is the ability to break down a report into subcomponents called *doclets*. What makes up a doclet varies, depending on the type of report that you are creating. For example, a sales report might have separate doclets for each geographical region, and a financial disclosure might have doclets for each of the various financial statements, tax statements, and notes.

Alternatively, if one person is responsible for all of the income statement information in a report, for example, those income statement documents can be all classified as a single doclet. How you define a doclet is completely up to you. See "Identifying Doclets" in Report Package Design Considerations.



After you identify the doclets in a report, you assign them to authors, who provide content. For example, in a report that breaks down revenue by categories, you can have doclets for services, hardware, and software licenses. Then, you could assign each doclet to the management team in charge of that category.

### Supplemental Doclets

Supplemental documents such as procedures, instructions, reference material, and so on, can be uploaded into a report package as a supplemental doclet. Supplemental documents can be any type of document file (for example, PDF, Excel, Word, and so on). As the content for supplemental doclets is not included within the merged report, these doclets are excluded from the review and sign off processes. The supplemental doclet contents cannot be viewed online, but users can download and use native programs to open the supplemental doclet in the same way that you can work with third party artifacts in the library.

See this video also  [Managing Supplemental Doclets in Narrative Reporting](#).

### Reference Doclets

A [Reference doclet](#) can be used as a container to store contents such as named ranges from an Excel file or charts and graphs created from Reports, see [Adding a Report to a Reference Doclet and consumed by one or more regular doclets \(non-supplemental\)](#).

The file content for Reference doclets is not *directly* included in any report package outputs, such as preview, publish, review instances or signoff instances. However, embedded content within a consuming doclet is displayed as part of the report package outputs - even though the actual reference doclet is not directly merged in the outputs. Reference doclets can participate in the author phase, but not in the review or signoff phases.

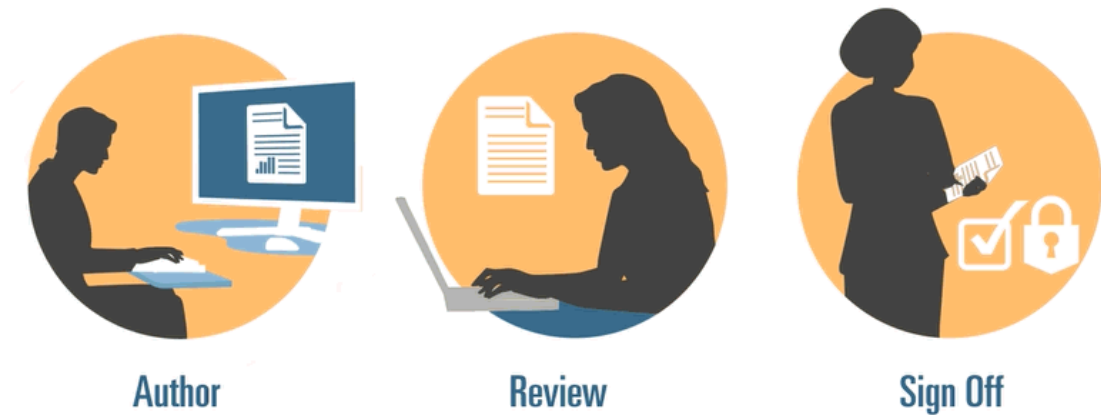
### Sections

Sections enable you to group doclets for organization, or to keep doclets together that have a common format or are intended for a common viewership. For example, you can group all financial statements in a financial disclosure report into one section.

Doing so provides a filtered view of only those doclets to the reviewers assigned to that section.

### Development Phases

Report package development occurs in three phases:



- Author phase—Compile the various report content and supporting details together into a cohesive report package.
- Review phase—Gather commentary on multiple draft versions and revise the report content accordingly.
- Sign Off phase—Gather electronic signatures from key constituents and secure report contents to prevent modifications.

You decide which development phases your report requires. If the report content is going to be provided primarily by one or two people, then you may not need an author phase. If your report is being developed for a small group of internal stakeholders and not a public audience, then you may not need a review phase. You can tailor the development phases to the type of report that you need. See "Determining Development Phases" in Report Package Design Considerations.

Lets's look at these development phases in a little more detail.

## Author Phase



In the author phase, authors and approvers work with doclets to add content to a report package. Authors provide content, and approvers review and edit the content.

Benefits of the author phase include:

### **Content Management**

Content management allows users to check doclets in and out of a central repository, ensuring that only one user at a time is updating a doclet. It also provides for version control. When a user checks in an updated version of a doclet, the previous version is automatically stored. Previous versions can be easily accessed for comparison. Users can store versions that they're still working on and can check versions in when they're ready for others to access them.

#### **Note:**

Doclet versioning has been optimized to minimize the impact of multiple automated check-ins. When multiple automated check-ins are performed on the doclet due to variable or embedded content changes, the system will update the doclet contents but will not generate a new version.

### **Flexible Workflow**

Workflow enables doclet content to be developed collaboratively. An author can update the doclet, and an approver can review and edit the content. You can set up multiple levels of approvals, and the number of approval levels can vary per doclet. For example, a doclet containing an introductory statement may not require an approval, and a doclet containing revenue information may require multiple approval levels.

Using workflow, users scheduled for later in the review process can take control of a doclet sooner. For example, if a doclet is assigned to an author, an approver or the owner of the report package can take action on the doclet without waiting for the doclet author. This flexibility eliminates bottlenecks and speeds up content development.

## Process Reporting

Process reporting enables you to view the author phase status on two levels:

- **Summary level**—Provides statuses for the entire author phase, such as the overall completion percentage of the author phase, a summary of the status of all the doclets, and the due date and time remaining for the author phase.
- **Doclet level**—Provides the status for each individual doclet, the current responsibility, and whether the doclet is checked in or out. You can also tell at a glance the workflow level of the doclets, including the user assignments and the due dates by user.

## Review Phase



In the review phase, reviewers provide feedback, ask questions, and recommend changes.

Benefits of the review phase include:

### Multiple Review Cycles

In the review phase, multiple reviewers can review different versions of the report. For example, managers could review the first draft of the report, executives can review the second draft, and top management can review the third.

You can vary the review assignments by area. A user can be assigned to review the entire report, a section of the report, or a doclet.

### Threaded Commentary

Reviewers provide feedback by commenting on different areas of the report. These comments are threaded so other reviewers can participate in the discussion. Reviewers can provide attachments or links to their comments to provide supporting details. Reviewers can close comments after the outstanding issue is addressed.



**Note:**

Comments persist across review cycles in context, so that reviewers can see how comments are addressed in subsequent drafts.

### Multiple Platforms

You can comment on reports in these ways:

- Desktop or mobile web browser
- Microsoft Office, through Oracle Smart View for Office

### Process Reporting

Process reporting enables the report package owner to view the review phase status on two levels:

- **Summary level**—Provides statuses for the entire review phase, such as the overall completion percentage of the review phase, the number and percentage of reviews completed, the number of open comments, and the due date and time remaining for the review phase.
- **Doclet level**—Provides review status for each doclet, such as the reviews completed per doclet and the number of open and closed comments raised for each doclet.

## Sign Off Phase



The Sign Off phase enables you to finalize your report content and get sign off from your key stakeholders.

Benefits of the sign off phase include:

### **Locked Content**

In the sign off phase, you lock your report to prevent changes. The report signers review the final report and either sign off or reject the report content. If the report is rejected, the report package owner can unlock and correct the report content. If the report is signed off, the process is complete, and the report is ready for publication.

### **Multiple Platforms**

You can provide sign off in these ways:

- Desktop or mobile web browser
- Microsoft Office, through Oracle Smart View for Office

### **Process Reporting**

Report package owners can view a summary of the sign off phase. The summary can include completion percentage, number of sign offs and rejections, due date, and days remaining, as well as who signed off and any sign off notes.



# 4

## 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 Enterprise Performance Management Cloud sources, Essbase Cloud, and ERP Cloud Financials. Reports is also embedded in the EPM Cloud Platform business processes and applications: Enterprise Profitability and Cost Management, Planning and Planning Modules, Financial Consolidation and Close, Tax Reporting, and FreeForm (EPM Cloud 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 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 output for each member.

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. EPM Cloud 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 EPM Automate Commands (via Third party scheduler).
- Migrate Financial Reporting (FR reports) to Reports.

In EPM Cloud deployments:

- Reports does not include Notes.
- Reports are integrated with Narrative Reporting via **Remote Libraries**, however Reports in EPM Cloud 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 EPM Cloud instances. Data Sources are automatically created based on the EPM Cloud application cubes that are on the instance.
- Reports, security, and POV selections are managed by the EPM Cloud platform. Reports are stored in the EPM Cloud repository.
- Reports, books, and bursting definitions can be moved between environments using the EPM Cloud Lifecycle Management.
- Fonts are uploaded and managed in Application Setting in Reporting Settings.
- Scheduling for bursting definitions is done via the EPM Cloud platform Job Scheduler.

Watch this overview video to understand the highlights of Reports.



-- [Reports in EPM Cloud Narrative Reporting.](#)



-- [Reporting in the new EPM Cloud Platform..](#)

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



-- [Creating Reports in Narrative Reporting Cloud.](#)



-- [Creating Reports in EPM Cloud.](#)

# 5

## Overview of Smart View

### Related Topics

- [Learning About Smart View](#)

You can learn how to work with Oracle Smart View for Office and then try to interact with Narrative Reporting data and report packages.

## Learning About Smart View

You can learn how to work with Oracle Smart View for Office and then try to interact with Narrative Reporting data and report packages.

### What is Smart View?

Smart View uses a Microsoft Office interface designed for Oracle Enterprise Performance Management System, Oracle Business Intelligence, and Oracle Fusion Financials products. When working with report packages in Smart View, you can:

- Author doclets using familiar Microsoft Office tools to access and work with data without having to download and work on them locally.
- Complete review and sign off tasks for report packages.
- Perform complex analyses on your data.

### Working with Smart View in Excel



In Excel, Smart View allows you to perform ad hoc queries on Narrative Reporting data and other EPM and BI data sources. You can easily embed data points from ad hoc queries into your report narratives in Narrative Reporting. The data points in your narratives are refreshable, meaning the data will always be the latest.

### Working with Smart View Word or PowerPoint



When you work with doclets in Word or PowerPoint, you can use Smart View to include data from Narrative Reporting data sources and other EPM System data sources, including on-premises and cloud data sources. For example, you can incorporate data from a profit and loss statement in Oracle Essbase Studio and an income statement from a Planning source. The data points for the areas that you copy remain in Word or PowerPoint, and you can refresh the doclet to see the latest data values.

For more information about working with Smart View in Narrative Reporting, see these topics:

- [Setting Up Narrative Reporting in Smart View](#)
- [Authoring Doclets in Smart View](#)
- [Using Narrative Reporting Home](#)
- [Approving Doclets in Smart View](#)
- [Performing Reviews in Smart View](#)
- [Performing Sign Offs in Smart View](#)
- [Working with Distributions](#)
- [Example: Working with Narrative Reporting Data in Smart View](#)
- [Create New Report Package Structures in Smart View](#)
- [Assign Authors When Adding Doclets to Report Package Structures](#)
- [Validate Fonts in Excel Reference Doclets](#)

# 6

## Overview of the Library


### Related Topics

- [Learning About the Library](#)  
The library is the Narrative Reporting artifact repository.

## Learning About the Library

The library is the Narrative Reporting artifact repository.

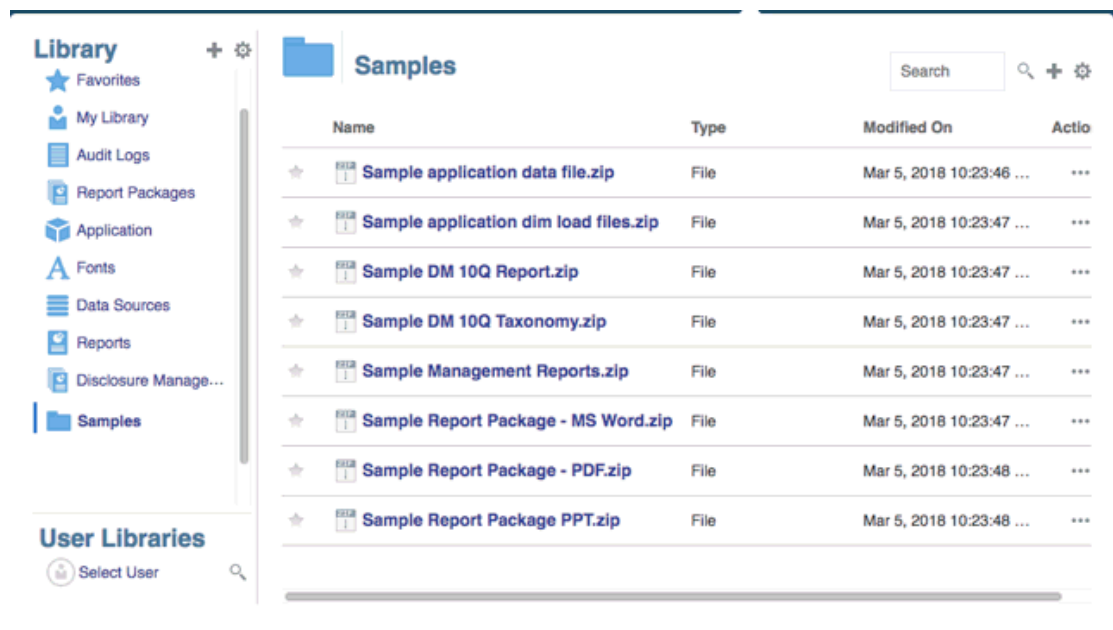
Use it to organize and manage content in a familiar, intuitive interface, which borrows from well-known applications. Its interface and functionality borrows from existing desktop and web-based file and document management systems. For example, use library folders to organize and store artifacts such as report packages, applications, audit log files, graphic files, Microsoft documents, and so on. You can also create shortcuts to artifacts, and use system-generated personal folders such as Recent, Favorites, and My Library to organize content. You can also create your own folders. After creating the folders, you can grant other

users access to them. Learn more about the library from this video  [Learning About the Narrative Reporting Library](#).

Users with the library administrator role can:

- Create folders and see all child folders and folder contents however, they cannot open and view the contents of folders unless they have the appropriate permissions.
- Create shortcuts in any folder where they have write permissions.

**Figure 6-1 Example of the Library**



A user with the service administrator role has the complete ability to perform any of the actions or tasks to any artifact or folder in the library. The service administrator can see each users My Library folder and has unrestricted access to the service. However, they cannot see other users Favorites or Recent folders since these only contain shortcuts.

The library provides these benefits:

### Migrating

You can migrate folders, Report Packages, Reports, Books, Bursting Definitions, Data sources, Notes, Fonts, Third-party files, and Applications (where applicable) between environments and within them. You can migrate artifacts using the export, download, and import functionality in the library or by using the EPM Automate Commands. For migrating Notes artifacts, you use the Notes Manager. See [Migrating Notes Artifacts from One Environment to Another](#), [Notes ManagerMigrate Artifacts](#), and [EPM Automate Commands](#).

### Auditing

An administrator of an artifact can run audit reports for their artifact. The service administrator can run additional audit reports for the entire system. Additional information on audits:

- Actions in the system are captured in a running system audit.
- You can extract audit entries for folders or artifacts to which you have administrator permissions.
- An extract file is created from the running system audit that falls within the time frame that you entered in Create Audit File and is saved in the Audit Logs folder in the library.

For more information on audits, see [Using Audits](#).

### Built-In Intelligence

The library is role-based, and a user is either shown content that they have been given explicit access to, or content that has been made available to them from the report package workflow. For example, a doclet author cannot see a report package in the library until the author phase has started. See [Creating Artifacts in the Library](#).

### Customizing and Inspecting

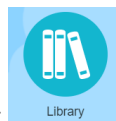
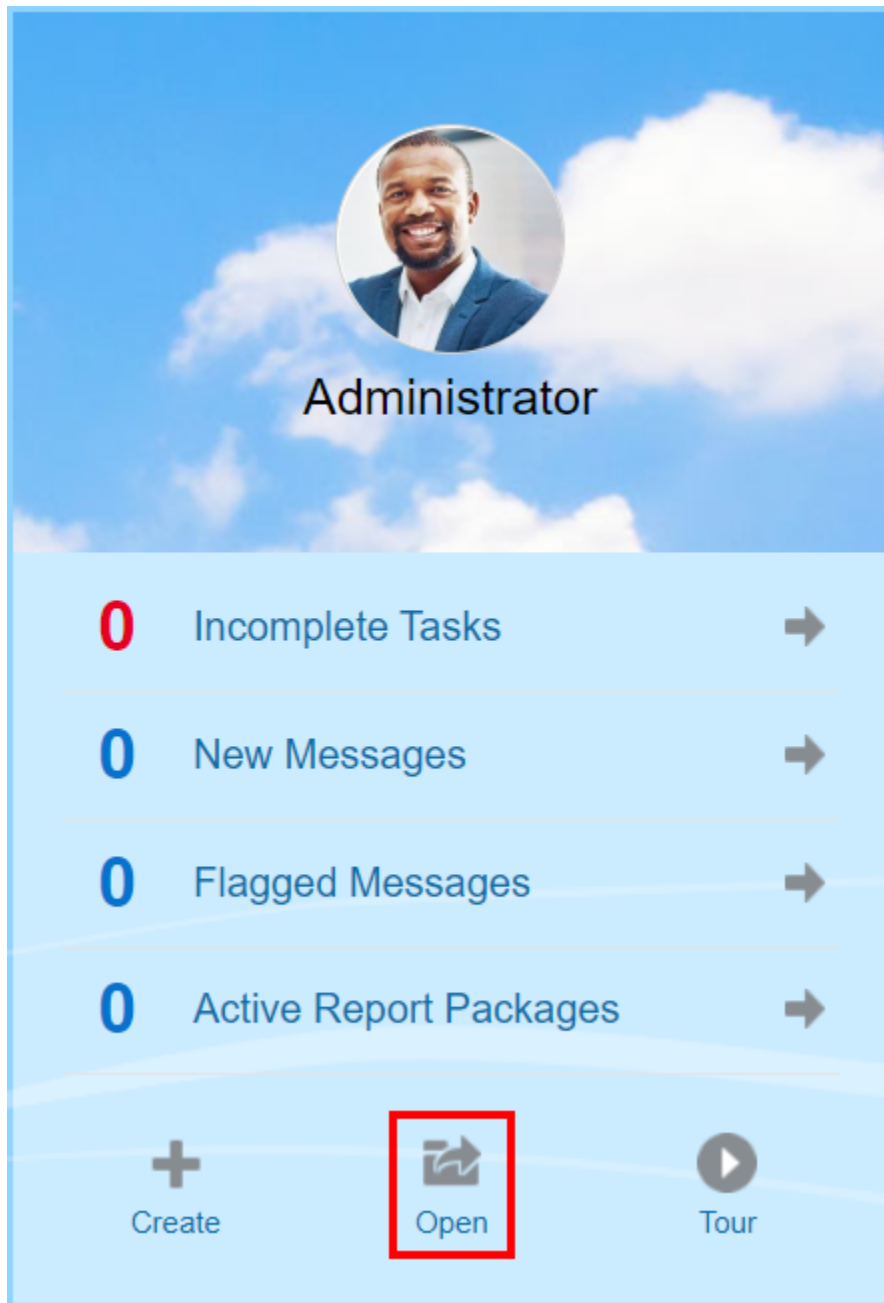
A user can customize their view of the library by [Setting Default Views for Content Pane Folders and Artifacts](#). For example, set a default view preference for a folder or all folders and sort the contents of a folder. You can inspect or review a folder's properties. For example, as a service administrator, from the properties tab of the Inspect dialog you can edit the artifact name, view the artifact type, the location of the artifact in the library or path, the description, and so on. You can assign access for an artifact so only a limited audience can see or open it. You can also review the history and actions taken on an artifact. See [Inspecting Folders and Artifacts](#).

## How to use the Library

There are different ways to open the library.

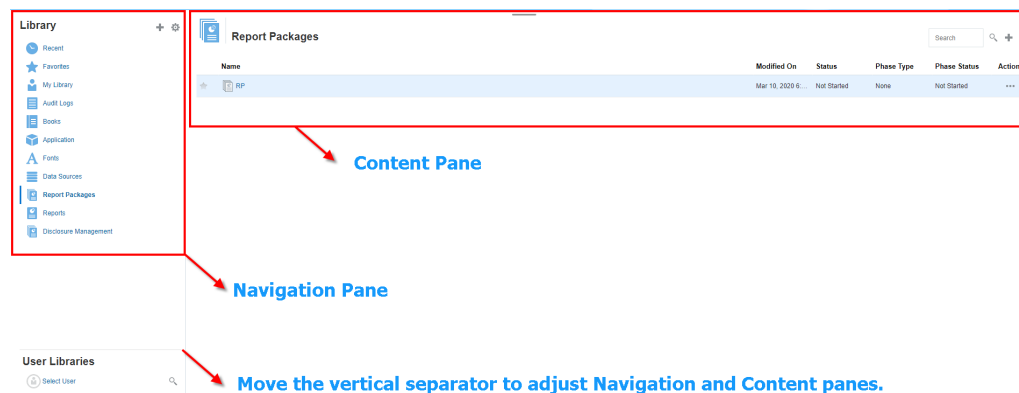
Select one of the following to open the library:

- From the Welcome Panel on the Home page, select **Open**:



- On the Home page, select

The library opens to the Recent folder by default. Example of the library UI:

**Figure 6-2 Sample Library**

## Learning About the Navigation and Content Panes

The library's navigation pane contains a list of default, system-generated, and personal folders.

The content pane contains the contents of the folders in the navigation pane. Click and drag the vertical separator to adjust the windows.

The navigation pane's user-created folders and system-generated personal folders help you stay organized.

- User-created folders; for example `John Smith Report Packages`.
- System-generated personal folders; Recent, Favorites, and My Library:

### Note:

The menus and actions available for the following are role based.

### Recent

Contains shortcuts to recently accessed content. The number of recent shortcuts retained is set in preferences, see the Library tab in [Managing User Preferences](#). You can inspect shortcuts, which are read only, to view artifact properties. Refresh to update the contents. See [Inspect](#). See the [Using the Action Menu](#) for more information on how to access the action menus to select these options. Additional rules for this folder are:

- Only the given user can see the shortcuts in this folder.
- The user cannot copy, move, or rename the shortcuts in this folder.
- The user can delete shortcuts in this folder.
- If the name of the artifact to which the Recent shortcut points to is changed, the name of the shortcut is also changed.
- If the source artifact is deleted, the recent shortcut is deleted.



- The ability of the given user to access the artifact that the Recent shortcut points to is governed by the user's permissions on the base artifact, not the shortcut.
- The artifact properties shown in the Inspect dialog for a recent artifact are from the source artifact.

### **Favorites**

Contains shortcuts to artifacts marked as favorites. Includes the same options available as the Recent folder. Additional rules for this folder are:

- Only the given user can see the shortcuts in this folder.
- The user can rename and delete shortcuts in this folder, and add or change a description.
- The user can move a sub-folder or shortcut contained in this folder only within the Favorites folder or its children.
- The user cannot copy or move artifacts to or from outside the Favorites folder, this includes the copy and move of shortcuts.
- The name of the favorite shortcut does not need to match the source artifact, and if the source artifacts name changes, the name of the shortcut contained in the Favorites does not change.
- If the source artifact is deleted, the favorite artifact is deleted.
- The artifact properties shown in the Inspect dialog for a Favorites artifact (shortcut or folder) are from the favorites artifact.

### **My Library**

Personal artifacts such as Excel spreadsheets, Word documents, shortcuts, and folders. Includes the same options as the Recent and Favorites folders, plus adds auditing. You cannot give another user access to the content in **My Library**. The audit type artifact file is created in the **Audit Logs** folder and audit is added to the artifact name, for example `Audit - reportpackageRP1`. Additional rules for this folder are:

- Only the service administrator or given user can see the artifacts in this folder.
- You can't create report packages in the **My Library** folder, or move or copy report packages to it. However, you can use shortcuts to report packages in the **My Library** folder.
- Other artifacts can be copied or moved into or out-of this folder.

System-generated folders; Audit Logs, Report Packages, Reports, Books, Bursting Definitions, Application, Fonts and Data Sources:

- **Audit Logs**—Contain system and artifact type audit files created from the system level or artifact.
- **Report Package**—Contain report packages that reside elsewhere in the folders of the library, where they are created.
- **Application**—Contain application that has been created.
- **Fonts**—Contain fonts that can be used for artifacts.
- **Data Sources**—Contain the data source connections created for Reports.
- **Reports**—Contain reports that reside elsewhere in the folders of the library, where they are created.
- **Books**

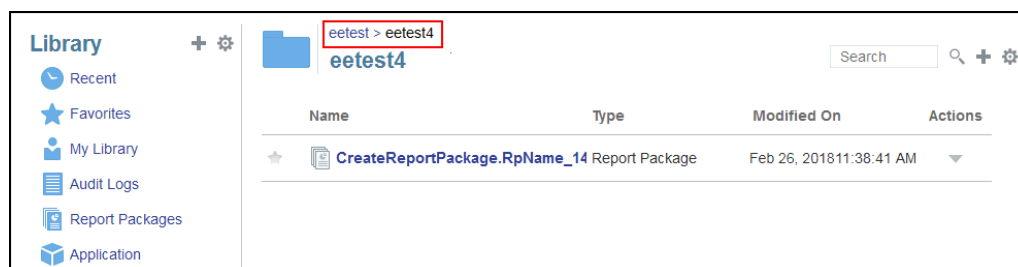
- Contain Books that reside elsewhere in the folders of the library, where they are created.
- Bursting Definitions — Contain Bursting Definitions that reside elsewhere in the folders of the library, where they are created.

## Using Locator Links

Use the locator link at the top of the content area to keep track of folder and artifact locations in the library.



Locator links especially helps when you are deep in a directory. Use the link to click back to previous directory levels. Use the link to click back to a previous level in the library structure.

**Figure 6-3** Locator Links in Content Pane



## Using the Action Menus

Use the Actions menu to act on library artifacts:

- Use the Actions menu  at the top of the navigation pane to take action on the folders in the navigation pane. The actions that you can take vary according to folder to your access permissions. Viewers, for example, cannot run Audits. For example, you can Inspect, Audit, and Refresh system-generated folders. You can take any action on folders that you have created.
- Use the Actions menu  at the top of the content area to act on one or more artifacts in the content area. For example, you can use the Actions menu to edit the properties of a report package or select several folders to move or copy to another location.

## Making a copy of an existing Report Package

You can make a copy of an existing report package and use that as the basis for the next reporting cycle. The copy function makes a complete copy of the report package definition. This includes all of the report package properties, all of the doclets, all of the user assignments, and all of the variables. The doclets contain the last checked in version of the doclet file(s). The copy does not include any of the details related to the development of the source report package. The copy will not include any of the history, prior versions, review instances, or sign off instances from the source report package. All that is required is to update the dates and check the assignments.

To make a copy of the report package:

1. From the folder in the Library where the original report package is located, select the report package you want to copy but do not open it.
2. Select ▼ next to the report package to be copied and then **Copy**.
3. Select an existing folder or create a new one using the + for where you would like to place the copied report package.

 **Note:**

If copying to an existing folder, you must have write-access to the folder where you are placing the copied report package.

4. Select **OK** from dialog displayed.

 **Note:**

This topic also applies to other artifacts in the library you have access to, for example reports.

## Moving a Report Package

You can relocate a report package to another location.

To move a report package:

1. From the folder in the Library where the original report package is located, select the report package you want to move but do not open it.
2. Select ▼ next to the report package to be moved and then **Move**.
3. Select an existing folder or create a new one using the + for where you would like to move the report package.

 **Note:**

When moving to an existing folder, you must have write-access to the folder where the report package is being moved to.





4. Select **OK** from dialog displayed.

 **Note:**

This topic also applies to other artifacts in the library you have access to, for example reports.

## Using the Create Menus

The Create menus allow users with the appropriate roles to create the following:

- Use the Create icon   at the top of the navigation pane to create a folder to store artifacts.
- Use the Create icon   at the top of the content pane to create artifacts. For example, create folders and report packages and upload files and system audit files.

### Note:

When selecting the option to create report packages, the Create Report Package wizard is displayed. See Create Report Packages.

## Working with Connections and Remote Libraries

### Overview

Connections in Narrative Reporting enables you to define access to Reports data sources and **Remote Libraries**.

- Connections streamline the creation and maintenance of Reports data sources and provide a single area of credentials maintenance for multiple cubes in an application.

### Note:

Data source artifacts in the **Library** can still optionally be used to maintain connections to cubes; however this can also be done in **Connections**.

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

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

- Only the Service Administrator role can create and maintain Connections.

Connections support all Reports data sources: EPM Cloud platform (Enterprise Profitability and Cost Management, FreeForm, Planning and Planning Modules, Financial Consolidation and Close, Tax Reporting), Essbase Cloud, Fusion ERP, Profitability and Cost Management (PCM).

- EPM Cloud Platform Connections: You can access cubes for reporting and **Remote Libraries**.
- Essbase, Fusion ERP, Profitability and Cost Management (PCM) Connections: You can access cubes for reporting only.

When creating a Connection, you select the connection type (based on the data source type) and enter the **Server Name** and **Admin Credentials**, as well as other fields, depending on the data source. You can also optionally select cubes to be added as data sources. The data source artifacts in the **Library** use the **Connections** as parent artifact "containers", where you can select a Connection to use and select a cube from that connection.

For EPM Cloud Platform connections, you can optionally enable a Remote Library for users to access reporting content from these connections in Narrative Reporting.

Connection
⚙️
OK
Cancel

\* Name

Type

\* Server Name

Identity Domain

\* Administrator User ID

\* Administrator Password

✔ Connection Successful!

Enable Library

Manage Data Sources ✎ + 🗑️ ↻

Data Source Name	Application Name	Cube Name
Vision	Vision	Plan1 <span style="float: right;">☰</span>

The **Connection** dialog, where you can create and edit **Connections**. For the EPM Cloud Platform connection, you can **Enable Library** to expose a Remote Library to the end-users. Under **Manage Data Sources**, you can create and manage data sources for Reports.

The **Data Source** dialog, where you can alternately create **Connections** to specific cubes. Cube connections can also be defined in the **Connections** dialog.

Name	Type	Modified On	Actions
dashboard.xlsx	File	2021/09/30 1:07 AM	...
Demo Book	Book	2021/09/30 8:44 AM	...
Demo Bursting Definition	Bursting Definition	2021/09/30 6:33 AM	...
Income Statement - Act vs Plan	Report	2021/09/30 6:33 AM	...
Prompt Report	Report	2021/03/04 9:04 AM	...
Revenue by Territory	Report	2021/09/30 6:33 AM	...

A Remote Library to an EPM Cloud Platform instance allows accessing reporting artifacts.

- 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 EPM Cloud 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 Remote Library. You can only open any of the artifacts or copy Reports. Artifacts can only be edited directly in the EPM Cloud instance and not from the **Remote Libraries** in Narrative Reporting.

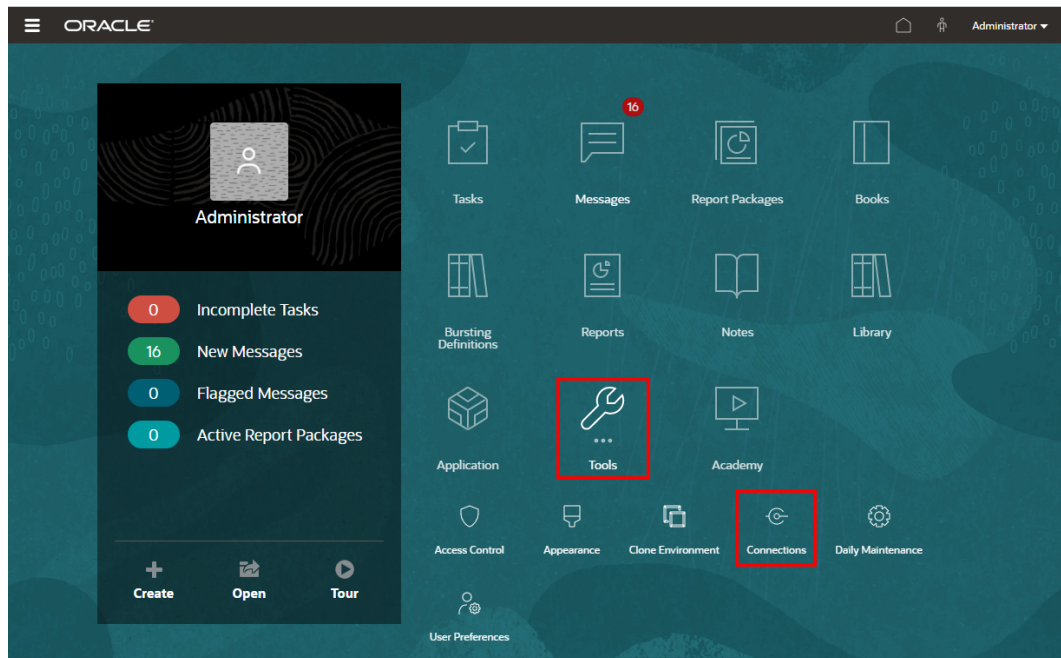



-- [Working with Connections and Remote Libraries.](#)

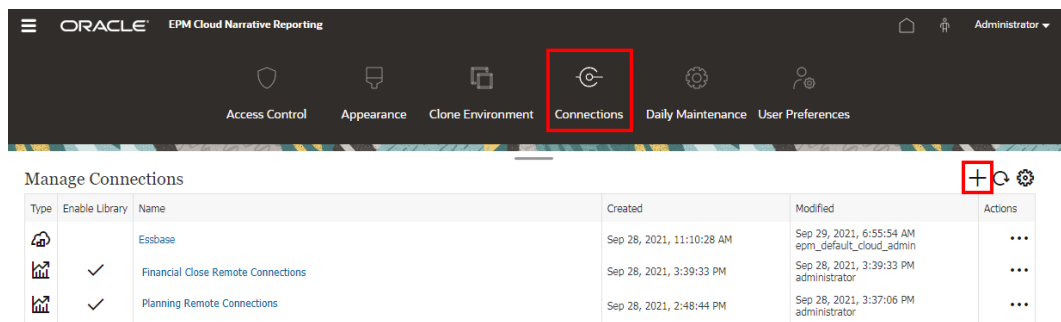
### Creating and Editing Connections

To create a Connection:

1. On the Narrative Reporting Home page, under the **Tools** icon, you can select **Connections**.



2. In the **Manage Connections**, click  to add new connections.



3. In **Name**, enter a descriptive identifier for the connection, such as a combination of the data source and server.
4. In **Type**, select the type of data source:
  - Oracle Enterprise Performance Management Cloud, used for:
    - Enterprise Profitability and Cost Management
    - FreeForm
    - Planning and Planning Modules
    - Financial Consolidation and Close
    - Tax Reporting

- Oracle Essbase Cloud
  - Oracle Profitability and Cost Management Cloud Essbase Provider
  - Oracle Fusion Applications Essbase Provider
  - Oracle Essbase Analytic Provider Services (APS)
5. In **Server Name**, enter the data source server name with no protocol or URL. For example, for EPM Cloud, if data source URL is: `https://<servername>/HyperionPlanning`, the server name is: `<servername>`.
  6. (Oracle Fusion Applications Essbase Provider and Oracle Essbase Analytic Provider Services (APS) only): In **Essbase Server Name**, enter the name of the Essbase server. By default for Fusion Applications, the server name is "Essbase\_FA\_Cluster" and for Essbase APS, the server name is "EssbaseCluster-1".
  7. In **Identity Domain**, enter the identity domain of the data source pod.

 **Note:**

- Not required for Oracle Essbase Cloud, Oracle Fusion Applications Essbase Provider or Oracle Essbase Analytic Provider Services (APS).
- Not required for EPM Cloud deployments on Oracle Cloud Infrastructure (OCI).


8. Enter the administrator User ID and Password. The administrator User ID needs to be a Service/System Administrator role at the data source level, BI Administrator role for Fusion Applications.

 **Note:**

You must log in to Narrative Reporting with the administrator credentials for the data source that you want to create a connection to. For example, if your Planning Modules administrator is **PlanAdmin**, you must log in to Narrative Reporting with the **PlanAdmin** credentials to create a data source connection to the Planning Modules data source. Enter User ID and Password credentials used for native authentication at the source. Single Sign-on with Identity Assertion technologies is not supported.

9. Click **Test Connection**.



**Connection** 

\* Name


Type

\* Server Name





Identity Domain


\* Administrator User ID

\* Administrator Password

 Connection Successful!


Enable Library

Manage Data Sources    





Data Source Name	Application Name	Cube Name
Vision	Vision	Plan1 



(Oracle Essbase Cloud only): Click **Yes** on the dialog box to trust the connection. This setting is stored so that you do not have to answer the question again.


10. For EPM Cloud connections, optionally select **Enable Library** to expose a Remote Library.
11. To select cubes to be added as data sources:

- Under **Manage Data Sources**, click  **Add Data Sources** to add one or more cubes to connect Reports to.
- For each cube, enter a **Data Source Name**, select the **Application** and **Cube** names.

Enable Library

Manage Data Sources    

Data Source Name	Application Name	Cube Name
Plan1	Vision 	Plan1 

After selecting a cube, you can click on  to preview the dimension list.

- In the **Manage Data Sources** toolbar, you can: **Edit** an existing data source, create a **New** data source, **Delete** a data source and **Refresh** the view.
- Click **OK** to add the Connection. The connection will appear in the list under the **Manage Connections**.

To **Edit** a Connection:

In **Manage Connections**, select the **Connection**, and then select **Edit** from the **Actions** menu. When you edit a connection, you can change the **Connection Name** and **Server**, as well as the **Application** and **Cube** names.

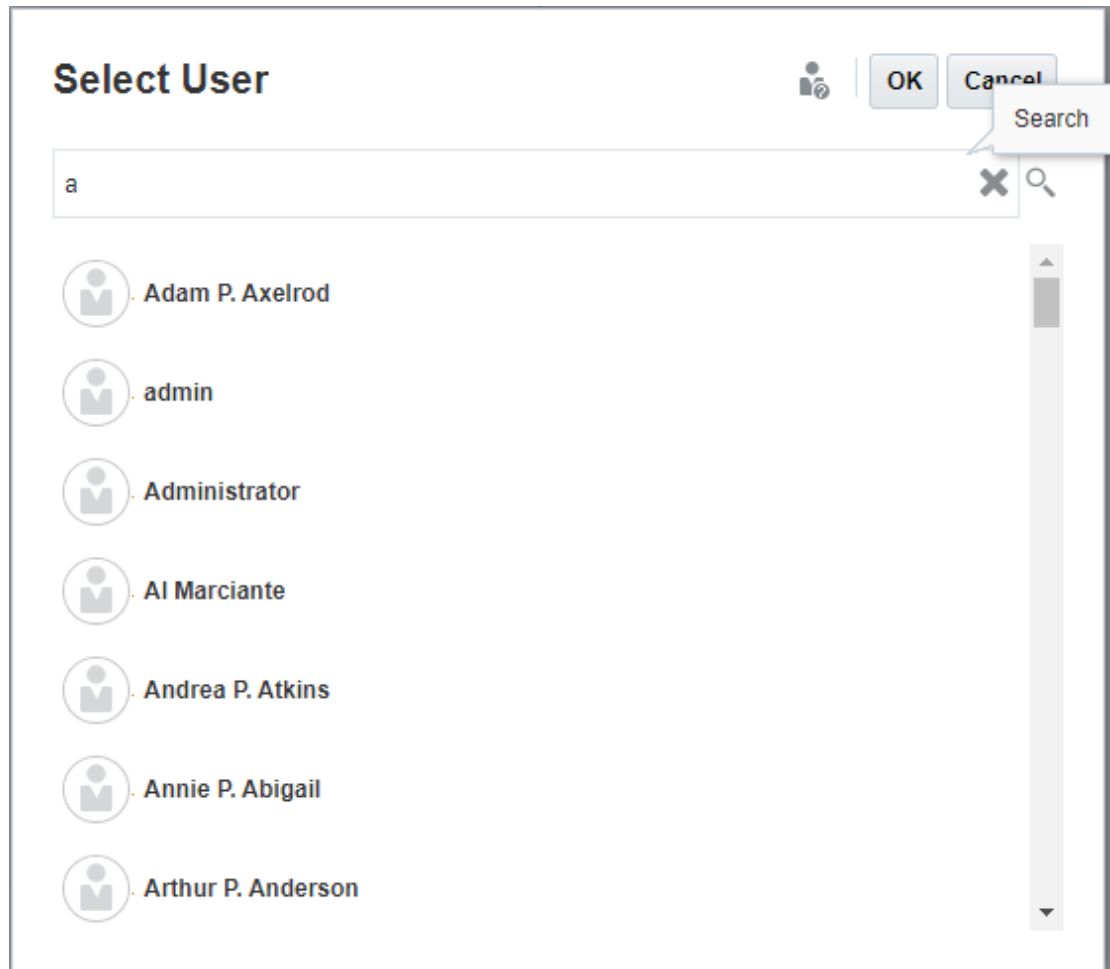
 **Note:**


- Changing the **Connection Name** does not affect any report objects that use the connection.
- Changing the **Server**, **Application**, or **Cube** names causes any report objects that use the connection to point to the new destination.
- For security purposes, you must re-enter the administrator credentials when editing the connection.

## Accessing other Users Libraries


System and library administrators can search for and retrieve the contents of another user's system-generated personal folders or user-generated folder, for example a **My Library** folder. These permissions enable service administrators to view and retrieve a file from another user who isn't available. For example, if someone is on vacation, the report package production workflow can continue.

The service administrators can search a user's library by selecting the select user icon from the User Libraries area of the navigation pane and entering John Smith's name in the search field for John Smith's library and to retrieve the missing file required to complete the report package in John Smith's personal My Library folder.



For information on granting access to library artifacts, see this video  [Granting Access to Library Artifacts](#).

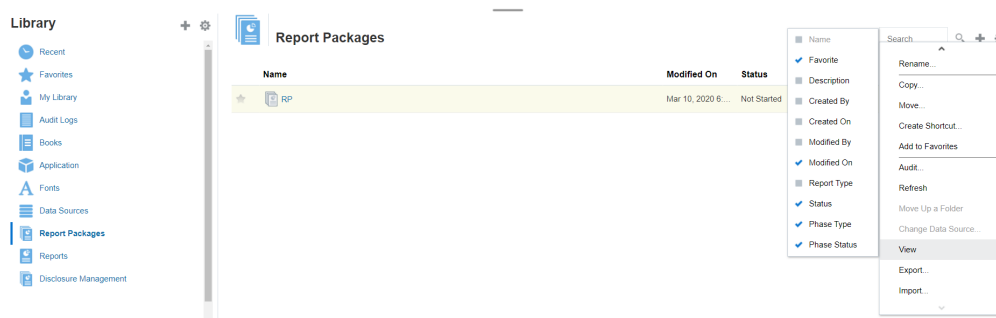
## Setting Default Views for Content Pane Folders and Artifacts

To set a default view for a folder or all folders and artifacts listed in the content area of the library select and clear available column names by selecting the Actions  menu and then the **View** menu. See [Setting Default Views for Content Pane Folders and Artifacts](#). For example, in the figure below Favorite, Type, and Modified On are checked from the View menu, and the respective columns are displayed in the Content area of the library.


### Note:

The list of column names that are displayed for the View menu are determined by artifact, folder type, and a user's privilege.

Figure 6-4 View Menu



### Sorting the Contents of a Folder

You can sort the contents of a folder from the header titles in tables by hovering your cursor in the header title areas and selecting sort ascending or descending  icons.

## Using Audits

Audits are stored in the system-generated **Audit Logs** folder. It contains system-generated audits for the entire system and audit reports that were run on specific artifacts. Audit-type extracts that can be run on library artifacts and folders by a service administrator. An audit extract allows you to view who made changes to an artifact or folder, when it was changed, and what was changed.

Considerations and actions for audits:

- Actions in the system are captured in a running system audit.
- Users can extract audit entries for folders or artifacts to which they have administrator permissions.
- Only audit log type artifacts are allowed in this folder.
- All users can view this folder, but are only allowed to view audit log artifacts that they created.
- Users with the Service Administrator role can view any audit log artifact.
- Users can't copy or move any artifacts into or out of this folder.
- Users can download an audit log artifact and delete an audit log artifact.

For more information, see Perform an Audit.

## Searching the Library


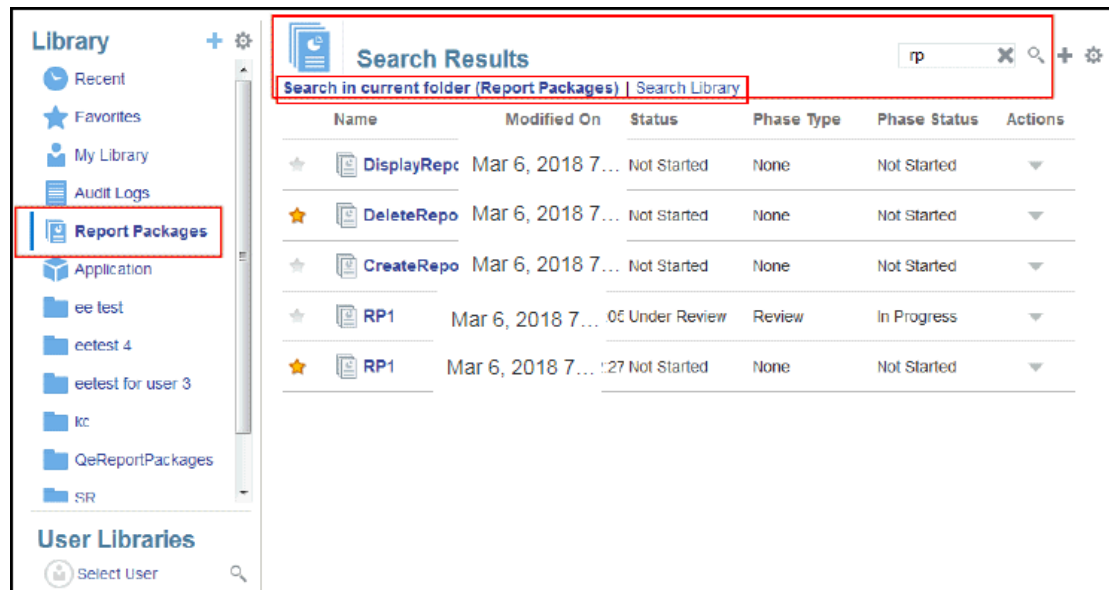

To search for a folder or artifact in the library enter search text in the Search Text box at the top of the content pane and select the search  icon, see [Searching the Library](#). Search results are displayed in the content area. By default, the search is performed in the current folder. Select **Search Library** to expand your search to include the entire library.

Figure 6-5 Search Result Options



## Creating Artifacts in the Library

The library is adaptive and dynamically enforces specific folder rules and actions available on types of artifacts. The actions that are available in the library are location-specific. That is, the actions available to you depend on where in the library you are.

For example, you can create a personal folder to organize artifacts in the library. Click  in the navigation pane or content pane. If you create a folder in the navigation area, the folder is added after the system generated folders but not within. In the content area, you can create a personal folder within any of the following folders that have been selected in the navigation pane to help with organization:



- Favorites
- My Library
- Application
- Any personal folder that you created or can access

Depending on the folder type selected in the navigation pane, you might have more options. For example, if the **My Library** folder is selected, you can inspect and audit.

### Note:

For localized versions of Narrative Reporting, you should not create custom folders spelled the same as a translated system folder. This is due to certain implications when opening the same localized version of Narrative Reporting in English.

## Organizing and Maintaining the Library





From the navigation pane, here are some of the actions available to organize and maintain the library using the Action **Library**   icon to organize or maintain the library.

### Note:

Some of the following actions might not apply to system-generated personal folders or system personal folders.

- **Inspect**—Review and change properties, access, view history. See [Inspecting Folders and Artifacts](#) for more information.
- **Move**—Relocate a folder and the contents to a new location.
- **Audit**—Extract results that can be used to investigate a folder.
- **Refresh**—Update a folder to view the latest changes to the contents.
- **Export**—Makes a zip file of a folder and its contents and adds it to a location of your choosing.

From the **content pane**, depending on the folder type or artifact selected and security applied to the location (folder) or artifact, here are some of the actions available to

organize and maintain the library using one of the Action     or  icons:

- **Download**—Move or copy a folder or artifact to a different location.
- **Inspect**—Review or change; properties and access, and view history for a artifact or folder. See [Inspecting Folders and Artifacts](#) .
- **Delete Favorites Shortcut**—Removes shortcut from Favorites folder.
- **Audit**—Extract results that can be used to investigate a folder.
- **Add to Favorites**—Allows an artifact to be displayed in the system-generated Favorites folder.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose.
- **Import**—Imports a file from library or locally.
- **Copy URL to Clipboard**—Provides a direct URL to open a Library Artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file.

 **Note:**

When an artifact is selected from the content pane of the library, it automatically opens the artifact in its native environment. For example, when you select a report package it opens in the report center. You are prompted to open or save third-party documents, such as XLSX files.

## Taking Actions for Report Packages, Reports, and Applications

Actions that you can take on Library Artifacts vary.

### Report Package

When you select a report package from the Report Packages folder of the library, it opens in the report center. The actions that you can take depends on your role and the status of the report package. See *Create Report Packages*. Available actions for report packages from the content pane:

- **Open**—Open a Report Package.
- **Edit**—Edit report package in the report center.
- **Inspect**—View and change; properties and view access, and view the history.
- **Copy**—Make a copy of a Report Package.
- **Copy URL to Clipboard**—Provides a direct URL to open a Library Artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file.
- **Move**—Move a Report Package to a different folder you have access to.
- **Audit**—Extract audit entries for a report package. See *Perform an Audit*.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose. See *Migrate Artifacts*.
- **View in Library Folder** —See the report package in its library location.

 **Note:**

Available only when **Report Packages** folder is selected.

### Reports and Books

When you select a Report or Book from the Reports or Books folder of the library, it opens the report or Book. The actions that you can take depends on your role and the status of the report. Some of the available actions from the content pane:

- **Open**—Open report in Reports.
- **Open As:**
  - Open **Report** in one of these formats: **Excel**, **HTML** or **PDF**.
  - Open **Books** via **Excel** or **PDF** format.
- **Edit**—Edit report in Reports.

- **Inspect**—View and change; properties and view access, and view the history.
- **Copy**—Make a copy of a report.
- **Copy URL to Clipboard**—Provides a direct URL to open a Library Artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file.
- **Move**—Move a report to a different folder you have access to.
- **Audit**—Extract audit entries for a report . See Perform an Audit.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose. See Migrate Artifacts.
- **View in Library Folder** —See the report in its library folder location.

 **Note:**

Available only when **Reports** folder is selected.

- **Change Data Source** (Reports only)—Select a different source of data for a report.

### Bursting Definitions

When you select a bursting definition from the Bursting Definition folder in the library, it opens the bursting definition for editing. Some of the available actions from the content pane:

- **Edit**—Edit Bursting Definition from the library.
- **Inspect**—View and change; properties and view access, and view the history.
- **Copy**—Make a copy of a bursting definition.
- **Move**—Move a bursting definition to a different folder you have access to.
- **Audit**—Extract audit entries for a bursting definition. See Perform an Audit.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose. See Migrate Artifacts.
- **View in Library Folder** —See the Bursting Definition in its library location.

### Data Sources

When you select a data source from the Data Sources folder of the library, it opens the data source for editing. Some of the available actions from the content pane:

- **Edit**—Edit a data source.
- **Inspect**—View and change; properties and view access, and view the history.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose. See Migrate Artifacts.

### Application

When you select the application from the **Application** folder of the library, it opens in the application center. The actions that you can take on the application depend on your role and permissions. Some actions that you can take from the content pane:



- **Inspect**—View and change; properties and view access, and view history from the Inspect dialog.
- **Audit**—Extract audit entries for a Library Artifact such as a Report Package, Report, Snapshot Report, Book, or a third-party file. See Perform an Audit.
- **Export**—Makes a ZIP file of a folder and its contents and saves it where you choose, see Migrate Artifacts.


Rules for this folder are as follows:

- Only the application artifact resides in this folder. Other child folders and artifacts are also allowed.
- All system users can see the folder and have read access. Additional access to its content is through access security.
- Service administrators, application administrator, and library administrator (specifically for creating child folders) have write access to this folder.

For more information on applications and tasks, see Learn About an Narrative Reporting Application.

## Migrating Folders and Artifacts

From the navigation or content pane, depending on the folder type or artifact selected and security applied to the location (folder) or artifact, you can do the following using one of the

Action  or  icons:

- **Export**—Creates a ZIP file of a folder and its contents and you are prompted to select where to export the ZIP file, see Migrating Folders and Artifacts after the export is complete.
  - Select a folder to export, a Select Folder for Export File is displayed.
  - Select a folder for export. You will receive a notification when the export is complete.
  - A ZIP file is created in the folder you selected for export and the filename is prefixed with `Export -`.

### Note:

To perform a successful folder export, the user must have administer access to all artifacts in the folder.

- **Import**—used as part of the migration process to import a file either from the library or locally, see Migrating Folders and Artifacts for more information on how to complete this task from the library.

### Note:

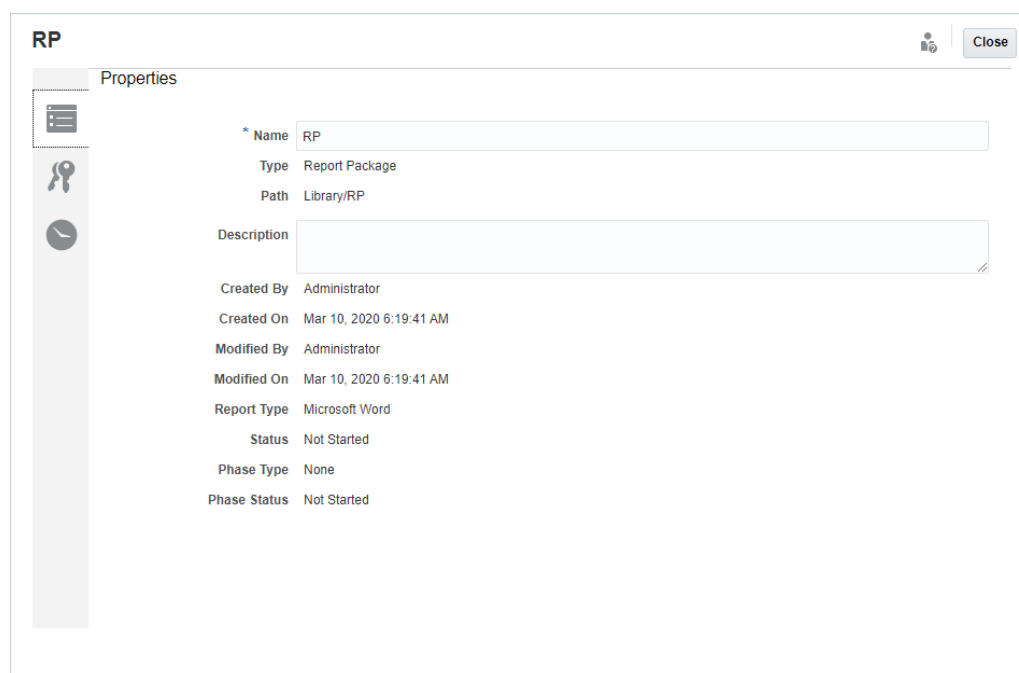
You can also migrate Note Templates, Notes, and Note Formats via the Notes Manager. For more information, see Migrating Notes Artifacts from One Environment to Another.

## Inspecting Folders and Artifacts

The inspect dialog box has Properties, Access, and History tabs:

- Properties— Maintain properties as well as view other details for folders and artifacts.
- Access—Administer security, enable permissions from a parent folder, search for users and groups to assign to this folder or artifact and provide administrative, write, and view access. You can also remove user access to folders and artifacts.
- History—Review the history of artifacts and folders.

**Figure 6-6** Sample Inspect Dialog Box




You can access Inspect from the navigation and content panes for folders and artifacts. From the navigation pane, you can review and inspect the properties tab for the following:


- System-generated personal folders:
  - Recent
  - Favorites
  - My Library
- System-generated folders:
  - Audit Logs
  - Report Packages
  - Application


 **Note:**

For the Application folder, you can also review the Access and History tabs.

In Properties , you can edit names and descriptions of personal folders and folders that you created. You can also view properties related to a folder or artifact.

To assign or view access permissions for a folder or artifact and manage security for a folder

or artifact, use the Access tab . The Access tab is available only for folders and artifacts that you have been given permission. For more information on the Access tab, see Granting Access.

In History , you can view the history for a folder or an artifact. If you selected inspect for a folder from either the navigation or content panes, the history tab displays the results for the folder. Only administrators see history for all of the artifacts in a folder.

## Copying a URL to Clipboard

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 Library Artifacts

To copy a URL, perform these steps:

1. Log into Narrative Reporting Cloud. On the **Home** page, select **Library**.
2. Navigate to a **Library** artifact such as **Report Packages**, **Reports**, **Report Snapshots**, or **Books**. For example, if you select **Reports**, highlight a Report, and then click the **Actions** icon to select **Copy URL to Clipboard**.

3. Paste the URL where needed. Upon clicking on the URL, the Library artifact will be launched in a browser window.

### **Copying a URL to download the Third-party File**

To copy a URL and download third-party files such as an MS Office or PDF file, perform these steps:

1. Log into Narrative Reporting Cloud. On the **Home** page, select **Library**.
2. Navigate to, and highlight, a third-party file and then click the **Actions** icon to select **Copy URL to Clipboard**.
3. Paste the URL where needed. Upon clicking on the URL, a browser window will be launched. Select **Download** to view the file.

# 7

## Using the Appearance Icon

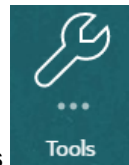
Change the theme of your display or add your company logo or a background image to the Home page.

On the **Appearance** page, you can change the general look and feel of your Oracle Enterprise Performance Management Cloud environment. Enabling the Redwood Experience not only provides a new application look and feel, but it also includes certain features, such as dynamic tabs, that are not available in the other themes. If you opt not to use the Redwood Experience, you can choose instead from a list of predefined classic themes with different background colors, icon styles, and so on. You can also add a branding logo and background images to the Home page and hide the business process name. For general information about using the Home page, see [About the Home Page](#).

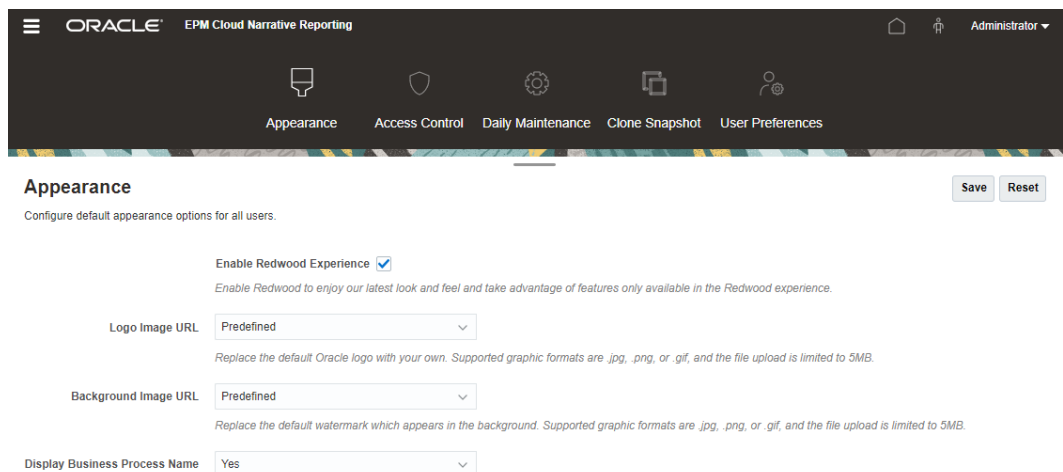
### Note:

You can set your profile picture to display at the top of the Announcements panel of the Home page in **User Preferences**. Click **Tools**, and then **User Preferences**. For more information, see [Using the General Tab](#).

To customize your display:



1. From the Home page, click **Tools**.
2. From the **Tools** pane. Click **Appearance**.



**Appearance** Save Reset

Configure default appearance options for all users.

Enable Redwood Experience  
Enable Redwood to enjoy our latest look and feel and take advantage of features only available in the Redwood experience.

Logo Image URL:   
Replace the default Oracle logo with your own. Supported graphic formats are .jpg, .png, or .gif, and the file upload is limited to 5MB.

Background Image URL:   
Replace the default watermark which appears in the background. Supported graphic formats are .jpg, .png, or .gif, and the file upload is limited to 5MB.

Display Business Process Name:

3. Choose from the following customization options:
  - **Enable Redwood Experience**—Select to enjoy our latest user experience and to take advantage of features only available in the Redwood experience. If this option is disabled, the **Theme** option is displayed.
  - **Theme**—Only available if you clear the **Enable Redwood Experience** option. Select an option from the list of predefined classic themes.
  - **Logo Image** and **Background Image**—Replace the predefined Oracle logo and theme-based background image with your own images. Select **File** to choose a locally stored custom image file, or select **URL** to choose a custom image URL. Supported graphic formats are .jpg, .png, or .gif and the file upload is limited to 5MB. Select **Predefined** to choose the theme-based logo and background images.
  - **Display Business Process Name**—By default, the business process name is displayed next to the logo on the Home page and on the tab when a browser tab is opened. If **No** is selected, the business process name is hidden on the Home page and **Oracle Applications** is displayed on browser tabs.
4. Click **Save**.

 **Note:**

- You can't edit or delete predefined themes or create custom themes.
- Both the logo and background image can be customized. Any logo image smaller than 125px wide and 25px high can fit without scaling. For large image logos, Oracle recommends that you maintain a 5:1 ratio so the image is scaled without distortion.

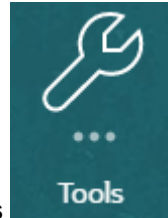
The default size for the background image is 1024x768. You can use a larger background image, however the image is scaled to fit the resolution setting of your display and the image is centered horizontally. If you want your background image to fit both a browser and a mobile device, Oracle recommends that you size the image so that it fits your biggest screen (or highest resolution device).
- When switching to a new theme, customers using a custom background image might need to ensure that the color contrast for icons and labels is appropriate. To remedy, consider choosing a different theme or a suitable background.

# 8

## Managing User Preferences

Manage your user badge photo, notifications, and other display items by modifying your personal preferences.

To modify User Preferences settings:

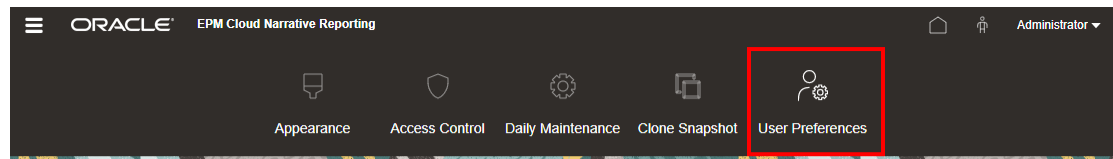


1. From the Home page, click **Tools**.
2. From the **Tools** pane, click **User Preferences**.

As a user, most of the standard preferences are inherited from the browser or your operating system and set automatically. The following optional items on the **General** tab should be confirmed when you first start to use the service:

- My Photo—Photograph of user
- Locale—Language and Time Zone
- Show Confirmation Messages—Turn on or off system messages to the user

To modify settings, select **Preferences** from the menu beside your user name from the Home screen. Select one of the **Preferences**, located on the left side, to view and modify settings. If you decide not to keep the changes, see [Resetting Preferences](#) below.



### Preferences

Save Reset

#### General

Notification

Formatting

Library

Reporting

#### Profile



Administrator

Upload Photo logo.jpg Update...

#### Locale

Language Default - "English" ▾

Time Zone Default - "(UTC-08:00) Los Angeles - Pacific Time (PT)" ▾

Current date and time: Feb 22, 2021 10:01:34 AM

#### Show Confirmation Messages

Click Show Messages to resume displaying confirmation messages.

Show Messages

## User Preferences Icon

The following tabs are available from the Preferences dialog box:

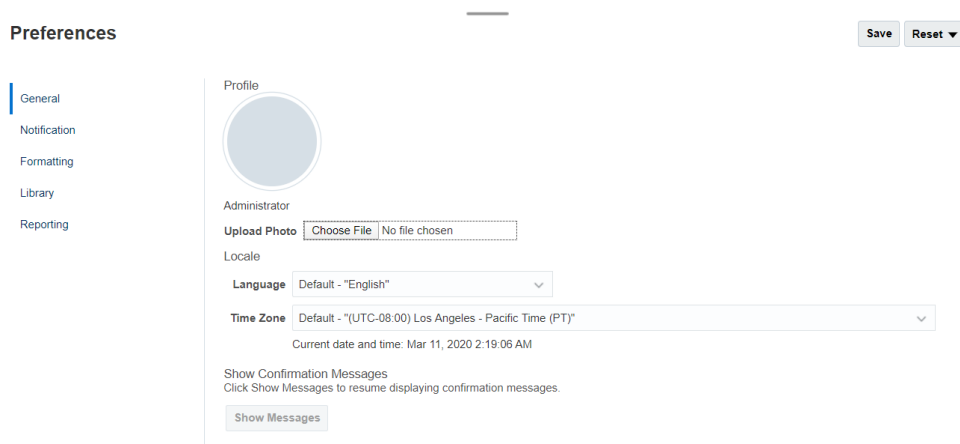
- [Using the General Tab](#)
- [Using the Notification Tab](#)
- [Using the Formatting Tab](#)
- [Using the Library Tab](#)

## Using the General Tab

Use the General tab to manage the main preferences such as the photo you want to associate with a user, the language you want to use, and whether or not to display system conformation messages:

- Under **My Photo**, select an image file to upload as a photo.

Select the **Choose File** button as shown in the figure below to select and upload a photo.



An example of how this photo is used is to display beside a workflow task in a report package.

Name	Responsibility	Author
Management Report		
Management Report Doclet		Adam Mar 27, 2015

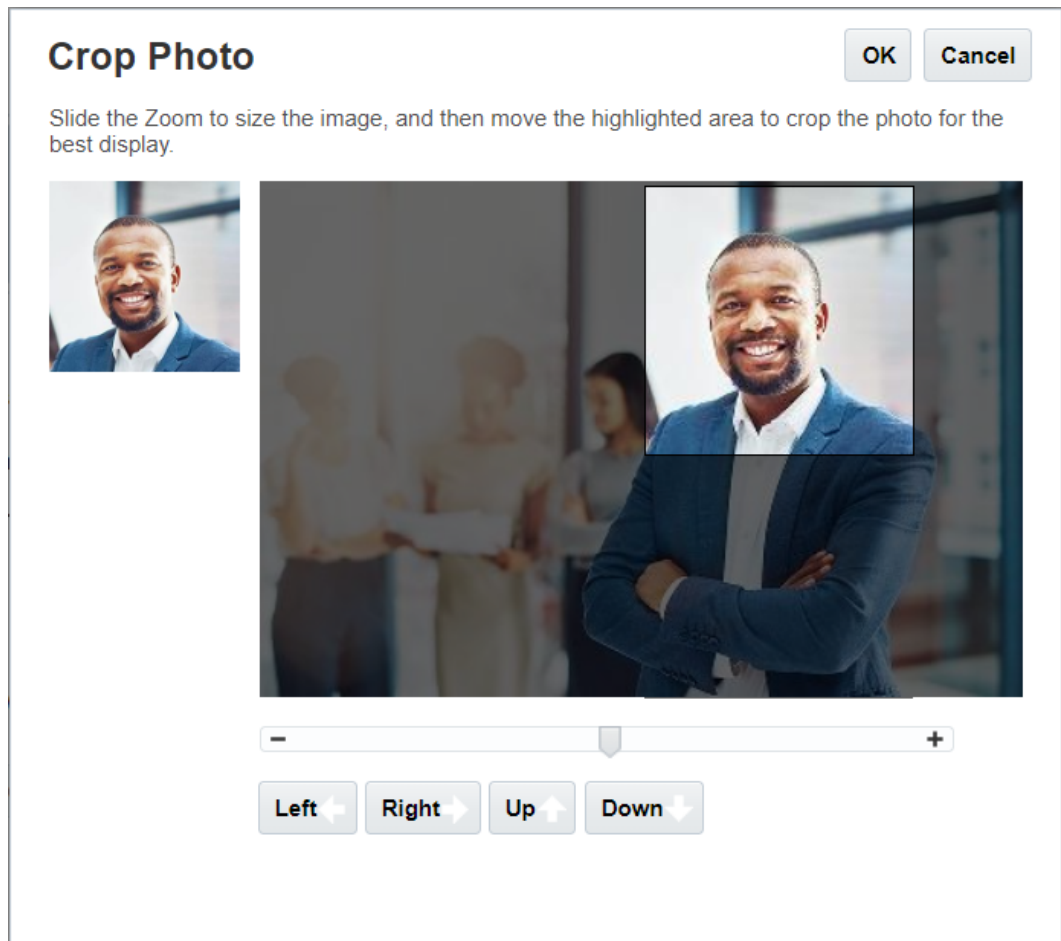
Use the Zoom control slide to size the image. Then, drag the highlighted square area to crop the image for best display or use the





jpg, .png, and .gif.

buttons. The supported formats for photos are:



- Under **Locale**, the default language for your browser is selected. Text, buttons, and messages are displayed in the selected language. You can select another language, if desired. If you do so, you must sign out and sign in again for the language setting to take effect. Select a time zone that you want to use for displaying time. The current date and time are displayed.

 **Note:**

If you do not set your language in the **Preferences - General** tab, then the language displayed for the user interface is derived from your Browser settings. For email notifications, the default language is English. If you would like to receive notifications in a language other than English, select the specific language from the **Language** drop down menu (not Default - "Language") from the **Preferences - General** tab. For example, if you want Spanish to be your default language, select Spanish from the **Language** drop down menu.

The time zone you select can be different than the time zone you are in.

- Under **Show Confirmation Messages**, if you have turned off the feature to display system confirmation messages, you can turn system confirmation messages on again by selecting **Show Messages**.

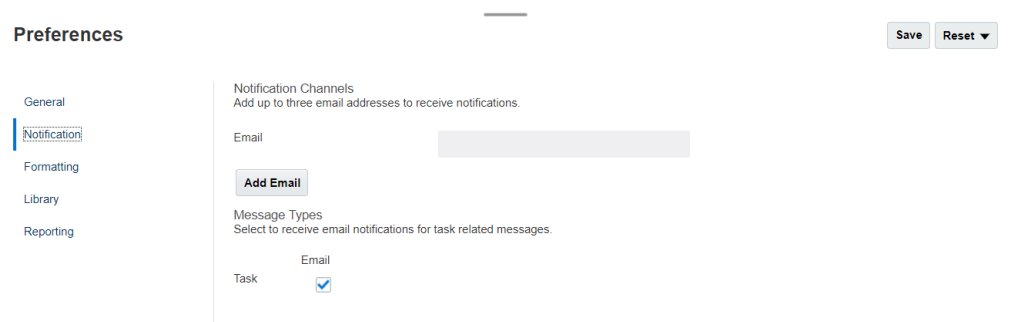
## Using the Notification Tab

After the author phase of the report package is started, notifications are sent to advise users that are impacted of any tasks to which you have been assigned, such as creating a doclet, reviewing sections, signing off on a sign off instance, or approving a report package. You can also participate in email discussions related to the report package with other users.

### Note:

Although you have set the Date and Time format in the Preferences – Formatting tab, notifications that you receive may have a different format due to internal architectural constraints.

An email notification channel is automatically assigned to the email address associated with your user profile set by your Identity Domain Administrator. You can add three additional email addresses. You can manage which email addresses receive notifications by selecting or deselecting the Email check box under Message Types.



The screenshot shows the 'Preferences' window with the 'Notification' tab selected. On the left, a sidebar lists 'General', 'Notification', 'Formatting', 'Library', and 'Reporting'. The main content area is titled 'Notification Channels' and includes the instruction 'Add up to three email addresses to receive notifications.' Below this, there is an 'Email' input field and an 'Add Email' button. Under the 'Message Types' section, which is titled 'Select to receive email notifications for task related messages.', there is a table with two columns: 'Task' and 'Email'. The 'Task' column has a single entry 'Task', and the 'Email' column has a checked checkbox.

## Using the Formatting Tab

You can define the display formats of numbers, dates, and times for your report packages with the settings on this tab as well as the unit of measurement for management reports for page size, margins, and indents.

## Preferences

Save Reset ▾

General  
Notification  
Formatting  
Library  
Reporting

## Formatting

Format Locale Default - "English" ▾

## Number

Thousands Separator Default - "Comma" ▾

Decimal Separator Default - "Period" ▾

## Date

Format MMM d, yyyy ▾

## Time

Format h:mm:ss a ▾

## Unit of Measurement

Format Inch ▾

Use the Format Locale menu to select default values for numbers, dates, and times for your location. For example, the "English (United States)" locale formats the thousands separator with a comma, the decimal separator with a period, and the date with the three-letter abbreviation for month, followed by the day and year.

You can either change these settings manually, or you can use the Format Locale menu to select the default values for a different locale. For example, the "Spanish (Spain)" locale formats the thousands separator with a period, the decimal with a comma, and the date with the day, month, and year.

The following commonly used formats are available for thousands and decimals separators:

- **Default** is the value provided from your operating system.
- **Comma** (for example, 100,000 or 95,91).
- **Period** (for example, 100.000 or 95.91).
- **Space** (for example, 100 000 or 95 91).
- **Apostrophe** (for example, 100'000 or 95'91).

Similarly, for Date and Time, select the format that you want to use for display purposes.

**Note:**

You can customize your time formats, using the Customize option which presents a text box to enter a custom sequence for your unique requirements using standard time formats.

Date formats:

- M—Month
- d—Day
- y—Year

- E—Day of the Week

Time formats:


- a—AM/PM
- h—Hour
- m—Minute
- s—Second
- z—Timezone

## Using the Library Tab

You can set the maximum number of artifacts that you want to display on your Recent folder in the library. For example, if you select ten as in the figure below, the last ten artifacts you accessed are listed in the Recent folder.



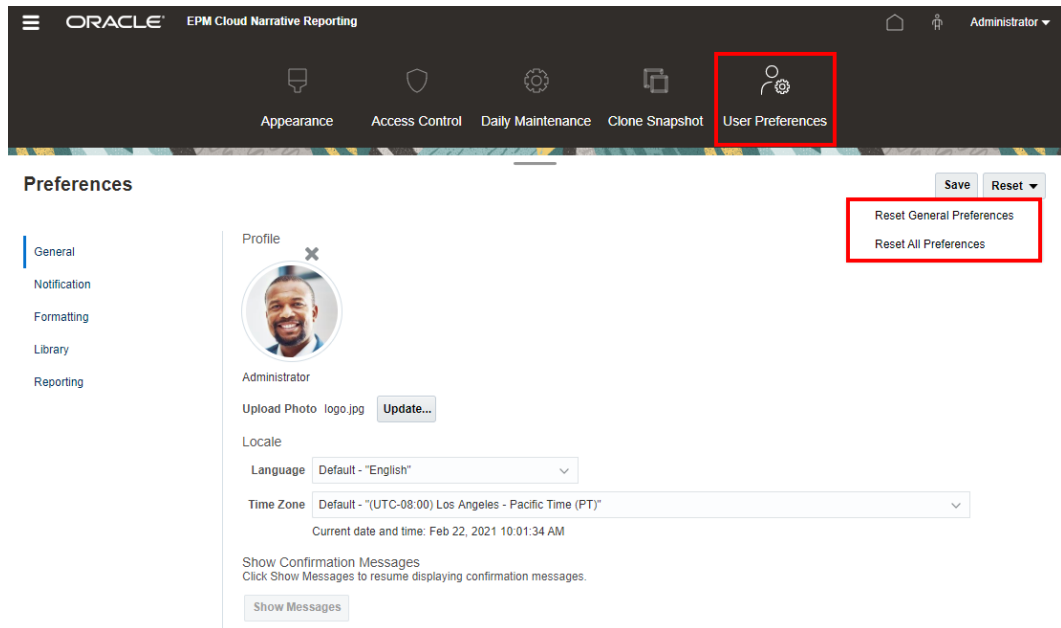
## Resetting Preferences

To restore your preferences to the default values, select  and use one of the following options:

- **Reset *name of tab***, in this example **Reset General** to undo any modifications that were applied and restore default values on the Preferences tab.
- **Reset All Tabs to Default** option from any Preferences tab to reset every preference value on all tabs of the Preference dialog box to the original default values from initial use.

### Caution:

All changes, whether applied or not, are removed.



## Previewing a Report POV

In Narrative Reporting, after setting the **Preview POV** from the **Reporting** preferences that enables a user to preview the POV of a report. It also requires you to manually execute the report by selecting the **Run Report** button. A report user can also switch the report output type prior to selecting the **Run Report** button.



### Note:

The default option for the **Preview POV** preference is disabled.

