

Oracle® Fusion Cloud EPM

Working with FreeForm



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Oracle Fusion Cloud EPM Working with FreeForm,

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1

Creating and Running an EPM Center of Excellence

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

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

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

The EPM CoE team:

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

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

How Do I Get Started?

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

Learn More

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



2

Welcome

FreeForm is a Reporting, Analysis, and Planning application, and it enables you to work in an application with no required dimensions. It lets you model and build your own cubes and dimensions while using many of the available features in EPM Cloud.

Related Topics

- [About FreeForm](#)
- [Navigating Across EPM Cloud Business Processes](#)
- [Copying Direct URLs for Artifacts](#)
- [Sharing the Current Page URL for Cards, Tabs, and Sub Tabs](#)
Copy the URL for the currently displayed card, tab, or sub tab and share it with other users who have access.
- [Other Navigation Tips](#)
- [Using Dynamic Tabs in Redwood Experience](#)
Work on related artifacts within tabs without navigating away from a parent artifact.
- [Learning More](#)

About FreeForm

With FreeForm, you can model and build your own cubes while preserving the ability to leverage business process functionalities.

FreeForm can be accessed using Oracle Smart View for Office or Oracle Enterprise Performance Management Cloud screens; they support Groovy scripts for custom functions, and business rules for calculations.




Note:

The following features are not available in FreeForm because these features require the provided Scenario, Version, Period, and Year dimensions to be present:

- Predictive Planning
- Auto-Predict
- IPM Insights

In FreeForm, if the Scenario, Version, Period, and Year dimensions exist, they are defined as custom dimensions.

Videos


Your Goal	Learn How
Get an introduction to FreeForm.	 Introduction to FreeForm Apps in Cloud EPM

Navigating Across EPM Cloud Business Processes

After an administrator creates connections to other EPM Cloud business processes, the connections are listed in the **My Connections** pane on the **Navigator**.

You can toggle between the business processes from this location. You must have access to the other business processes in order to open them. Artifacts are accessible based on your role.

To open another Oracle Enterprise Performance Management Cloud business process:

1. From the Home page, click **Navigator** .
2. If business processes are connected and you have access to those business processes, you'll see a list of connected business processes in the **My Connections** pane. Click a business process to open it.



Note:

Click the icon to the right of the business process name to open it in a new window.

Copying Direct URLs for Artifacts

Use the **Copy URL** option on the artifact listing page to copy the unique URL for an artifact (dashboards, forms, infolets, and reports) in your Oracle Enterprise Performance Management Cloud business process.



Note:

Copy URL is available to all users so that direct URLs to artifacts can be shared. However, only users with access to the targeted artifact can perform actions on it.

To copy the unique URL for an artifact:

1. From the Home page, open the listing page for the artifact.
For example, click **Dashboards**, **Data**, **Infolets**, or **Reports**.

2. From the listing page, click **•••** next to the artifact, and then select **Copy URL**.
3. The **Copy URL** dialog displays the unique URL for the artifact. Copy the URL.

Copied URLs can, at times, become invalid. Possible reasons for invalid URLs include:

- The artifact is deleted.
- User access for the artifact is revoked.
- The artifact is renamed, which breaks the URL.
- The artifact is moved to a new folder, resulting in a new URL, which breaks the URL.

Sharing the Current Page URL for Cards, Tabs, and Sub Tabs

Copy the URL for the currently displayed card, tab, or sub tab and share it with other users who have access.

Use the **Share Current Page URL** option on the **Settings and Actions** menu to copy the URL for the currently displayed card, tab, or sub tab in your Oracle Enterprise Performance Management Cloud business process.

URLs can be copied and then shared with other users in an email, Slack, or any other messaging application. Also, copied URLs can be used in a slide show presentation such as PowerPoint. Note that users can only access cards, tabs, or sub tabs if they are authorized to access them.

When the copied URL is launched the page will be rendered with the full header, meaning they will be able to navigate to all of the pages to which they have access within the navigation flow. If the user launching the URL is not logged in, they will be redirected to a login page, then after login the URL page will open.

To copy a URL for sharing:

1. Navigate to the page (card, tab, or sub tab) in your application that you want to copy.
For example, from the Home page, click Dashboards to view the Dashboards page.
2. Click the down arrow next to your user name (upper right corner of the screen).
3. On the **Settings and Actions** menu, select **Share Current Page URL**.

Note:

The **Share Current Page URL** menu option only displays if you're currently viewing a card, tab, or sub tab. If you're currently viewing the Home page, the **Share Current Page URL** menu option won't display on the **Settings and Actions** menu.

4. Select the displayed URL and copy it by pressing Ctrl+C.

After pasting it into a browser, the URL will enable direct access to the current page in the application.




Considerations

Note the following considerations when using the **Share Current Page URL** option:

- The page specified in the URL will not open if the navigation flow was deleted, modified, or made inactive. Instead, you'll be redirected to the home page of the currently active navigation flow.
- If you're using a classic environment, you cannot share URLs. URLs are not supported for classic pages.
- URLs cannot be embedded into dashboards as the content source.
- URLs cannot be embedded into navigation flows as the content source.
- URLs cannot be shared for pages with dynamic tabs. Dynamic tabs are local and limited to the current user session, and therefore cannot be shared.
- URLs cannot be shared for infolets. URLs are not supported for infolets.

Other Navigation Tips

Here are other navigation tips:

- To return to the Home page, click the Oracle logo  (or your custom logo) at the top of the page or click the Home icon .
- To access functionality on the Navigator page, click the horizontal bars  in the upper left corner of the page next to the Oracle logo (or your custom logo).
- Hover in the upper right corner of a form or dashboard to see options such as **Actions**, **Save**, **Refresh**, **Settings**, and **Maximize**.

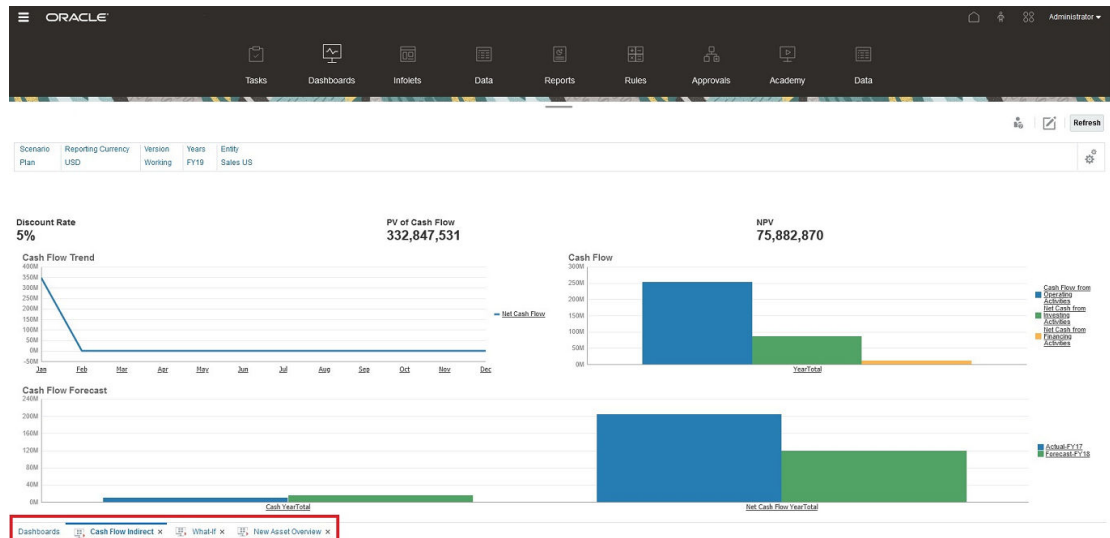


Using Dynamic Tabs in Redwood Experience

Work on related artifacts within tabs without navigating away from a parent artifact.

About Dynamic Tabs

Dynamic tabs enable you to view multiple artifacts on a single page. For example, if you've a form open, you can open other related forms, and dashboards. These additional artifacts are denoted by horizontal tabs at the bottom of the page. This feature is for users who do want to view multiple artifacts simultaneously, but don't want to have multiple browser windows open. The dynamic tabs feature is available only if Redwood Experience is enabled.



Dynamic tabs terminology:

- **Dynamic Tab:** A tab that is added at the bottom of the page to the right of the source tab when a related artifact is launched. Only dynamic tabs will display a close icon.
- **Source Tab:** The page from where the dynamic tab was launched.

If your Oracle Enterprise Performance Management Cloud environment includes tabs from another EPM Cloud environment, dynamic tabs are supported for those cross-environment tabs.

Considerations When Using Dynamic Tabs

- You must enable Redwood Experience to use dynamic tabs. If you're using a theme other than Redwood Experience for your business process, dynamic tabs aren't available.
- You can open up to 30 tabs on a page. If you attempt to open more than 30 tabs, you'll see a message prompting you to close a few tabs before opening new tabs.
- Long artifact names will appear truncated on tabs.
- The **Actions** menu in the Redwood Experience only displays global options. It no longer displays the same options as the right-click menu in forms. To view form-specific options, (for example, **Consolidate** or **Translate** in Tax Reporting), right-click a row, column, POV, or cell in the form.

Working with Dynamic Tabs

Source and dynamic tabs display at the bottom of the page on which you're working.

When you launch a new dynamic tab from an existing tab or listing page, the new tab is added to the right of the existing tab and the focus will move to the newly launched tab.

Dynamic tabs are preserved for the current session only. The last tab displayed is retained the next time you access the page within the same session. If you log out and then log back in, if you reload a navigation flow, or if you switch to another navigation flow, dynamic tabs won't be retained. If there is any unsaved data, you'll be prompted to save it before you proceed.


Each new action you perform opens a new dynamic tab. For example, you perform a drill through on Form1 and then perform a drill through on Form2, this will open two dynamic tabs.

If you perform another drill through on Form1, the action will relaunch the previously opened tab.

Artifacts that were launched in dynamic tabs will also be listed in your recent history on the Announcements Panel. Dynamic tabs can also be added to **Favorites** in the Announcements Panel.

Dynamic tabs display a close icon. If there is any unsaved data on a tab, you'll be prompted to save it before closing the tab. After a tab is closed, the focus will move to the tab that's to the left of the closed tab. If you're closing a tab that's not in focus, the focus remains on the tab that's currently in view. To close all dynamic tabs, right-click any horizontal tab displayed at the bottom of the page and click **Close All Tabs**.

Videos

Your Goal	Watch This Video
Learn how to navigate with dynamic tabs to multi-task with different artifacts. With dynamic tabs, you can open related artifacts while keeping the original artifacts open.	 Navigating with Dynamic Tabs

Learning More

To access a variety of resources on using FreeForm, click **Academy**



on the Home page.

Administrators: To create and manage the application, see [Administering FreeForm](#).

3

Preparing to Work in FreeForm

Related Topics

- [Before You Begin](#)
Here are a couple of things to know before you start working in FreeForm.
- [Familiarizing Yourself with FreeForm](#)

Before You Begin

Here are a couple of things to know before you start working in FreeForm.

Your administrator may have created user variables that you must select before you can open a form. See [Setting User Variables](#) and [Dynamically Setting User Variables](#).

You can also set preferences for such aspects as how you want numbers displayed and your time zone and date format. See [Setting Your Preferences](#).

The Announcements panel on the left side of the Home page helps orient you.

- Your administrator can provide announcements.
- See your open tasks for the day.
- View your recent history, for example, the forms or dashboards you've used.
- Return to your frequently-used forms or forms by tagging them as a Favorite.
- If your administrator created infolets to show high-level important information, explore them by clicking the dots towards the top of the page.



You can set which infolet you want as the default. See *About Infolets* in *Administering FreeForm*.

- Set your profile photo. See [Setting Your Profile Picture](#).

Familiarizing Yourself with FreeForm

FreeForm helps you create and update plans quickly:

- Easily navigate pages among common planning tasks from the Home page.
- Enter data in forms. See [Working with Data in Forms](#).
- Follow a structured process for creating plans using tasks lists. See [Working with Task Lists](#).
- View and analyze key information graphically using dashboards. See [Using Dashboards to Work with Data](#).
- Get a quick overview of top-level information using infolets. See [Viewing Key Information with Infolets](#).
- Focus your analysis with ad hoc grids. See [Using Ad Hoc for Data Entry and Analysis](#).

- Adjust and spread values. See [Adjusting and Spreading Data](#).
- Use the built-in calculator. See [Working with Supporting Detail](#).
- View reports that summarize data. See [Working with Reports](#).
- Leverage your experience with Microsoft Excel by using Oracle Smart View for Office. See [Working with Business Process Data in Excel](#) and *Oracle Smart View for Office User's Guide*.
- Run calculations. See [Using Business Rules](#).
- Set preferences for how you want to work with FreeForm. See [Setting Your Preferences](#).

4

Working with Data in Forms

Related Topics

- [You Enter Data in Forms](#)
- [About Forms Versions](#)
- [Opening Forms](#)
- [Exporting Data to Microsoft Excel](#)
By exporting data from a form to Microsoft Excel, you can explore "what-if" scenarios in Excel before copying and pasting values back to your business process.
- [Working in Forms 1.0](#)
- [Selecting Different Data to Work With](#)
- [Understanding Form Colors](#)
- [Viewing Server Status on Forms](#)
- [Navigating Quickly in a Form](#)
- [Basics of Working With Data](#)
- [About Entering Data](#)
This topic gives you some tips on entering and saving data.
- [Entering Different Kinds of Data](#)
- [Entering Data Quickly Using Commands](#)
- [Searching in Forms](#)
- [Selecting Cell Ranges](#)
- [Copying and Pasting Data](#)
You can copy data within a form, from one form to another, or from another product, such as Microsoft Excel.
- [Dynamically Setting User Variables](#)
If your administrator set up a form with at least one user variable and enabled dynamic user variables, then you can select and change user variable values directly in the form.
- [Using Data with Forms](#)
When you're in a form, you can make the data more meaningful in many ways.
- [More Ways to Manipulate Values](#)
Here are some easy ways to manipulate data:
- [Entering Data for Suppressed or Excluded Members](#)
In forms, users can directly select a member from the drop-down list on the row dimension in the form, and then enter and save data for that member.
- [Getting the Latest Data](#)
- [About Calculating Data](#)
Values are automatically totaled as you enter data. Here are other ways to calculate data:

- [How Totals are Calculated](#)
Here's how values are subtalled and totalled:
- [Reviewing Data](#)
You can review and analyze data in many ways.
- [Personalizing How Data Displays](#)
You can customize how data displays in a form, for example, with formatting and hiding rows and columns having no data.
- [Emphasizing Data with Formatting](#)
In forms and ad hoc grids, a variety of formatting options help you emphasize certain data.
- [Hiding Rows or Columns That Have No Data or Zeros](#)
To simplify the data in a form, you can hide rows that have no data or contain zeros.
- [About Cells That Have No Data](#)
#MISSING in a cell indicates that the cell contains no data, whereas zero in a cell is a data value.
- [Printing Data](#)
You can print data in forms as PDF files and customize its format if Adobe Acrobat Reader 5.0 is installed on your computer.
- [More About Working With Data](#)
- [Viewing Member Formulas](#)
Your administrator can set up member formulas to perform calculations on members.
- [Working with Business Process Data in Excel](#)
If you're familiar with working in Microsoft Excel, you may want to work with your business process data in Oracle Smart View for Office.
- [Using Your Own Excel Formulas in the Business Process](#)
In Oracle Smart View for Office ad hoc analysis, you can create your own Excel formulas and members that calculate instantly without affecting other data. You can then open this *Smart Form* in your business process and execute the calculations that you created in Smart View.
- [About Smart View Formatting in Web Forms](#)
Depending on how your administrator set up the form, a form may display the cell formatting that you saved in Oracle Smart View for Office.
- [Copying and Pasting Data Between Microsoft Excel and Your Business Process Forms](#)
If you're accessing your business process from a desktop, you can copy and paste data between Microsoft Excel and forms.
- [Drilling Through to Source Data](#)
Your administrator can load data from a source using Data Integration or the business process import and export functionality. You can drill through to view details of the data source.
- [Cell Icons](#)
Icons in a form's cell provide information. Here's what they mean.
- [Resolving Data Validation Errors](#)
Your administrator can set up data validation rules to ensure that data meets company guidelines.

- [Pushing Data for Reporting](#)
For meaningful and complete reporting, your administrator can set up forms so that you can analyze data coming from different cubes using **Smart Push Details**.
- [About Cell Comments](#)
To explain data or provide background, you can add comments to a cell or to a range of cells across multiple dimensions.
- [Working with Attachments](#)
You can provide background information on data by attaching a file to a cell.
- [Searching for Forms, Dashboards, and Infolets](#)
You can easily search for specific forms, dashboards, and infolets from their listing page.
- [Why Cells May Be Read-Only](#)
Learn why you can't change data in some cells.
- [Seeing What's Changed](#)
If your administrator has enabled audit trails for certain items, you can see their history of changes.
- [Working in Forms 2.0](#)
- [Working with the Global Toolbar in Forms 2.0](#)
- [Working with the Quick Toolbar in Forms 2.0](#)
- [Working with POVs in Forms 2.0](#)
- [Opening the Member Selector in Forms 2.0](#)
To select members in Forms 2.0, use the member selector.
- [Performing Calculations Without Having to Submit Your Changes \(Calc on the Fly\)](#)
Use calc on the fly to change data values and see calculated changes instantly without submitting the updated values.
- [Printing Data in Forms 2.0](#)

You Enter Data in Forms

Administrators design *forms* as containers in which you enter, update, analyze, print, and report on data.

You enter data into the cells in structured forms, and each form has a special purpose. For example, the administrator may design a form solely for creating a revenue plan for your product line or for comparing last year's actual expenses against this year's projected expenses.

With the forms's objective in mind, the administrator sets up the form with certain dimensions and members, reflected in the row and column headings. An example of a dimension is Year, and its members may include FY21, FY22, and FY23. Cells display data for the selected members.

Forms 2.0 FreeForm Example

The following example shows a 2.0 version of a FreeForm form:

About Forms Versions

Forms are currently available in two versions:


- **Forms 1.0:** Uses Slick Grid with Oracle ADF Fuse components
- **Forms 2.0:** Uses Slick Grid with Oracle JET components

Both forms versions currently coexist in the same business process at the same time. Forms 1.0 is the default version for existing applications. Forms 1.0 behavior remains unchanged. You can still create and update these forms in your business process as you did before. All newly created applications will default to Forms 2.0.

Forms 2.0 Features

Forms 2.0 is available only if **Redwood Experience** is enabled. Forms 2.0 uses the existing Forms 1.0 runtime functionality and enhances it using Slick Grid with Oracle JET components for faster rendering, sophistication, ease of use, and consistency.

Forms 2.0 features include:

- Major improvements in usability and ease of use
- Better scalability and enhanced performance
- Runtime updates only; only runtime forms have adopted the new technology and user interface
- Standardized **Actions** menu for form actions
- New POV settings  menu
- New quick toolbar for performing certain common form grid actions
- Performance improvements for grids
- Improved comments updates, including multi-cell selection and comments entry
- Comments and Attachments can be added using a single option
- Seamless vertical or horizontal scrolling

- Better screen space utilization
- Faster cell to cell navigation
- Quick scrolling across data grids
- Forms and POV drop downs use a new sophisticated, hierarchical member selector with the ability to search
- Reduced popups
- Clean new icons and dialogs
- Built in sophisticated line item detail (replacing supporting detail)
- Wizard-based business rule runtime prompts; runtime prompts display as drawer from the right side
- Calc on the fly on the grid
- Stateless protocol for data retrieval
- Quicker refresh time on large grids
- Improved consistency between Web forms and Oracle Smart View for Office
- Improvements in web ad hoc
- Ability to **Save As** with a new form name
- Edit opens the Forms Designer in a new dynamic tab

Setting the Forms Version

If you've been using Forms 1.0, there's no migration needed to use Forms 2.0. You can easily switch between the two versions using an application setting. The forms will be rendered in the runtime environment to whichever version you specify. No form redesign is necessary.

To specify a forms version:

1. Click **Application**, and then click **Settings**.
2. Under **Other Options**, find the **Forms Version** setting.
3. Select a forms version. The default **Forms Version** for existing applications is **Forms 1.0**. Enabling **Forms 2.0** is only supported if Redwood Experience is enabled.

Considerations for Forms 2.0

- The Autosave option is not supported in Forms 2.0. Instead, perform calc on the fly to see your changes without having to submit changes to the database and refresh.
- Exporting to Excel is not supported in Forms 2.0. Use the **Actions** menu to open a form in Smart View and then save the Excel worksheet natively.
- Forms 2.0 runtime filtering supports column filtering. Runtime filtering on rows will be supported in a future update of Forms 2.0.
- Web form runtime formatting is not supported in Forms 2.0. It will be replaced with design time formatting in a future update.
- The Planning Modules Configuration Wizard is not supported in Forms 2.0.
- All future web form enhancements will be in Forms 2.0.

Related Topics

- [Working in Forms 1.0](#)
- [Working in Forms 2.0](#)

Opening Forms


Each form represents a subset of data in your business process.


See [You Enter Data in Forms](#).

To open a form:


1. On the Home page, click **Data**.
2. You can filter forms by folder or type.
3. Under **All Types**, depending on the type of form you want to use, click the appropriate icon:



- **Simple** 












- **Ad Hoc**  : Ad hoc grids aren't confined by the form's design.
See [Using Ad Hoc for Data Entry and Analysis](#).

4. Click  to expand the folder the form is in.
5. Click the name of the form to open it.

For example, to update the accessories chart form, click "Accessories Chart".

Data Entry  [Refresh](#) [Create](#)

Search  Library  All Types

Name	Description	Created	Last Modified	Instructions	Actions
 Plan		8/6/25	epm user 8/6/25		...
 1 Revenue Plan by Market Size		8/6/25	epm user 8/6/25		...
 Accessories Chart		8/6/25	epm user 8/6/25		...
 Activity Ratios - Plan vs Target		8/6/25	epm user 8/6/25		...
 Actual vs Plan		8/6/25	epm user 8/6/25		...
 Ad Hoc Revenue Analysis		8/6/25	epm user 8/6/25		...

To open a form in Oracle Smart View for Office, see [Opening Forms and Ad Hoc Grids from Web Applications](#) in *Smart View for Office User's Guide*.

Exporting Data to Microsoft Excel

By exporting data from a form to Microsoft Excel, you can explore "what-if" scenarios in Excel before copying and pasting values back to your business process.

About exporting data:

- Your business process doesn't export these details to Excel: Supporting Detail, cell comments, numerical formatting, the application name, user, form folder, attributes, currency tags, or percentages.
- Full decimal places are exported for numerical values, but scaling isn't applied to preserve accuracy. When you view the exported data in Oracle Smart View for Office, data displays like it does in the business process form.
- Member aliases display if your administrator sets the form to display them.
- Values pasted back to your business process from Excel must be unformatted data.

To export data from forms to Microsoft Excel:

1. Open a form.
2. Click **Actions**, then **Spreadsheet Export**, and then **Export**.
3. Either open or save the file.

Use standard Excel procedures to make and save your changes.

Working in Forms 1.0

Administrators set who can view and change which data. You can enter or change data only in cells that you have Write permission to (cells with a white background).

To select members in a 1.0 version of a form, use the member selector. See Using the Member Selector in *Administering FreeForm*.

Selecting Different Data to Work With

Under the form name, a bar displays boxes that show which member data you're working with. This top bar consists of the following parts:

- The POV axis is displayed as black text. Your administrator selects these members for the form; you can't select different members for this dimension.
- The Page axis is displayed as blue hyperlinks. Click the hyperlink to select different members to work with.
- Dynamic POVs are displayed as blue hyperlinks. Click the hyperlink to select different members to work with.
- The Global POV bar is displayed as a bar at the top of the dashboard, if it's enabled. If you change a page in the global POV bar and then click **GO**, the page changes for all objects that are based on forms.

When you make a change to the POV, the change is reflected within seconds in any of your parallel sessions without having to log out of the web interface. For example, if you change the POV in a form in the web interface, the change is reflected for your session in Oracle Smart View for Office, in a REST API call, or in Reports. This ensures that any changes you make to the POV are reflected in all of your open sessions.

- If you make a change to the POV in any session other than the web interface, you must re-open the form in the web interface to see the updated member in the POV.
- If you are using vertical tabs in the web interface, if you make a change to the POV in a form on one tab, the change is reflected right away in a form on another vertical tab.

Understanding Form Colors

Background colors in cells indicate the following states:

- White means that you can enter data in these cells.
- Yellow cells indicate that you have changed values but haven't yet saved them.
- Grayish blue cells indicate that you can see, but not change, their values. They are read-only.
- Tan cells are locked.

See [Locking Cells](#).

- Teal cells have Supporting Detail.

See [Working with Supporting Detail](#).

Viewing Server Status on Forms

A status indicator on forms displays icons to indicate "busy" and "idle" server activity. Any client-server action performed in a form grid (for example, clicking a button to fetch or save data, executing a rule, launching a popup, and so on) will cause the status to change.



Note:

The status indicator doesn't display on forms that are embedded in a dashboard.

Balance Sheet - Forecast

Scenario: Forecast Version: Working Entry: Total Department

	FY22		FY23	
	Q3	Q4	Q1	Q2
Current Assets	530,336,084.588	566,056,929	484,591,229	496,165,173
Fixed Assets	61,173,491	69,330,147	53,978,601	50,523,450
Other Assets Total	223,088,151	223,088,151	223,088,151	223,088,151
Total Assets	815,197,727	848,474,228	781,657,981	769,776,774
Current Liabilities	331,457,734	336,851,975	330,893,673	334,091,217
Long Term Liabilities	43,770	43,770	43,770	43,770
Total Owners Equity	483,656,224	511,578,483	430,720,638	435,641,787
Total Liabilities and Owners Equity	815,197,727	848,474,228	781,657,981	769,776,774

Actions Save Refresh

If the form's status is active, the "busy" icon is displayed, otherwise the "idle" icon is displayed.

- : Idle Status
- : Busy Status

Navigating Quickly in a Form

How you navigate depends on whether you just clicked into a cell or are editing cell data. For example, when you are editing data in a cell, you must click Tab to move to the next cell.

You can quickly move around a form with these shortcut keys:

Table 4-1 Keyboard Shortcuts

Key or Key Combination	Result
Tab	Moves to the next cell in the row. When focus is on the last cell of a row, Tab moves to the next row.
Enter	Moves to the next cell in the column.
Shift+Enter	Moves to the previous cell in the column.
Shift+Tab	Moves to the previous cell in the row.
Up Arrow, Down Arrow	Moves up or down to the previous or next row.
Right Arrow, Left Arrow	While editing in a cell, moves forward and backward in the cell data. If you are navigating the grid cells without editing, moves to the next cell or previous cell in the row.
Ctrl+Home	Moves to the first cell in the form.
Ctrl+End	Moves to the last cell in the form.
Ctrl+Left Arrow	Moves to the first cell in the current row.
Ctrl+Right Arrow	Moves to the last cell in the current row.
Shift+End	Moves to the last cell of the first row.
Ctrl+A	Selects all cells.
Shift+Space	Selects the row.
Ctrl+Space	Selects the column.
Esc	Discards the current changes in the cell, restoring the previous state.



Note:

These shortcuts are available only if you're accessing forms from the desktop.

Basics of Working With Data

Related Topics

- [About Entering Data](#)
This topic gives you some tips on entering and saving data.
- [Dynamically Setting User Variables](#)
If your administrator set up a form with at least one user variable and enabled dynamic user variables, then you can select and change user variable values directly in the form.
- [Using Data with Forms](#)
When you're in a form, you can make the data more meaningful in many ways.
- [More Ways to Manipulate Values](#)
Here are some easy ways to manipulate data:
- [Entering Data for Suppressed or Excluded Members](#)
In forms, users can directly select a member from the drop-down list on the row dimension in the form, and then enter and save data for that member.
- [Getting the Latest Data](#)

- [About Calculating Data](#)
Values are automatically totaled as you enter data. Here are other ways to calculate data:
- [How Totals are Calculated](#)
Here's how values are subtotaled and totalled:
- [Reviewing Data](#)
You can review and analyze data in many ways.
- [Personalizing How Data Displays](#)
You can customize how data displays in a form, for example, with formatting and hiding rows and columns having no data.
- [Printing Data](#)
You can print data in forms as PDF files and customize its format if Adobe Acrobat Reader 5.0 is installed on your computer.

About Entering Data

This topic gives you some tips on entering and saving data.

- Your administrator can set up a form so that when you move out of a cell, your changes are automatically saved, with no prompt or message. Cell values are totaled and the affected cells are displayed with a green background.
- In forms with drop-down member selectors enabled on row dimensions, you can directly choose a member from the drop-down list and enter data for that member. Depending on how the drop-down member selector was configured, you may be able to add data to member rows that would have otherwise been suppressed.
- If the structure of the form hasn't changed since you started working in it, when you click **Save**, your changed or new data is instantly saved.
- To revert to the data on the form before you changed it, click **Refresh**.
- If you're using a non-Redwood Experience theme on your desktop, right-clicking in forms (rows, columns, POV, or cells), displays the same options as the **Actions** menu. If Redwood Experience is enabled, right-clicking in forms displays more forms-specific options than the **Actions** menu.



Note:

Use the business process interface to navigate instead of your browser's interface. Using Refresh, Forward, and Back in your browser can cause instability. If this happens, log off and then log back on.

Videos

Your Goal

Learn how to enter data and save it.

Watch This Video



[Entering and Saving Data in Cloud EPM](#)

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal

Learn how to enter data within the FreeForm business process.

Learn How



Entering Different Kinds of Data

You can enter data in many ways, depending on how your administrator set up the form:

- Enter data directly in the cell.
- If a data cell displays the Down Arrow, you select a value from a list, called a *Smart List*. You can skip to a value by typing its first one or two letters. For example, in a list of months, skip to September by typing *s*.
- Members that are set up as percentages display with a percent sign (%) in the cell. You can enter a percentage value as a decimal or as a percentage, such as 60%.
- When you click into a cell that is set up for text data, a box displays. Enter your text into the box. When you enter text in cells, don't use angle brackets (< >). The maximum length of text data you can enter is 4000 characters.
- When you save data, business rules are run that your administrator set up to launch when the form is saved.

Entering Data Quickly Using Commands

You can use these shortcuts in forms. Enter the keys or symbols, and then press Enter.

Table 4-2 Commands for Quickly Entering Data

Keys or Symbol	Result	Example
K	Enters the value in thousands.	Enter 5K for 5,000.
M	Enters the value in millions.	Enter 5M for 5,000,000.
Add or +	Adds a number to the cell value.	If the cell value is 100, entering Add10 after 100 results in 110.
Sub or ~	Subtracts a number from the cell value.	If the cell value is 100, entering Sub10 after 100 results in 90.
Percent or per	Multiplies the cell value by the percentage you enter.	If the cell value is 100, entering per10 after 100 results in 10% of the current cell value, or 10.
Increase or inc	Increases the cell value by the percentage you enter.	If the cell value is 200, entering inc10 after 200 increases the cell value by 10% of 200 (20), to 220.
Decrease or dec	Decreases the cell value by the percentage you enter.	If the cell value is 200, entering dec10 after 200 decreases the cell value by 10% of 200 (20), to 180.
Power or pow	Changes the cell value to the number, added as an exponent.	If the cell value is 100, entering pow2 after 100 multiplies the cell value by an exponent of 2, to 10,000.
gr	Grows a cell by a percentage.	If the cell value is 200, entering gr50 after 200 increases the cell value by 100, to 300.




Note:

These shortcuts are available only if you're accessing forms from the desktop.

Searching in Forms

In forms, you can easily locate a member name or data value in a form by using the

Find icon . You can enter a partial name or value in the text box, and **Find** locates the first occurrence of the row, column, or data value. Click the forward or backward arrows to navigate to successive occurrences.

See also [Navigating Quickly in a Form](#). To find a specific form, see [Searching for Forms, Dashboards, and Infolets](#).

Selecting Cell Ranges

You can select and work with multiple cells if the selection is rectangular and contiguous. To select a cell range in an ad hoc grid, click in the range's upper-left cell, click Shift, and then click in the range's lower-right cell. To select a cell range in a form, hover over the cell until the icon changes; then you can extend the range.

To select a row or column, click its heading. After you select a group of cells, you can copy and paste them or adjust the data values.

See:

- [Copying and Pasting Data](#)
- [Adjusting and Spreading Data](#)

Copying and Pasting Data

You can copy data within a form, from one form to another, or from another product, such as Microsoft Excel.

When you're in a form, copy and paste data by selecting the data, and then clicking **Data**, and then an icon under **Edit**.

See also [Copying and Pasting Data Between Microsoft Excel and Your Business Process Forms](#).

About copying and pasting data:

- When you copy within or among forms, the business process copies and pastes the cells' stored values, not the values that display based on the precision setting.
- When pasting data to time periods, your business process applies the spreading rules for each cell in succession, starting from left to right and from top to bottom. The resulting data from a paste operation may not match the original copied data. Understand how values are spread before you paste them into time periods.

See [How Spreading Data Works](#).

- Copying and pasting data from a text editor (for example, TextPad, Notepad, or WordPad) fails if the data is space-delimited. Use tab-delimited values instead.

Dynamically Setting User Variables

If your administrator set up a form with at least one user variable and enabled dynamic user variables, then you can select and change user variable values directly in the form.

For example, for a variable called Department, you can select Sales members to plan sales expenses and then select Marketing members to plan marketing expenses. You can also set values for user variables in user preferences.

See [Setting User Variables](#).

If the form was defined with the **Use Context** option, then user variables can be used in the POV. With this setting, the value of the user variable changes dynamically based on the context of the form.



Note:

You must select a value for user variables before working in the form.

To dynamically change values for user variables:

1. Click the text that displays the user variable.
The variable and its currently selected value display under the POV.
2. Select the members that you want, and then click **OK**.
The form displays the selected members.

Using Data with Forms

When you're in a form, you can make the data more meaningful in many ways.

- [Explore Form Functionality](#)
- [View Form Properties](#)
- [Focus the Data](#)
- [Enter Data for Suppressed or Excluded Members](#)
- [Emphasize Data with Formatting](#)
- [Adjust and Spread Data](#)
- [Add Comments and Attachments and View History](#)
- [Sort and Filter Data](#)
- [View Supporting Detail](#)


Explore Form Functionality

Explore ways to access, calculate, manipulate, create, analyze, or comment on data. Click **Actions**, and then select from the following options:



- **Analyze:** Perform ad hoc analysis on a form.
See [Get Started Performing Ad Hoc](#).

- **New Ad Hoc Grid:** Create an ad hoc grid.
See [Creating an Ad Hoc Grid](#).
- **Show Reasons for Read-Only Cells:** Learn why you can't change data in some cells.
See [Why Cells May Be Read-Only](#).
- **Business Rules:** View the business rules that are used in a form and launch them.
See [Using Business Rules](#).
- **Smart Push Details:** Analyze data coming from different cubes.
See [Pushing Data for Reporting](#).
- **Grid Validation Messages:** Check how the data conforms to rules that an administrator set up.
See [Resolving Data Validation Errors](#).
- **Clear Formatting:** Clear the formatting that you set.
See [Emphasizing Data with Formatting](#).
- **Spreadsheet Export:** To explore "what-if" scenarios in Excel before copying and pasting values back to your business process, click **Actions**, and then select **Spreadsheet Export**.
See [Exporting Data to Microsoft Excel](#). See also [More Ways to Manipulate Values](#).
- **Open in Smart View:** Work with a form in Oracle Smart View for Office. See [Opening Forms and Ad Hoc Grids from Web Applications in Smart View for Office User's Guide 23.100](#).

View Form Properties

View the properties of a form by clicking .

Focus the Data

Explore what you can do with ad hoc grids. In a form, click , and then click .



See [Using Ad Hoc for Data Entry and Analysis](#).

Enter Data for Suppressed or Excluded Members

Enter data for members that are not included in or not immediately visible on the form.



See [Entering Data for Suppressed or Excluded Members](#).

Emphasize Data with Formatting

Improve the presentation quality of the data. Click , and then click  to explore options for setting the font, font size, font color, underscore, and background color.

See [Emphasizing Data with Formatting](#).



Adjust and Spread Data




Change values by a specific amount. Select the cell or cells. Click , then , and then click any of the following:

- **Adjust** to increase or decrease the cell data by a value or percentage.
- **Spread** to specify an amount or percentage by which to increase or decrease values across multiple dimensions, based on the existing values in the target cells. You can select a **Proportional**, **Evenly Split**, or **Fill** spread pattern.
To use **Spread**, your administrator must enable **Grid Spread** as a form property.
See [Adjusting and Spreading Data](#).
- **Allocate**. Only administrators who are assigned the Allocate role can use this powerful feature. Also, **Allocate** must be enabled as a form property.
See [Spreading Values Using Allocations](#).
- **Lock** to temporarily lock cells while you calculate and fill in other values. To unlock the cells, click **Lock** again.
See [Locking Cells](#).

Add Comments and Attachments and View History


Explain assumptions behind the data or, if enabled, view change history. Click a cell, then

, and then . Under **Details**, click:

-  to attach an external file.
See [Working with Attachments](#).
-  to add a comment.
See [About Cell Comments](#).
-  if your administrator enabled auditing for Data, see who changed cell values and when they did so.
See [Seeing What's Changed](#).

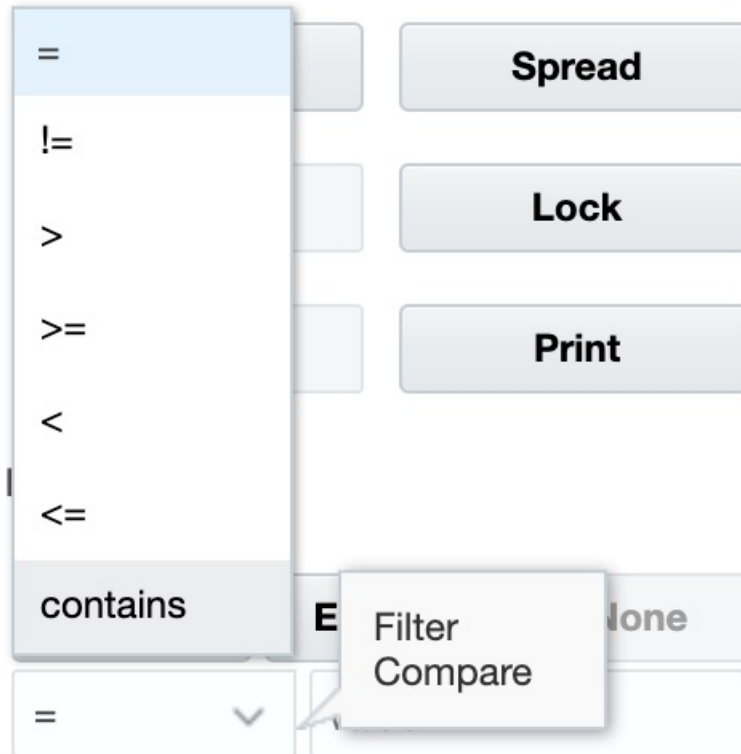
Sort and Filter Data

Simplify the data presentation. Control which rows or columns are displayed (or hidden) by

clicking , then , and then **Keep** or **Exclude** under **Filter**.



To limit the view to certain comparison results, click the **Filter Compare** menu to choose an operator and then specify a value for comparison in the **value** field.

Action



You can also sort the values in a row or column by ascending or descending order by selecting the row or column, and then clicking an arrow under **Sort**.

View Supporting Detail

Build logic into a data value. Click a cell, then , and then , and then **Supporting Detail**.

See [About Using Supporting Detail](#).

More Ways to Manipulate Values

Here are some easy ways to manipulate data:

- Spread values from a parent cell to its children. For example, you can enter "300" in Q1 (the parent), and 300 is spread to its children: Jan, Feb, and March, automatically filling "100" into each of those months.
To learn more, see [How Spreading Data Works](#).
- Enter an operator (+, -, *, /, or %) and then a number. For example, if a cell's initial value is 100, you can enter *5, which changes the value to 500.
See also [Entering Data Quickly Using Commands](#) and [Performing What If Analysis](#).

Entering Data for Suppressed or Excluded Members

In forms, users can directly select a member from the drop-down list on the row dimension in the form, and then enter and save data for that member.


Depending on how your Service Administrator or Form Designer configured the drop-down member selectors, you may add data to member rows that would have otherwise been suppressed or excluded.

See [Guidelines for Entering Data for Suppressed or Excluded Members](#) for additional information.

To access a drop-down member selector in a form and add members and data:

1. Open a form and locate a drop-down member selector by hovering over the row dimensions.

If a dimension member contains a drop-down member selector, an arrow appears in the cell; for example:

<input type="checkbox"/> Total Office Expenses	2,236,991
7640: Airfare 	7,972

2. Click the down arrow in the cell to launch the member selector, then scroll or search for the member to add.

Here's an example of the member selector after clicking the down arrow in the 7645: Airfare cell. You can enter a member name in the **Search** box or scroll through the list to locate the member to add. For this example, we'll choose 7620: Legal Services.

Scenario Plan	Version Working	Entity HR and Administra		
			7110: Advertising	
			Total Office Expenses	
			7640: Airfare	
			7650: Car Rental	
			7660: Shipping	
			7670: Accommodation	
			7690: Meals	
			7699: Miscellaneous Travel Expenses	
			Total T&E Expenses	338,832
			7730: Bad Debt	7,973
			Other Expenses	7,973
			Total Operating Expenses	2,583,796
			7310: Existing Depreciation	432,877
			Total Depreciation & Amortization	432,877
			OpEx before Allocations	3,016,673

Select Member ✕

Search

Name

- 7530: Equipment Expense
- Total Office Expenses
- 7610: Accounting and Tax Services
- 7615: Secretarial Services
- 7620: Legal Services
- 7625: Technical Services
- Total Facility Services Expenses

Click in editable cells to add or change data. For example, the 7620: Legal Services data cell shown here can be edited:

Total Office Expenses	2,236,991
7620: Legal Services	7,972.08
7650: Car Rental	879

- In the row you have just added, modify or add data in the editable cells, as you require, and then click **Save**.

The row member you selected and the data you entered are added to the form.

In this example, the 7620: Legal Services member and the data that was entered (5,000) is added to the form.

Scenario Plan	Version Working	Entity HR and Administration Management	Year FY17
			YearTotal
		7110: Advertising	2,236,991
		Total Office Expenses	2,236,991
		7620: Legal Services	5,000
		Total Facility Services Expenses	5,000
		7640: Airfare	7,972
		7650: Car Rental	879
		7660: Shipping	326,660
		7670: Accommodation	2,335
		7690: Meals	521
		7699: Miscellaneous Travel Expenses	466
		Total T&E Expenses	338,832
		Total Operating Expenses	2,580,823
		7310: Existing Depreciation	432,877
		Total Depreciation & Amortization	432,877
		OpEx before Allocations	3,013,700

- Repeat this procedure to add other members and data to the form.

Guidelines for Entering Data for Suppressed or Excluded Members

When using the drop-down member selector, keep in mind the following:

- The drop-down content (list of members) is controlled by the form definition for the corresponding segment.
- Selections are not retained. If you perform a Refresh after selecting a member from the drop-down but before saving, the selection is lost and the form returns to its original state.
- The drop-down selection will be lost on saving data. Modifying data cells and saving data will not retain modified drop-down selections.

The drop-down member selector on row dimensions requires configuration in the Form Designer in the web interface. The Service Administrator or form designer specifies the drop-down selectors as segment properties for particular row dimensions. For example, suppose there are two dimensions placed on row axes, Entities and Line item; the member selector drop-down may be enabled for the Entity dimension members, for the Line item dimension members, or for both. Configuration is described in the administration guides for your business process.

Getting the Latest Data

To ensure that you are working with the latest data, refresh the data by clicking **Refresh**.

About Calculating Data

Values are automatically totaled as you enter data. Here are other ways to calculate data:

- Launch a business rule.
See [Using Business Rules](#).
- Use a formula that was created in your business process.
- Use a formula that you created in Oracle Smart View for Office.
See [Using Your Own Excel Formulas in the Business Process](#).
- Use the **Adjust** or **Spread** feature.
See [Adjusting and Spreading Data](#).
- Use Supporting Detail.
See [About Using Supporting Detail](#) and [Working with Supporting Detail](#).

How Totals are Calculated

Here's how values are subtotaled and totalled:

- Subtotals are calculated based on factors that your administrator set, such as the member hierarchies, member properties, and the logic of the hierarchy.
- To recalculate subtotals, click **Save**. If the Calculate Form rule is selected to launch during **Save**, all subtotals are recalculated based on their members' aggregation properties and the form's design.
- Saving data calculates members that are set to dynamically calculate, excluding the bottom-most (level-0) members.
- Calculations are based on the stored (not the displayed) values. Displayed values might be based on scaling or precision settings.
- Only displayed members are calculated. If you have read but not write permission to some members, then subtotals correctly include their values even if they are read-only.

See also [Adjusting Cell Values](#) and [How Spreading Data Works](#).

Reviewing Data

You can review and analyze data in many ways.

For example:

- In ad hoc grids.
See [Using Ad Hoc for Data Entry and Analysis](#).
- In dashboards.
See [Reviewing Data](#).
- In reports.
See [Working with Reports](#).

Personalizing How Data Displays

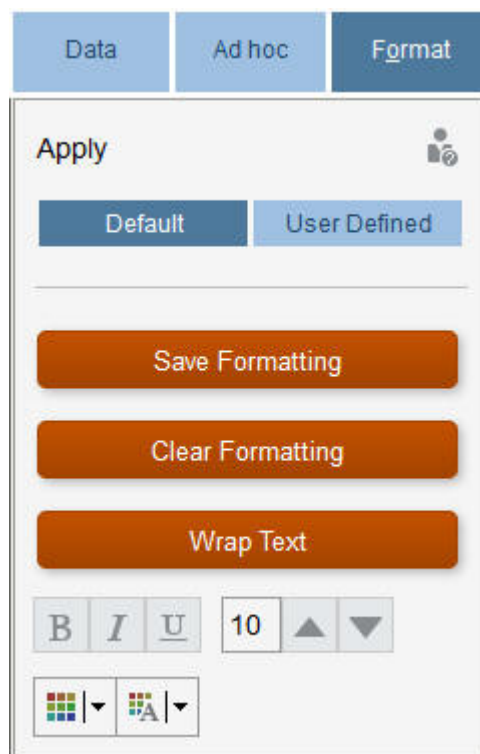
You can customize how data displays in a form, for example, with formatting and hiding rows and columns having no data.

See the next topics.

Emphasizing Data with Formatting

In forms and ad hoc grids, a variety of formatting options help you emphasize certain data.

For example, you can increase or decrease the font size and set the font color and background. You can even select a custom color. You can save or clear the formatting that you set. And in text cells, you can wrap the text.



About formatting:

- **Default:** Formatting that your business process applies to indicate a state (for example, that the cell has **Supporting Detail**).
- **User Defined:** Formatting that you've applied.



Note:

Where formatting styles conflict, the default formatting takes precedence. For example, you might format a cell and then change its value. The default formatting for a changed but not-yet-saved value overrides the formatting that you applied to that cell.

Hiding Rows or Columns That Have No Data or Zeros

To simplify the data in a form, you can hide rows that have no data or contain zeros.

To hide rows that have no data or contain zeros:

1. Click **Actions**, and then **Filter**.
2. Click an option:
 - **Hide rows with no data:** To toggle between hiding and showing rows that have no data (displayed as #MISSING or blank, depending on how your administrator set this property). This option is not displayed if your administrator has set the form's property to Suppress Missing Data.
 - **Hide rows with zeros:** To toggle between hiding and showing rows that have zeros for values.
 - **Hide rows with zeros and no data:** To toggle between hiding and showing rows that have either no data or zeros, or both.

To hide columns that have no data or contain zeros, follow these steps, but select columns instead of rows.

About Cells That Have No Data

#MISSING in a cell indicates that the cell contains no data, whereas zero in a cell is a data value.

#MISSING decreases the database size and improves performance. To improve performance, your administrator can set cells having no data as #MISSING.

See [Writing #MISSING Values](#).

Printing Data

You can print data in forms as PDF files and customize its format if Adobe Acrobat Reader 5.0 is installed on your computer.

You can also export formatted reports to Oracle Smart View for Office.

See [Exporting Formatted Reports to Excel](#).

To print a form's data to a PDF file:

1. With a form open, click the **Data** tab, and then **Print**.
2. Select the print options that you want.
3. Click **Print Preview**.

4. Click **Open with** to open the file in Adobe Acrobat Reader or click **Save** and name the file.

To revert to the printing options that you set in preferences, click **Restore Form Settings**.


More About Working With Data

Related Topics

- [Viewing Member Formulas](#)
Your administrator can set up member formulas to perform calculations on members.
- [Working with Business Process Data in Excel](#)
If you're familiar with working in Microsoft Excel, you may want to work with your business process data in Oracle Smart View for Office.
- [Drilling Through to Source Data](#)
Your administrator can load data from a source using Data Integration or the business process import and export functionality. You can drill through to view details of the data source.
- [Cell Icons](#)
Icons in a form's cell provide information. Here's what they mean.
- [Resolving Data Validation Errors](#)
Your administrator can set up data validation rules to ensure that data meets company guidelines.
- [Pushing Data for Reporting](#)
For meaningful and complete reporting, your administrator can set up forms so that you can analyze data coming from different cubes using **Smart Push Details**.
- [About Cell Comments](#)
To explain data or provide background, you can add comments to a cell or to a range of cells across multiple dimensions.
- [Working with Attachments](#)
You can provide background information on data by attaching a file to a cell.
- [Searching for Forms, Dashboards, and Infolets](#)
You can easily search for specific forms, dashboards, and infolets from their listing page.
- [Why Cells May Be Read-Only](#)
Learn why you can't change data in some cells.
- [Seeing What's Changed](#)
If your administrator has enabled audit trails for certain items, you can see their history of changes.

Viewing Member Formulas

Your administrator can set up member formulas to perform calculations on members.

To view a member's formula, click the formula icon .


Working with Business Process Data in Excel

If you're familiar with working in Microsoft Excel, you may want to work with your business process data in Oracle Smart View for Office.

Smart View provides a common Microsoft Office interface for your business process. Using Smart View, you can view, import, manipulate, distribute, and share data in Microsoft Word and PowerPoint.

To learn more, see *Oracle Smart View for Office User's Guide*.

To install Smart View:

1. Click  on the top right of the Home page.
2. Under **Settings and Actions**, click **Downloads**.
3. Under **Smart View**, click **Download from Oracle Technology Network**, and then follow the prompts.

Using Your Own Excel Formulas in the Business Process

In Oracle Smart View for Office ad hoc analysis, you can create your own Excel formulas and members that calculate instantly without affecting other data. You can then open this *Smart Form* in your business process and execute the calculations that you created in Smart View.

For example, say you're analyzing business process data in Smart View, which is the Microsoft Office interface to your business process. You want to calculate the average profit margin for four products. You can add a row called "Average Profit Margin" to the grid, and then create a formula on the four rows listing the products' profit margins. Select the four rows. Then, in the new "Average Profit Margin" row, add the Excel formula `=AVERAGE(D5:D8)`. The average profit margin is instantly displayed in the new row, but the new row is saved only in this Smart Form, and not the rest of the business process.

To make this customized ad hoc grid available in your business process, when you save it, select the option **Save as a Smart Form**. Then you can open and use this customized Smart Form, including the rows, columns, and calculations that you added, in your business process.

See [Opening Forms](#).

To learn more, see *Oracle Smart View for Office User's Guide*.

Videos

Your Goal	Watch This Video
Learn about calculating data using Smart Forms.	 Adding Excel Formulas in Cloud EPM

About Smart View Formatting in Web Forms

Depending on how your administrator set up the form, a form may display the cell formatting that you saved in Oracle Smart View for Office.

Microsoft Excel formatting is supported in Smart View and your business process except for:

- Your business process supports Excel's font styles except for underline and alignment.
- Your business process supports Excel's borders except for solid borders.
- Smart View supports Excel's cell formatting, including many of Excel's number and date formatting. Your business process doesn't support Excel's numbers and dates formatting.
- Your business process supports Excel's row formatting except for Excel's read-only, column width, or row height formatting.

See the *Oracle Smart View for Office User's Guide*.

Copying and Pasting Data Between Microsoft Excel and Your Business Process Forms

If you're accessing your business process from a desktop, you can copy and paste data between Microsoft Excel and forms.



Note:

This functionality is available on desktops only, not on mobile devices.

To copy and paste data from Microsoft Excel to your business process forms:

1. In Microsoft Excel, highlight the data in a single cell or a range of cells, and then press **Ctrl+C** to copy the data to the clipboard.
2. Select the target cell or cells in the business process form, and then press **Ctrl+V**.
3. When the Clipboard helper displays, press **Ctrl+V** again. The data is pasted to the Clipboard helper.
4. Click **Paste** to paste the data into the business process form.



Note:

Data that you copy and paste from Microsoft Excel to your business process reflects the formatting that's set up in Microsoft Excel. For example, if you set the number of decimal places in Microsoft Excel to zero, when you enter the value 459.123 in Microsoft Excel, the value displays as 459. If you copy this value into a business process form, then the value 459 is pasted.

Drilling Through to Source Data

Your administrator can load data from a source using Data Integration or the business process import and export functionality. You can drill through to view details of the data source.

To drill through to source data:

1. Open a form containing loaded source data.





The icon in the right top corner of a cell indicates that it has drill-through data.

2. From a cell that contains drill-down data, click **Actions**, and then **Drill Through**.
3. Click the link in the top left corner **Drill Through to Source**.
4. From the **Drill Through Summary**, you can drill through to the source.


Cell Icons

Icons in a form's cell provide information. Here's what they mean.


- : The cell has an attachment.


- : The cell has a member formula.

- : The cell has comments.

- : You can drill down on this cell.

See [Drilling Through to Source Data](#).

- : Select a value from a Smart List.

- : Click the Down Arrow by the member name to select and enter data for other members that are currently suppressed from displaying (either because they have no data and the administrator set the **Suppress Missing Data - Rows** option in form layout, or the administrator specifically excluded the other members during form definition).

Resolving Data Validation Errors

Your administrator can set up data validation rules to ensure that data meets company guidelines.

For example, your administrator can set:

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

If the data in a form doesn't meet the criteria in data validation rules, follow these steps to fix the errors.

To resolve data validation errors:

1. In a form with errors, hover your cursor over the cell (or on mobile devices, tap into) having a non-default colored background.

Your administrator typically calls your attention to cells having data validation rules by displaying them with a colored background. Pop-up text displays the cell intersection and the text `This cell contains Data Validation Messages`.

2. Click **Actions**, and then **Data Validation Messages**.
3. If there's more than one message, expand the list, and then click each hyperlink to go to the cell to be corrected.
4. Resolve each error based on the instructions in the data validation message.
5. When you've resolved all errors, save the form.
The cells' colored backgrounds and Data Validation Messages no longer display.

 **Tip:**

If your Page/POV doesn't include valid members, in the member selector you can clear the current members by clicking



and then **Clear Page Selections**. You can then select members from other dimensions that are included in the valid intersection definition.

Pushing Data for Reporting

For meaningful and complete reporting, your administrator can set up forms so that you can analyze data coming from different cubes using **Smart Push Details**.

For example, say you have expense data in one cube and revenue planning in another cube. Using **Smart Push Details**, you can quickly push the data from both cubes to a reporting cube. You can then analyze the consolidated data in the reporting cube. Smart Push includes data, comments, attachments, and Supporting Detail.

Your administrator can set up forms to automatically push data when you save the data in the form. Or, the administrator can set up the form so that you can initiate the Smart Push. If so, click **Actions**, then **Smart Push Details**, and then click the link in the Smart Push dialog box. If Smart Push is set to run on save, it doesn't display in Smart Push Details.

 **Note:**

- Smart Push always clears data in the reporting cube before it pushes data.
- In Forms 1.0, a message displays indicating Smart Push was executed on Save. No such message will display in Forms 2.0.

About Cell Comments

To explain data or provide background, you can add comments to a cell or to a range of cells across multiple dimensions.

To add and view comments, click a cell (or select a cell range), then the **Data** tab, and then

Comments 

. A small triangle in the upper right of a cell indicates that it has a comment.



You can also view comments in a PDF file or a printed report.



Note:

Forms 2.0 does not support adding comments or attachments to formula cells.


Working with Attachments

You can provide background information on data by attaching a file to a cell.

If your administrator selects the **Enable Cell-Level Document** property for the form, you can add attachments to cells.

Valid attachment file types are as follows:

- Image types permitted: .jpg, .gif, .png, .7z
- Non-image file types permitted: .csv, .xls, .xlsx, .txt, .zip, .jlf, .doc, .docx, .ppt, .pptx, .rtf, .pdf, .gdoc, .gsheet, .gslides, .msg


You could attach several documents to a cell, each with updated assumptions behind the cell's sales data. You cannot attach the same attachment to more than one cell. The attachment icon  indicates that a cell has an attachment.



Note:

In Forms 2.0, you can attach files with file sizes of up to a maximum of 20 MB to formula cells.

To add an attachment:

1. In the form, select the cell.
2. Click **Actions**, and then **Attachments** .
3. Browse to the file, and then click **Upload**.

To view the attachment, click its hyperlink.

Searching for Forms, Dashboards, and Infolets

You can easily search for specific forms, dashboards, and infolets from their listing page.

On the listing page for these artifacts, you can toggle between viewing these artifacts by a flat view or a tree view:



Then you can search for forms, dashboards, or infolets using the following search options:


- Use



for a keyword search.

 **Note:**

The flat view displays only the artifacts that meet the search criteria, not the folders that contain them. The tree (or hierarchical) view displays artifacts in the context of the folders that contain them.

- Use  to narrow the search by folder.

To search on another keyword, clear the search criteria by clicking **X** in the Search box, and then click



Why Cells May Be Read-Only

Learn why you can't change data in some cells.

Grayish blue cells in a data form indicate that you can see, but not change, their values. They are read-only.

To find out why a cell is read-only:

1. Refresh the grid to load the reasons why cells are read-only by clicking **Actions**, and then **Show Reasons for Read-Only Cells**.
2. Put the cursor in a read-only cell, right-click, and then select **View Reasons for Read-Only Cell**.

Reasons why a cell may be read-only:

Table 4-3 Reasons Why a Cell May Be Read-Only

Reason Given	Explanation
Not Found or No Access	<p>Either:</p> <ul style="list-style-type: none"> You don't have access to the data because the administrator has set the Apply Security property, but hasn't granted you Write access permissions to every dimension member of the data intersection. <i>Getting Started with Oracle Enterprise Performance Management Cloud for Administrators</i> describes how the administrator grants global roles, and your business process administration guides describe how the administrator assigns permissions to your business process artifacts. The cell is read-only because the member isn't found. For example, maybe the member isn't valid for the form's cube or maybe there's a typo in the member name.
Invalid Intersection	<p>The cell is invalid according to the valid intersection definition.</p> <p>See Understanding Valid Intersections in <i>Administering FreeForm</i>.</p>
Cell-Level Security	<p>The cell is secured according to a cell-level security definition.</p> <p>See Understanding Cell-Level Security in <i>Administering FreeForm</i>.</p>
Read Only Form	<p>The form is read-only.</p> <p>See About Assigning Permissions to Artifacts, Rules, and Folders in <i>Administering FreeForm</i>.</p>
Formula Cell	<p>The cell has a member formula.</p> <p>See Working with Member Formulas in <i>Administering FreeForm</i>.</p>
Supporting Detail Cell	<p>The cell has Supporting Detail.</p>
Account Source Cube	<p>The source cube of the account is not the same as the form's cube.</p>
Ad Hoc - Read Only User Role	<p>You're assigned the role Ad Hoc - Read Only User, so you can't change data in the form.</p>
Archive Mode	<p>The application's database is being archived, which temporarily prevents users from entering or changing data.</p>
Attribute, Dynamic Calc, or Label Only	<p>The cell is read-only for a variety of reasons, such as:</p> <ul style="list-style-type: none"> It's a calculated attribute value. It's dynamically calculated. Its storage type is Label Only. It's an upper-level cell in an Aggregate Storage cube.
Summary Time Period Ineligible For Spreading	<p>Some possible reasons why the data in a summary time period is read-only: The Period doesn't have members that it can spread to or they're locked, for example.</p>
Read Only Segment	<p>The Segment form property is set to read-only.</p>

Seeing What's Changed

If your administrator has enabled audit trails for certain items, you can see their history of changes.

For example, if your administrator enabled auditing for **Data**, you could see who changed cell values and when they did so.

To see the history of tracked changes:

1. Click



.

2. Click



.

3. Under **Details**, click



.

Working in Forms 2.0

Note:

To work in Forms 2.0, the **Forms Version** setting in application settings must be set to **Forms 2.0**. Forms 2.0 is available only if **Redwood Experience** is enabled.

See [About Forms Versions](#).

Opening a form from the **Data Entry** page, opens the form in the *runtime* environment.


To open forms, see [Opening Forms](#).

Administrators set who can view what data and who can change it. You can enter or change data only in cells that you have Write permission to (cells with a white background).

These topics contains helpful information as you work with 2.0 forms in the runtime environment:

- [Working with the Global Toolbar in Forms 2.0](#)
- [Working with the Quick Toolbar in Forms 2.0](#)
- [Working with POVs in Forms 2.0](#)
- [Opening the Member Selector in Forms 2.0](#)
- [Performing Calculations Without Having to Submit Your Changes \(Calc on the Fly\)](#)
- [Printing Data in Forms 2.0](#)





Videos


Your Goal	Watch This Video
Learn about working with data in Forms 2.0.	 Overview: Introduction to Forms 2.0 in Cloud EPM

Working with the Global Toolbar in Forms 2.0

The icons and menus at the top of each form enable you to view instructions or perform the following actions on the form:

Table 4-4 Form Global Toolbar

Object	Description
	Instructions: Displays instructions if they were added for a form.
	Refresh: Updates the data on the form.
	Search: Enter a keyword in the Find box and then click the Previous or Next arrow to find data within the form.
	Property Panel: Displays specific information for a form, like Data Validation messages. For ad hoc forms, the Property Panel displays properties for General , Ad Hoc User Options , and Layout .

 **Note:**

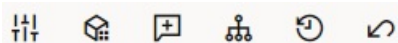
In the future, the **Property Panel** will be used to show other details such as cell formatting, and so on.

Table 4-4 (Cont.) Form Global Toolbar

Object	Description
Actions menu	<p>Displays the following form actions:</p> <ul style="list-style-type: none"> • Edit: Opens the form in the Form Designer. The Form Designer opens in a dynamic tab next to the current tab. You must have the correct permissions to edit forms. Any updates you make to the layout can be visualized after saving in the Forms Designer. When editing forms, you have the option to Save As, which saves the form with a new form name. • Rules & Smart Push: View the rules that are used in a form and launch them. See Using Business Rules. Analyze data coming from different cubes. See Pushing Data for Reporting. For Forms 2.0, there are usability improvements for rules: <ul style="list-style-type: none"> – Search functionality is included. – When the rule is executed, prompts can be entered in the right-hand side drawer. – Prompts for multiple rules can be entered in stations and launched all at once. • Analyze: Perform ad hoc analysis on a form. See Get Started Performing Ad Hoc. • Show Reasons for Read Only Cells: Learn why you can't change data in some cells. See Why Cells May Be Read-Only. • Open in Smart View: Work with a form in Oracle Smart View for Office. See Opening Forms and Ad Hoc Grids from Web Applications in <i>Smart View for Office User's Guide 23.100</i>. • New Ad Hoc Grid: Create an ad hoc grid. See Creating an Ad Hoc Grid. • Show/Hide Toolbar: Shows or hides the quick toolbar that is displayed below the form title.
Save	Saves the data in the form.








Working with the Quick Toolbar in Forms 2.0

In Forms 2.0, instead of using a context (right-click) menu, certain common actions have been placed in the quick toolbar for easier accessibility.



You can perform the following actions using the quick toolbar:

Table 4-5 Quick Toolbar

Icon	Description
	<p>Adjust: Increase or decrease the selected cell data by a positive or negative value, or a percentage value. See Adjusting and Spreading Data.</p>
	<p>Grid Spread: Specify an amount or percentage by which to increase or decrease values across multiple dimensions, based on the existing values in the target cells. You can select a Proportionally, Evenly, or Fill spread pattern. To use grid spread, your administrator must enable Grid Spread as a form property. See Spreading Values Using Grid Spread.</p>
	<p>Comment: Explain data or provide background, and attach external files. You can add comments and attachments to a cell or to a range of cells across multiple dimensions. Multiple comments can be posted for the same cell. The comments popup can be used to upload attachments. Posted comments and attachments can also be deleted.</p> <div style="border: 1px solid #0070c0; background-color: #e6f2ff; padding: 10px; margin-top: 10px;"> <p> Note:</p> <p>In Forms 2.0, you can attach files with file sizes of up to a maximum of 20 MB to formula cells.</p> </div> <p>See About Cell Comments and Working with Attachments.</p>
	<p>Line Item Details: Build logic into how a cell value is calculated. Line item details is an upgraded (alternative) functionality for supporting details:</p> <ul style="list-style-type: none"> • Line item details can be invoked from the context (right-click) menu or from the Quick Toolbar • Add child or siblings with provisioning to make arithmetic calculations (add, subtract, multiply, and so on) • Support only for rows (not for columns) <p>See About Using Line Item Details.</p>
	<p>Change History: Displays the history of the changes made to the cell data. See Seeing What's Changed.</p>
	<p>Undo: Cancel the last change you made.</p>

Working with POVs in Forms 2.0

About POVs


The information directly below the quick toolbar lets you select different data to work with. This is called the form's point of view (POV).

For a description of the POV bar, see [Selecting Different Data to Work With](#).

When a form contains a POV, changes to the POV are automatically applied. If you don't want to automatically apply changes, you can deselect auto-apply for the POV bar in the form's **POV Settings** menu. You can also hide dimension labels on the POV bar, and clear POV selections.

Changing POV Settings

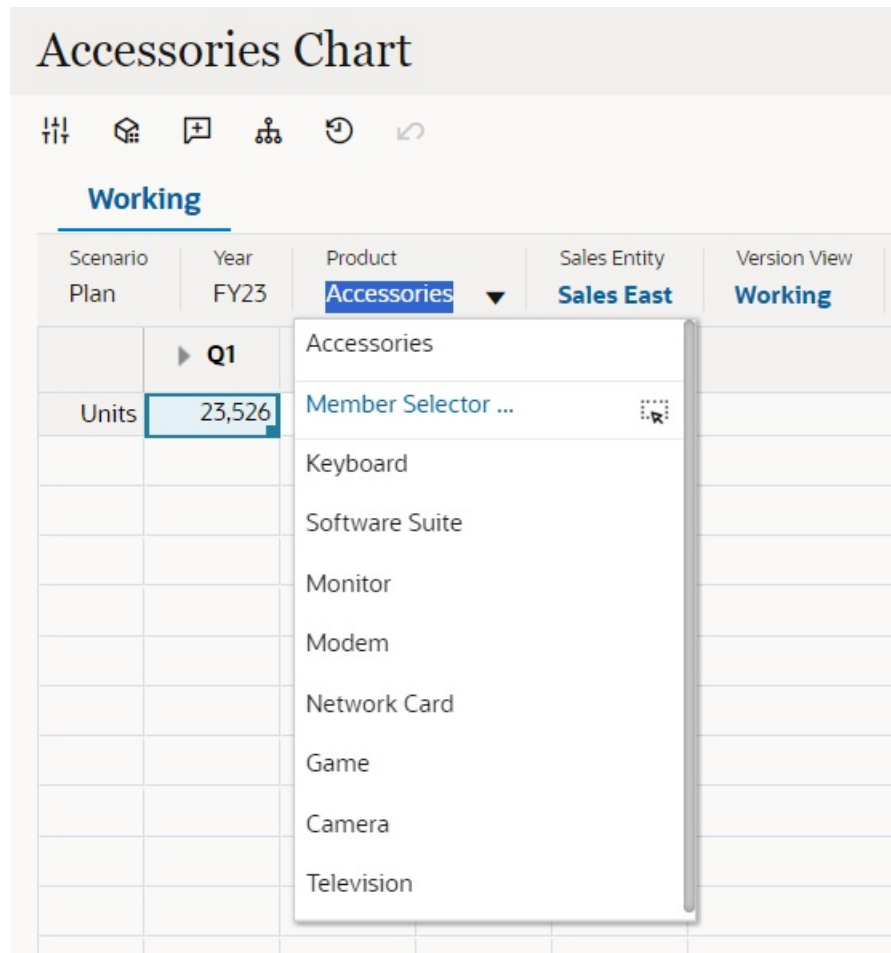
To access POV settings:

1. Click .
2. Select from the following options:
 - **Hide Dimension Labels:** Makes the form look more compact
 - **Auto-Apply:** Automatically refreshes the data grid every time POV values are changed
 - **Clear Selections**

Searching for POV Members in Forms 2.0

When working in Forms 2.0, you can easily find new POV members. To search, click a POV link. The search interface displays a list of the most recently used members from which you can choose.

Figure 4-1 Forms 2.0 POV Most Recently Used Members List




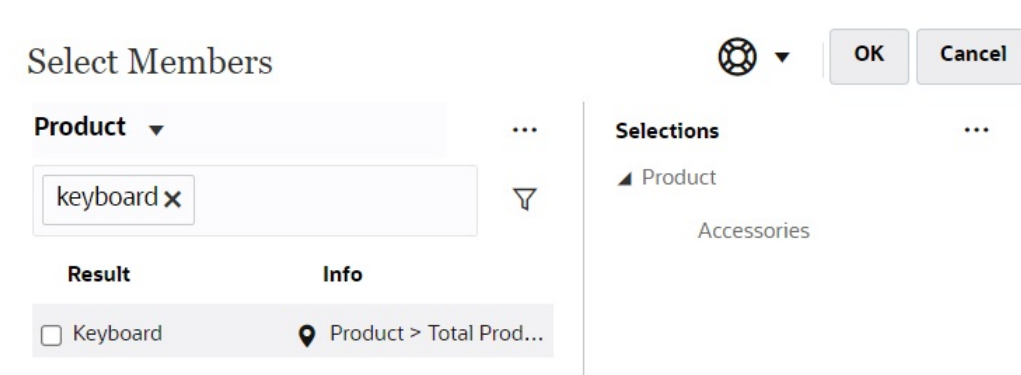
You also can search using the member selector. Click a POV link, then click the member selector icon  to launch the member selector. Members in the member selector are displayed as a hierarchy or you can type a member name in the **Search** box. If a member is located using the **Search** box, you'll see a result displayed under the Search box.

Figure 4-2 Forms 2.0 Select Members Search Results




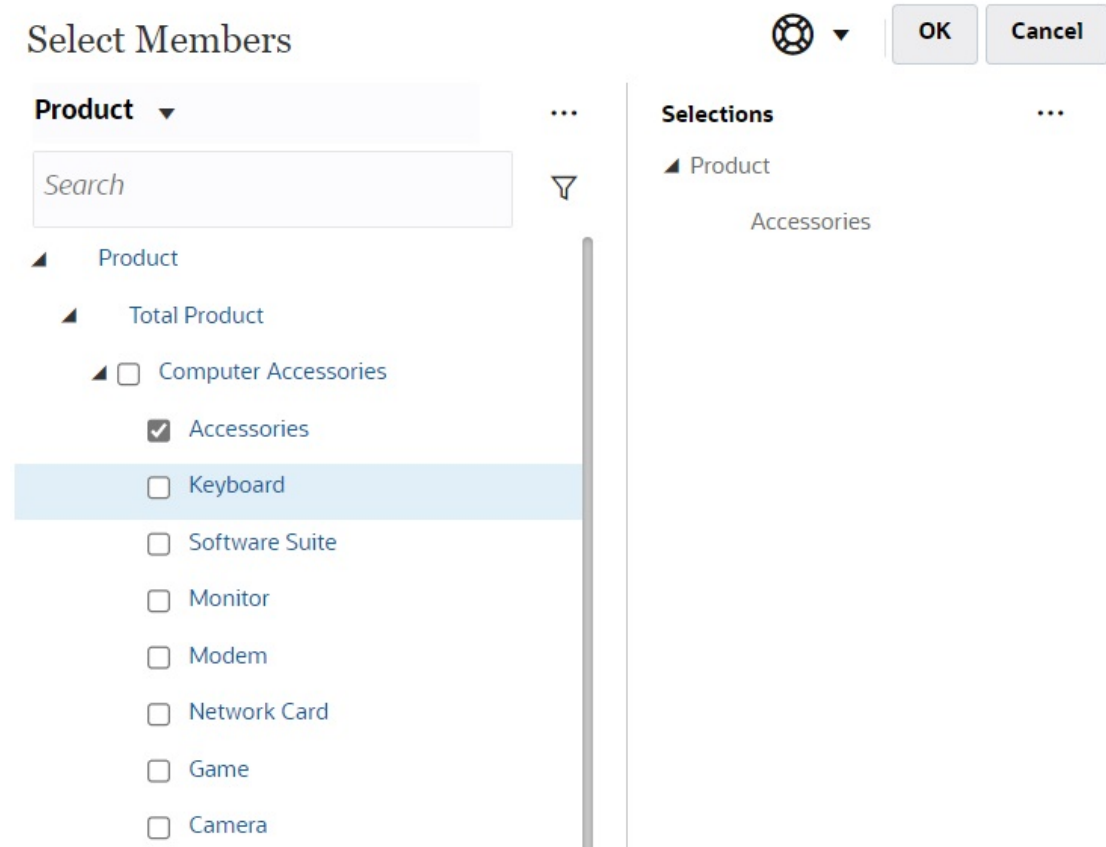
You can view where the member is located within the hierarchy by hovering over the result's **Info** column and clicking .

Figure 4-3 Forms 2.0 Select Members Search Results in Hierarchy

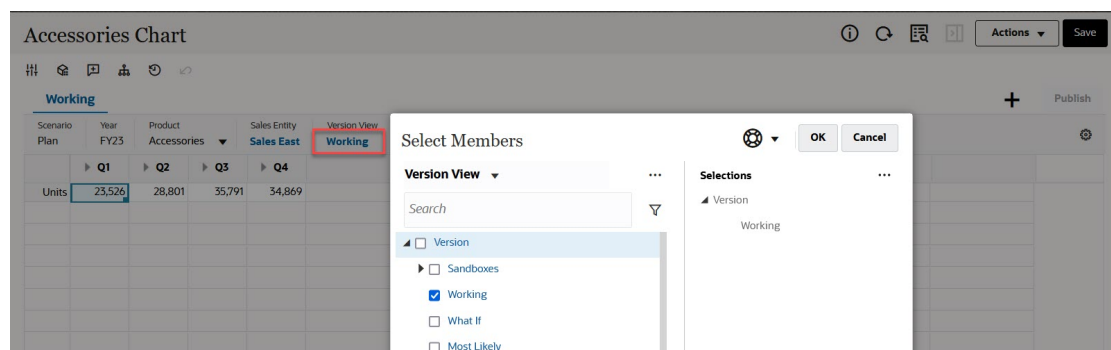


Opening the Member Selector in Forms 2.0

To select members in Forms 2.0, use the member selector.

To open the member selector from a Forms 2.0 form:

Click a member on the POV bar:



You can also click the Page drop-down list, and then select **Member Selector**:

The screenshot shows the 'Accessories Chart' interface. At the top, there are several icons for navigation and actions. Below the chart title, there is a 'Working' tab. The main area is a grid with columns for Scenario, Year, Product, Sales Entity, and Version View. The 'Product' column is currently set to 'Accessories'. A dropdown menu is open, showing a list of product categories: Accessories, Member Selector ..., Keyboard, Software Suite, Monitor, Modem, Network Card, Game, Camera, and Television. The 'Member Selector ...' option is highlighted with a red box, and a red box also highlights the dropdown arrow in the 'Product' column header.

Scenario	Year	Product	Sales Entity	Version View
Plan	FY23	Accessories	Sales East	Working
	▶ Q1	Accessories		
Units	23,526	Member Selector ...		
		Keyboard		
		Software Suite		
		Monitor		
		Modem		
		Network Card		
		Game		
		Camera		
		Television		

In a business rules run-time prompt, when the prompt is for members, click the **Member Selector** icon:



For more information about using the member selector, see [Using the Member Selector](#).

Performing Calculations Without Having to Submit Your Changes (Calc on the Fly)

Use calc on the fly to change data values and see calculated changes instantly without submitting the updated values.

When working with Forms 2.0, or during ad hoc analysis, you can perform calc on the fly without having to submit changes to the database and refresh. This capability saves you time and enables you to do multiple changes to the grid at once.

For Forms 2.0, this option is available if your administrator enabled this feature for the form. When this feature is enabled, in a 2.0 version of a form, when you hover over a cell with a member formula attached, you see the member formula associated with the cell and you can perform calc on the fly.

For ad hoc analysis, your administrator might have enabled this feature for you. Or, you can set a display preference for calc on the fly by selecting **Yes** for **Enable User Formulas in Ad Hoc** on the **Display** tab in **User Preferences**. When this setting is enabled, in an ad hoc grid, when you hover over a cell with a member formula attached, you see the member formula associated with the cell and you can perform calc on the fly.

To perform calc on the fly:

1. Open a 2.0 version of a form or an ad hoc grid, and hover over cells to see members with formulas attached, for both member formulas and consolidation operators. In this example, you can see the formula for **Sales for Jan**.

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	20	20	60
Sales East	30	30	30	90
Sales NorthEast	25	25	25	75
Sales Mid-Atlantic	20	20	20	60
Sales SouthEast	15	15	15	45
Sales South	12	12	12	36
Sales Central	10	10	10	30
Sales West	12	12	12	36
Sales	144	144	144	432

Row Sales Column BaseData Trips Jan member(403):
 410 +420 +421 +422 +423 +430 +440 +450 +66
 grid math:
 = EssSum(essMissing(1/0) , B4, B5, B6, B7, B8, B9, B10, B11)

There must be enter-able cells (level zero members) in the form or ad hoc grid in order for formulas to appear.

2. Perform calculations as needed, and then move the cursor from the cell:
 - Modify values that contribute to a calculated cell. The calculated cell value is updated.
 - Modify a calculated value. The cells that are on the form or ad hoc grid that contribute to the calculated cell are updated.
For formula spreading to work correctly, all source cells for the calculated value must be visible on the form or ad hoc grid.

A color change indicates a modified cell. Cells refresh immediately to display the newly calculated values, without submitting the changes to the database.

In this example of modifying values that contribute to a calculated cell, modify the value of **Sales West for Jan**:

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	20	20	60
Sales East	30	30	30	90
Sales NorthEast	25	25	25	75
Sales Mid-Atlantic	20	20	20	60
Sales SouthEast	15	15	15	45
Sales South	12	12	12	36
Sales Central	10	10	10	30
Sales West	15	12	12	36
Sales	144	144	144	432

When you press Tab, calc on the fly calculates updated values for **Sales** for **Jan**, **Q1** for **Sales West**, and **Q1** for **Sales**. Note the color change for the newly calculated values.

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	20	20	60
Sales East	30	30	30	90
Sales NorthEast	25	25	25	75
Sales Mid-Atlantic	20	20	20	60
Sales SouthEast	15	15	15	45
Sales South	12	12	12	36
Sales Central	10	10	10	30
Sales West	15	12	12	39
Sales	147	144	144	435

In this example of modifying a calculated value, modify the calculated value **Sales** for **Feb**:

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	20	20	60
Sales East	30	30	30	90
Sales NorthEast	25	25	25	75
Sales Mid-Atlantic	20	20	20	60
Sales SouthEast	15	15	15	45
Sales South	12	12	12	36
Sales Central	10	10	10	30
Sales West	12	12	12	36
Sales	144	288	144	432

When you press Tab, the values that contribute to the calculated cell are updated. Note the color change for the newly calculated values.

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	40	20	80
Sales East	30	60	30	120
Sales NorthEast	25	50	25	100
Sales Mid-Atlantic	20	40	20	80
Sales SouthEast	15	30	15	60
Sales South	12	24	12	48
Sales Central	10	20	10	40
Sales West	12	24	12	48
Sales	144	288	144	576

- When you've completed all of your modifications and are satisfied with the calculations, you can submit the modified values to the server, or you can discard your changes without submitting them.

You can also perform calc on the fly in Oracle Smart View for Office in 2.0 versions of forms or in ad hoc grids. See *Performing Calculations Without Having to Submit Your Changes* in *Working with Oracle Smart View for Office*.


Review the supported formula functions and operators. See Supported Functions and Operators for Calc on the Fly in *Working with Oracle Smart View for Office*.

Not all formula functions support calc on the fly. See Unsupported Functions and Formulas for Calc on the Fly in *Working with Oracle Smart View for Office*.

For additional considerations when performing calc on the fly, see Guidelines and Considerations in *Working with Oracle Smart View for Office*.

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
In this tutorial, you learn how to perform calc on the fly during ad hoc analysis using member formulas. You can work with calc on the fly either in the web or with Smart View.	 Performing Calc on the Fly in Cloud EPM

Printing Data in Forms 2.0

If you require printing, you can print data in forms 2.0 using the browser's print feature or the Excel Print feature in Oracle Smart View for Office.

To work with a form in Smart View, open a form, click **Actions**, and then select **Open in Smart View**.

See Opening Forms and Ad Hoc Grids from Web Applications in *Smart View for Office User's Guide*.

5

Working with Task Lists

Task lists help you organize, track, and prioritize your workload.

Administrators set up tasks to guide you through the planning process.

Task lists are a feature which guides users through the planning process by listing tasks, instructions, and end dates. For more information about working with task lists, see [Using Tasks with Task Lists](#).

Using Tasks with Task Lists

Task lists help you organize, track, and prioritize your workload.

Why Use Tasks?

Administrators set up tasks lists to guide you through the planning process. Task lists help you organize, track, and prioritize your workload.

For example, a task might help you complete forms or launch business rules. They can also launch a website or internal company page.

For information on creating task lists and tasks, see *Working with Task Lists* in *Administering FreeForm*.

Using Tasks to Plan

Get a high-level view of the status of your task lists on the **Tasks** page.


Click **Tasks**





on the Home page. The summary bar on the top of the **Tasks** page helps you track the number of tasks that are:

- Assigned to you
- Incomplete
- Due today, this week, or in the future
- Completed

Using tasks:

- To view task lists, click .
- To launch a task to complete its activities, click its name.
- To search for tasks or view a task list report, click the icons on the right.
- To mark a task as complete, on the task page, click the box by **Complete**.

- To control how your tasks are displayed, click  to view the lists in a flat list.
Click  to display the tasks in a tree, or hierarchical, view.

 **Note:**

If your administrator sets email alerts, you can receive email reminders about tasks that are approaching or are past their due date.

6

Using Dashboards to Work with Data

Related Topics

- [Understanding Dashboards](#)
Dashboards give you an overview to key information and let you enter, change, and save data.
- [About Dashboard Versions](#)
- [Viewing Dashboards](#)
- [Working with Dashboard 1.0 Dashboards](#)
- [Working with Dashboard 2.0 Dashboards](#)
Helpful information about working with Dashboard 2.0 dashboards in the runtime environment.
- [Working with the Dashboard 2.0 Global Toolbar](#)
- [Working with Dashboard 2.0 Components](#)
- [Working with Forms 2.0 Grids in Dashboard 2.0](#)
In Dashboard 2.0, you can work directly with data in forms grids if the underlying form is a Forms 2.0 form.
- [Drilling Through on Charts and Legends](#)
- [Working with POVs in Dashboard 2.0](#)
- [Opening the Member Selector in Dashboards 2.0](#)
To select members in Dashboards 2.0, use the member selector.
- [Working with Dashboard 2.0 Dashboards in Navigation Flows](#)
- [Working with Master Forms and Details in Dashboard 2.0 Components](#)
- [Support for Valid Intersections in Dashboard 2.0 Dashboards](#)
- [About Quick Analysis](#)

Understanding Dashboards

Dashboards give you an overview to key information and let you enter, change, and save data.

You can work with multiple forms or charts, enter data or change the data in one, and see the immediate effects in other forms, charts, and tiles in the dashboard. Change a driver in the grid and see its impact immediately in the chart.

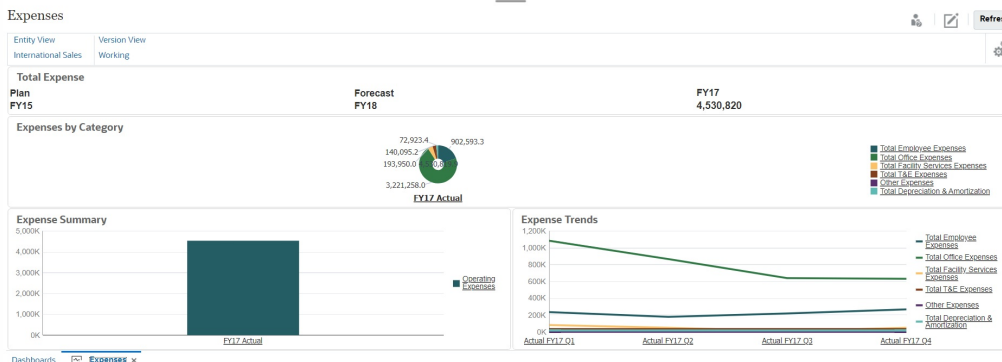
When you save data, it's saved in all the objects in a dashboard. Depending on the form's design, you can also drill down into more detail. You can select which members to work with and change chart types, for example. Hovering your mouse over chart elements highlights the element and displays a data label. Your administrator creates dashboards, but you have a lot of flexibility when using them. For example, for many chart types, you can customize the colors that represent the data.



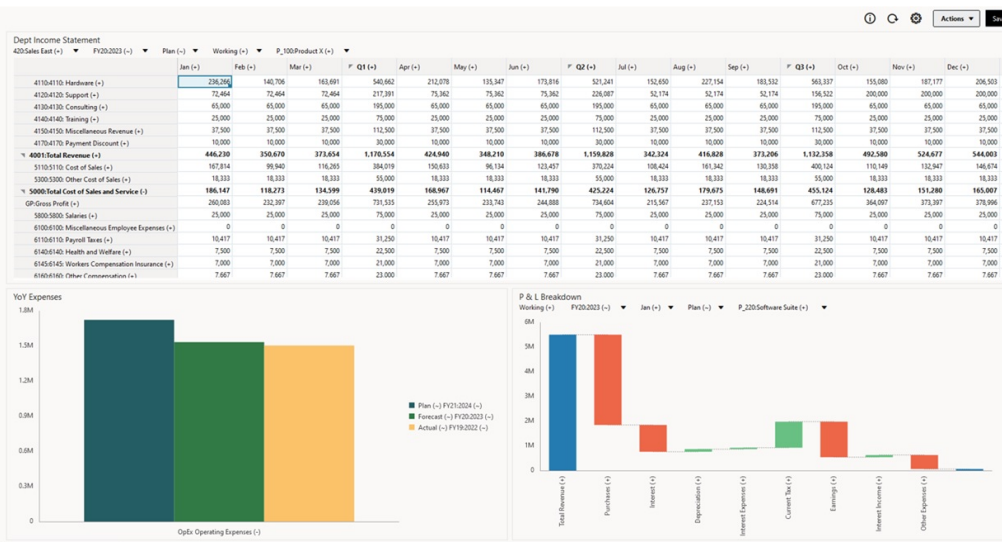
Note:

You can no longer mark a dashboard page as default.

Dashboard 1.0 Example



Dashboard 2.0 Example



About Dashboard Versions

Dashboards are currently available in two versions: Dashboard 1.0 and Dashboard 2.0. To help you differentiate between the dashboard versions on the **Dashboards** listing page, we've provided an icon in front of each dashboard:



: Dashboard 1.0



- : Dashboard 2.0

Both dashboard versions currently coexist in the same business process at the same time. Depending on which version you are viewing, the dashboards will look a little different and the user interface is also slightly different.

For information about creating dashboards, see *Creating and Managing Dashboards in Administering FreeForm*.

Dashboard 2.0 Runtime Features

Dashboard 2.0 Runtime supports:

- More chart types than Dashboard 1.0; for example, Waterfall, Pyramid, and Geomap and sub-chart types for Radar, Combination, and Gauge charts are all Dashboard 2.0 features
- Creating tables in dashboards with visual inline views of data, called Spark Charts
- Quick Analysis, which lets you add components to dashboards without having a prebuilt form

You create an ad hoc query by typing member names in the Search bar or using the Member Selector, and then you control the layout of the query in the Layout tab of the Properties panel.
- Working directly with data in form grids if the underlying form is a Forms 2.0 form
- If working with a Forms 2.0 form grid:
 - Global write-back option: global **Save** button with **Run on Save** rules
 - Individual form write-back option: local **Save** with **Run on Save** rules
 - In table charts, highlighting parent members to distinguish from leaf-level members
- Updated global and local POV bars that use the Oracle JET member selector
- An updated Maximize mode in charts and grids that are now consistent with one another
- Enhanced master forms and details that enable you to apply context from any grid
- Flexible layouts for all dashboards
- Valid intersections support for global and local POV bars
- The ability to **Edit** and **Edit without Data** from a custom menu outside of the Dashboards listing page
- Information icon for runtime dashboards and forms
- Opening and editing forms from within a runtime dashboard
- The ability to visualize different chart types in a runtime dashboard component
- Drill-through in single and multiple Pie and Doughnut charts
- Rationalized Actions, POV Settings, and Component menus
- The ability to switch over to Oracle Smart View for Office for all data operations; for example, Open, Edit, Create, Refresh, Data Submit, Page/POV Change
- A conversion utility to convert from Dashboard 1.0 to Dashboard 2.0; both batch conversions (at the folder level) and individual dashboard conversions are supported

- The ability to filter Dashboard 1.0 and Dashboard 2.0 dashboards on the listing page
- The ability to edit dashboards not only from the Dashboards listing and runtime pages, but also from custom navigation menus wherein dashboards are embedded.

Considerations for Dashboard 2.0

- 3D visualization is not supported in Dashboard 2.0. This affects the following Dashboard 2.0 chart types:
 - Area
 - Bar
 - Bubble
 - Column
 - Combination
 - Doughnut
 - Gauge
 - Line
 - Radar
 - ScatterDashboard 1.0 still supports 3D visualizations for these chart types.
- In a future update, Dashboard 2.0 will support Smart Push.

Viewing Dashboards

- [Viewing the Dashboards Page](#)
- [Features of the Dashboards Page](#)
- [Dashboards Page Actions Column](#)

Viewing the Dashboards Page

To view the **Dashboards** page:

1. On the Home page, click **Dashboards**.
2. To open a dashboard, click the dashboard's name.

This opens the dashboard in the *runtime* environment.

 **Note:**

If you've selected a Dashboard 2.0 dashboard and you see an `Error` during Dashboard 2.0 component initialization message, the dashboard has Forms 2.0 forms associated with it. You must ensure that Redwood Experience and Forms 2.0 are enabled before you can view the dashboard.

To enable Redwood Experience, click **Tools**, then **Appearance**, select **Enable Redwood Experience**, and then click **Save**.

To enable Forms 2.0, click **Application**, then **Settings**, and then under **Other Options**, find **Forms Versions**, select **Forms 2.0**, and then click **Save**.

Features of the Dashboards Page

On the **Dashboards** page:

- Folders are supported. The **Dashboards** page uses the same folder hierarchy as infolets and data entry forms and all artifacts and folders reside under a root folder called **Library**.

 **Note:**

Only administrators can add files (for example, dashboards, infolets, forms, reports, and so on) to the **Library** root folder.

- You can toggle between viewing dashboards by a flat view or a tree view:




- Dashboards are available in two versions. To help you differentiate between the dashboard versions on the **Dashboards** listing page, we've provided an icon in front of each dashboard:



– : Dashboard (1.0)



– : Dashboard 2.0

- The **Dashboards** page can be filtered by type. Click , and then select from the following filter options:

- **All Types** (default)
- **Dashboard 1.0**
- **Dashboard 2.0**

- To search for a specific dashboard, click



to search by keywords or  to narrow the search to specific library folders.

See [Searching for Forms, Dashboards, and Infolets](#).

Dashboards Page Actions Column

On the right side of the **Dashboards** page there is an **Actions** column. Clicking on the **•••** icon next to the dashboard or folder, displays the following actions:

- Folder Actions:
 - **Assign Permission:** Assigns access permissions to the folder. Folder permissions apply to all items within that folder, even to items that may not be visible in the list.
 - **Create Dashboard:** Creates a Dashboard 1.0 dashboard in this folder.
 - **Create Dashboard 2.0:** Creates a Dashboard 2.0 dashboard in this folder.
 - **Create Folder:** Creates a new folder.
 - **Delete:** Deletes a folder. The folder must be empty to delete it.
 - **Rename:** Renames a folder. The folder cannot be renamed if it contains other folders.
 - **Move to:** Moves the folder to another location in the folder hierarchy.
 - **Convert All Dashboards to 2.0:** Finds any Dashboard 1.0 dashboards within the folder hierarchy, and converts them to Dashboard 2.0 dashboards.
- Individual Dashboard Actions:
 - **Edit:** Opens the dashboard in the Dashboard Designer with the underlying form data. The dashboard opens in a dynamic tab.
 - **Edit without Data** (Dashboard 2.0 option only): Opens the dashboard in the Dashboard Designer without the underlying form data so you can more easily perform such actions as realigning the dashboard components and tiles. The dashboard opens in a dynamic tab.
 - **Rename:** Renames a dashboard.
 - **Copy As:** Copies a dashboard with a new name. The dashboard is copied to the listing directly under the original dashboard.
 - **Delete:** Deletes a dashboard.
 - **Move to:** Moves a dashboard to another folder.
 - **Assign Permission:** Assigns access permissions to the dashboard.
 - **Convert to Dashboards 2.0** (Dashboard 1.0 option only): Converts the Dashboard 1.0 dashboard to a Dashboard 2.0 dashboard.
 - **Copy URL:** Enables you to copy and share the direct URL for a dashboard. See Copying Individual URLs in *Administering FreeForm*.

Working with Dashboard 1.0 Dashboards

As a reminder, Dashboard 1.0 dashboards on the listing page are identified by this icon:



Move the cursor over an object on the dashboard to display the hover toolbar




Dashboard 1.0 hover icons provide options such as **Instructions**, **Actions**, **Save**, **Refresh**, **Settings**, and **Maximize**, depending on the type of object.


To work with objects in Dashboard 1.0 dashboards, from the hover toolbar:

- Click **Instructions**



to view instructions for a form (only available if instructions are configured for a form).

- Click **Actions**  to access such form options as **Spreadsheet Export** or **Supporting Detail**.

- Click **Settings**  to change the chart type associated with the form or its height percentage.

Customize charts in dashboards. Each chart type has options that are specific to it. For example, for a bar chart, you can set:

- The width percentage of the bars
- The type of chart displayed (for example to area, bubble, column, doughnut, funnel, gauge, scatter, radar, and so on)
- The chart to display in 3D
- Horizontal or vertical placement
- The background
- The legend's and label's position

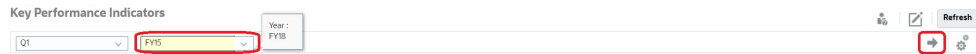
And if the 1.0 dashboard includes a gauge chart type, you can set the **Maximum Value** that the dial displays.

To learn more about dashboards and chart type options, see *Designing Dashboards in Administering FreeForm*.

To select members in a 1.0 version of a dashboard, use the member selector. See *Using the Member Selector in Administering FreeForm*.

Some other points to know about using 1.0 dashboards:

- Changes you make to the chart type options aren't saved for the next session. Clicking **Save** saves the data you enter or change, but not the dashboard definition.
- If you select a new value from the Page drop-down in dashboards, a Go button (right arrow) is displayed in the POV bar.



Click the Go button to show your selection.

- You can enter or change data in a form's cell only if the intersection in the underlying form is writable.
- In a Smart Form (with the form design option **Autosave** enabled), when you enter data and tab out of the cell, the other objects refresh, displaying fresh data.
- By default, missing or suppressed data is plotted as zeros in graphs. You can clear the **Plot Missing Values as Zero** setting to ignore missing or suppressed data in certain chart types so it's no longer plotted as zeros. The chart types to which this setting applies are Area, Bubble, Combination, Line, Radar, and Scatter.
- For Dashboards that use a **Flexible** layout, you can drag an object's border to resize it. You can also click an object's handle to expand it, and then click the handle again to restore the object to its original size.

Working with Dashboard 2.0 Dashboards

Helpful information about working with Dashboard 2.0 dashboards in the runtime environment.

As a reminder, Dashboard 2.0 dashboards on the **Dashboards** page are identified by this icon:



Opening a dashboard from the **Dashboards** page, opens the dashboard in the *runtime* environment.

To open a Dashboard 2.0 dashboard, see [Viewing Dashboards](#).

Videos

Your Goal	Watch This Video
Learn about the new features and functionality in runtime Dashboards 2.0 in Cloud EPM.	 Overview: New Features in Dashboards 2.0 in Cloud EPM (Nov 2023)

Related links:

- [Working with the Dashboard 2.0 Global Toolbar](#)
- [Working with Dashboard 2.0 Components](#)
- [Drilling Through on Charts and Legends](#)
- [Working with POVs in Dashboard 2.0](#)
- [Opening the Member Selector in Dashboards 2.0](#)
- [Working with Dashboard 2.0 Dashboards in Navigation Flows](#)
- [Working with Master Forms and Details in Dashboard 2.0 Components](#)
- [Support for Valid Intersections in Dashboard 2.0 Dashboards](#)

Working with the Dashboard 2.0 Global Toolbar

The icons and menus at the top of each dashboard enable you to perform the following actions on the entire Dashboard 2.0 dashboard:

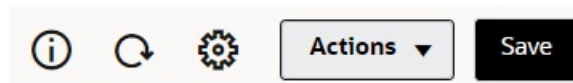





Table 6-1 Dashboard Header Toolbar

Object	Description
	<p>Information: Displays the name of the dashboard, the path to the location of the dashboard within the Library hierarchy, and any descriptive information. For example:</p> <ul style="list-style-type: none"> • Name: Operating Expenses - Actual vs Plan • Path: /Library • Description (Optional): Enter a description of the dashboard.
	<p>Refreshes the data for the entire dashboard.</p>
	<p>Displays the POV Settings menu with the following menu options:</p> <ul style="list-style-type: none"> • POV : Hide Dimension Labels: Hides dimension labels in the global POV. • POV : Auto-Apply: Enables or disables the ability to automatically apply changes to the entire dashboard. If you change a page in the global POV bar and POV : Auto-Apply is enabled, the page changes for all components in the dashboard that are based on forms. • POV : Clear All Page Selections
Actions menu	<p>Displays the following dashboard actions (you must have the correct permissions to edit dashboards):</p> <ul style="list-style-type: none"> • Edit: Opens the dashboard in the Dashboard Designer with the underlying form data. The dashboard opens in a dynamic tab next to the current tab. • Edit without Data: Opens the dashboard in the Dashboard Designer without the underlying form data so you can more easily perform layout changes such as realigning the dashboard components and tiles or updating the form properties. The dashboard opens in a dynamic tab next to the current tab.
Save	<p>Clicking Save writes back all dashboard grid changes and runs any rules associated with the dashboard, including runtime prompts.</p> <p>Note:</p> <ul style="list-style-type: none"> • You can attach multiple rules with or without runtime prompts with global Save. • Runtime prompts open as a "drawer" from the right side for better usability. <p>Clicking Save saves the data you enter or change for all dashboard components, but it does not save changes to the dashboard definition.</p>

To edit dashboards, see Designing Dashboards in *Administering FreeForm*.

Working with Dashboard 2.0 Components

Dashboards are made up of components. Each component contains a dashboard object such as a form, a cube, or another visualization (charts, tiles, and so on).






Dashboard Component Toolbar

Hover over a component on the dashboard to display the component toolbar





The hover toolbar enables you to perform actions on the component only.

Table 6-2 Dashboard Component Hover Toolbar

Object	Description
	Information: Displays the underlying form name, the path of the form, and the cube for the component.
	Save: Saves changed data and runs rules associated with the component.
	Refresh: Refreshes the data associated with the dashboard component.
	Chart Type: Changes the visualization for the component.
	<p>Perform the following Actions on the component:</p> <ul style="list-style-type: none"> • Maximize: Enlarges the dashboard component. Once maximized, click Restore to minimize the dashboard component to its original size. • Open Form: Opens the runtime form associated with the component in a dynamic tab next to the current tab. • Edit Form: If you have the correct permissions, opens the form associated with the component in the forms editor. The forms editor opens in a dynamic tab next to the current tab.

Working with Component Objects in the Runtime Environment

- Changes you make to the dashboard components in the runtime environment aren't saved for the next session. Changes are also not saved if you click the Show/Hide bar to hide the icon ribbon at the top of the page; the page refreshes and any changes you've made will not be saved.
- By default, missing or suppressed data is plotted as zeros in graphs. You can change the **Plot Missing Values as Zero** setting to **No** to ignore missing or suppressed data in certain chart types so it's no longer plotted as zeros. The chart types to which this setting applies are Area, Bubble, Combination, Line, Radar, and Scatter. To reset the **Plot Missing Values as Zero** setting in the properties panel, click the tab for the type of chart (Area, Bubble, Combination, Line, Radar, or Scatter), then click **Yes** to toggle the setting to **No**.
- Components default to displaying the form grid and the grids displayed are writable if the associated form is a Forms 2.0 form. To replace a grid with a chart, hover over the grid to display the hover icons in the upper-right corner of the component. Click , and a menu of charts is displayed from which you can

- choose. Charts selected during runtime are not persisted when the runtime dashboard is closed.
- If a URL added to a dashboard doesn't work in the runtime environment, right-click the URL and open the link in a new browser tab.
 - While in a dashboard, you can right-click inside a grid to view the grid's context menu:
 - **Edit** options: **Cut, Copy, Paste, Clear**
 - **Adjust** options:
 - * **Adjust Data**: Increase or decrease the selected cell data by a positive or negative value, or a percentage value.
See [Adjusting and Spreading Data](#).
 - * **Grid Spread**: Specify an amount or percentage by which to increase or decrease values across multiple dimensions, based on the existing values in the target cells. You can select **Proportionally**, **Evenly**, or **Fill** spread pattern. To use Spread, your administrator must enable Grid Spread as a form property.
See [Spreading Values Using Grid Spread](#).
 - **Comments**: Explain data or provide background, and attach external files. You can add comments and attachments to a cell or to a range of cells across multiple dimensions.
See [About Cell Comments](#) and [Working with Attachments](#).
 - **Change History**: Displays the history of the changes made to the cell data.
 - **Lock/Unlock Cells**: Temporarily lock cells while you calculate and fill in other values. A lock icon displays on locked cells. To unlock the cells, click **Lock/Unlock Cells** again.
See [Locking Cells](#).
 - **Analyze on Cell**: Opens ad hoc in a dynamic tab.
See [Get Started Performing Ad Hoc](#).
 - **Apply Context**: Filters the data in the target forms or charts that is relevant to the data in a master form.
See [Creating Dashboards Containing Master Forms and Details in Administering FreeForm](#).
 - Line item details are supported only if the component is maximized. To maximize a component, hover over the component to display the hover icons in the upper-right corner of the component. Click , and then select **Maximize** to enlarge the dashboard component. After you're done working with the component, click **Restore** to minimize the dashboard component to its original size.
 - When you click **Refresh Data** either on a Tile or by clicking the global **Refresh Data** option, the Tile data will display after a "blink." The "blink" indicates that the refreshed data is populated.
 - When viewing a Table, parent members are highlighted to distinguish them from leaf-level members.

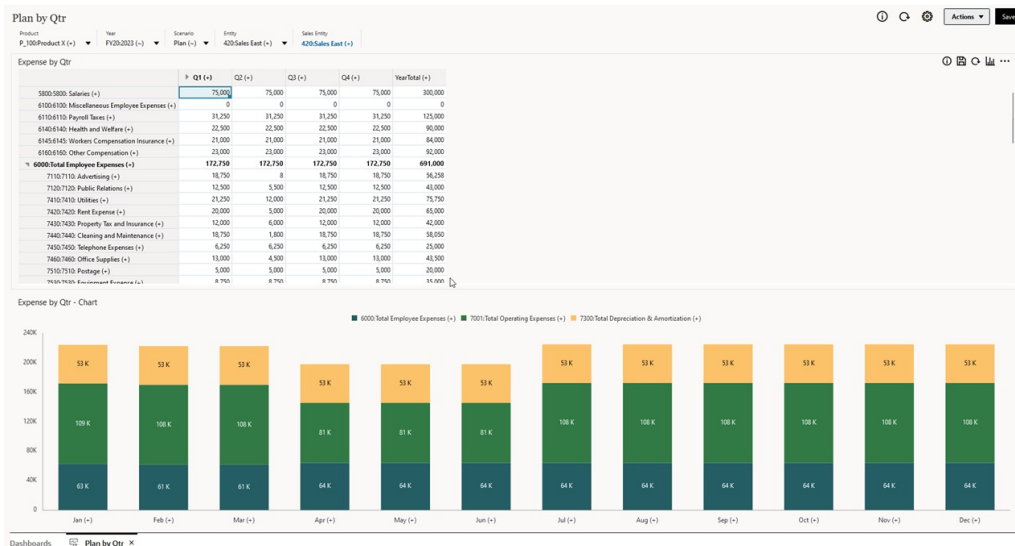
Working with Forms 2.0 Grids in Dashboard 2.0

In Dashboard 2.0, you can work directly with data in forms grids if the underlying form is a Forms 2.0 form.

Newly added components in Dashboard 2.0 default to displaying the form grid, and the grids are writable if the associated form is a Forms 2.0 form.


In grids you can update cell values, run rules, and save changes facilitating write-back from the dashboard.

Example Dashboard 2.0 Dashboard with a Grid



Saving Updates to Dashboard 2.0 Grids

After updating a grid within Dashboard 2.0, clicking the global **Save** button writes back all dashboard grid changes and runs any rules associated with the dashboard, including runtime prompts.

Clicking  within an individual grid component in a dashboard writes back the changes for that grid and runs the rules associated only with the individual grid.

Rules

The Dashboard Designer includes an **Associations** tab in the Properties panel for associating rules to a dashboard.

For more information, see Properties Panel in *Administering FreeForm*.

When you save a dashboard or a grid component in a dashboard, any rules associated with the grids will launch when the dashboard grid is saved, including runtime prompts. Runtime prompts open as a "drawer" from the right side.

Grids in Master Details Dashboards

Dashboard 2.0 supports designating grids as the master component when designing dashboards with master details.

To filter the data in the target forms or charts that is relevant to the data in a grid, right-click the relevant data row in the master grid and select **Apply Context**.

Revenue Plan

4102 Hardware (*)	Q1 (*)	Q2 (*)	Q3 (*)	Q4 (*)	Year Total (*)
Sentinel Standard Notebook (*)	645,380	591,560	627,440	645,380	2,509,760
Sentinel Custom Notebook (*)	620,020	772,020	690,400	547,200	2,649,640
Envoy Standard Notebook (*)	498,240	487,200	504,240	489,560	1,979,240
Envoy Custom Notebook (*)	470,850	620,060	447,630	457,740	1,996,280
Other Computer (*)	307,675	394,475	340,225	406,875	1,449,250
Tablet Computer (*)	777,500	800,500	794,500	794,500	3,167,000
Computer Equipment (*)	5,901,565	5,666,215	5,551,435	5,529,955	23,622,270

Product Revenue Assumptions - Accessories

Tablet Computer (*)	Jan (*)	Feb (*)	Mar (*)	Q1 (*)	Apr (*)	May (*)	Jun (*)	Q2 (*)	Jul (*)	Aug (*)	Sep (*)	Q3 (*)	Oct (*)	Q4 (*)	Year Total (*)
Units (*)	578	509	468	1,555	918	526	481	1,860	590	522	477	1,600	590	500	500
ASP (*)	500	500	500	500	500	500	500	500	500	500	500	500	500	500	500
Gross Margin % (*)	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%	40.00%

Product Revenue Plan

Tablet Computer (*)

Bar chart showing revenue components for Tablet Computer (*) across quarters and year total. The Y-axis ranges from 0 to 3.5M. The legend includes: Units (*), Average Price (*), Gross Profit Margin (*), Total Revenue (*), Total Cost of Sales and Service (*), and Gross Profit (*).

Context Menu in Dashboard Grids

While in a dashboard, you can right-click inside a grid to view the grid's context menu:

- **Edit options: Cut, Copy, Paste, Clear**
- **Adjust options:**
 - **Adjust Data:** Increase or decrease the selected cell data by a positive or negative value, or a percentage value.
See [Adjusting and Spreading Data](#).
 - **Grid Spread:** Specify an amount or percentage by which to increase or decrease values across multiple dimensions, based on the existing values in the target cells. You can select **Proportionally**, **Evenly**, or **Fill** spread pattern. To use Spread, your administrator must enable Grid Spread as a form property.
See [Spreading Values Using Grid Spread](#).
- **Comments:** Explain data or provide background, and attach external files. You can add comments and attachments to a cell or to a range of cells across multiple dimensions.
See [About Cell Comments](#) and [Working with Attachments](#).
- **Change History:** Displays the history of the changes made to the cell data.
- **Lock/Unlock Cells:** Temporarily lock cells while you calculate and fill in other values. A lock icon displays on locked cells. To unlock the cells, click **Lock/Unlock Cells** again.
See [Locking Cells](#).
- **Analyze on Cell:** Opens ad hoc in a dynamic tab.
See [Get Started Performing Ad Hoc](#).
- **Apply Context:** Filters the data in the target forms or charts that is relevant to the data in a master form.
See [Creating Dashboards Containing Master Forms and Details in Administering FreeForm](#).

Considerations for Working with Grids in Dashboard 2.0

- A Dashboard 2.0 dashboard will not open if the dashboard contains a grid and the **Forms Version** application setting is set to **Forms 1.0**.
- The Grid visualization option will not be available if the **Forms Version** application setting is set to **Forms 1.0** and Dashboard 2.0 artifacts are created.

Drilling Through on Charts and Legends

Drill-through can be performed on parent members to view the values of child members.

You can drill into more detailed information about the data within charts and their legends. To view drill-through details in a chart such as a Pie chart, click a color in the pie. Drill-through works for components with single Doughnut and Pie charts, as well as components with multiple Doughnut and Pie charts.

Drill-through is also available from the chart's legends. Click a legend label, and the chart changes to display drill-through details for that legend item.



Note:

Drill-through in multiple Pie and Doughnut charts from legends is not supported.

To return to the original chart after viewing drill-through details, click the parent link that displays in the upper right corner of the window.



Note:

Table, Tile, and Gauge charts do not support drilling. If you drill into a chart type such as a Pie chart, then switch to a Table, Tile, or Gauge chart, you'll no longer see the parent link to return to the original chart. If this occurs, switch back to the Pie chart to view the parent link again.

Working with POVs in Dashboard 2.0

POV Settings

When your Dashboard 2.0 dashboard contains a global or local POV, changes to the POV are automatically applied. If you don't want to automatically apply changes, you can deselect auto-apply for the POV bar in the dashboard **POV Settings** menu. Click



, and then click **POV : Auto-Apply** to deselect it.

Searching for POV Members

When working in Dashboard 2.0 dashboards, you can more easily search for new POV members in the dashboard's global or local POVs. To search, click a POV link,

type the name of another member, and the search function will automatically filter to that member name. The search interface also displays a list of the most recently used members from which you can choose.



Note:

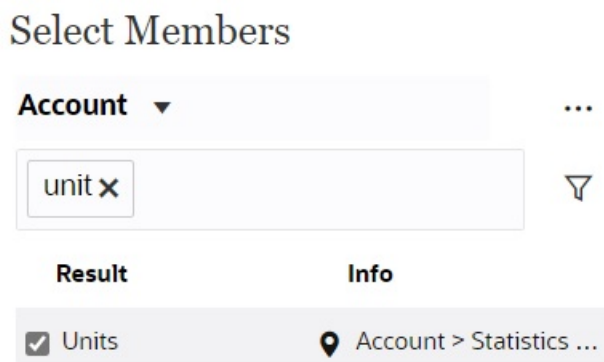
Valid intersections are supported for global and local POV bars. This means that Dashboard 2.0 complies with valid intersection rules by excluding invalid intersections from global and local POV bars.

Figure 6-1 POV Member Search Interface

Accessories Revenue Plan		
Scenario	Year	Sales Entity
Plan	FY23	Sales East
		Version View
		Working
Revenue Assumptions - Accessories		
Units	Jan	Feb
Member Selector ...	8,589	6,162
ASP	10,634	7,155
Gross Margin %	762	959
<Clear Selection>	1,122	1,423
	4,204	2,858
	4,337	2,978
	8,315	6,200
	▶ Q1	
	23,526	

You also can search using the member selector. Click a POV link, then click the member selector icon to launch the member selector. Members in the member selector are displayed as a hierarchy or you can type a member name in the **Search** box. If a member is located using the **Search** box, you'll see a result displayed under the Search box.

Figure 6-2 Select Members Search




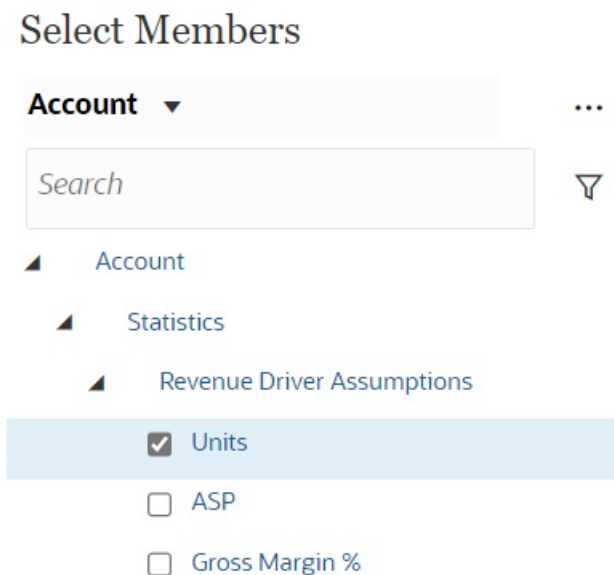
You can view where the member is located within the hierarchy by hovering over the result's **Info** column and clicking .

Figure 6-3 Select Members Search Result in Hierarchy

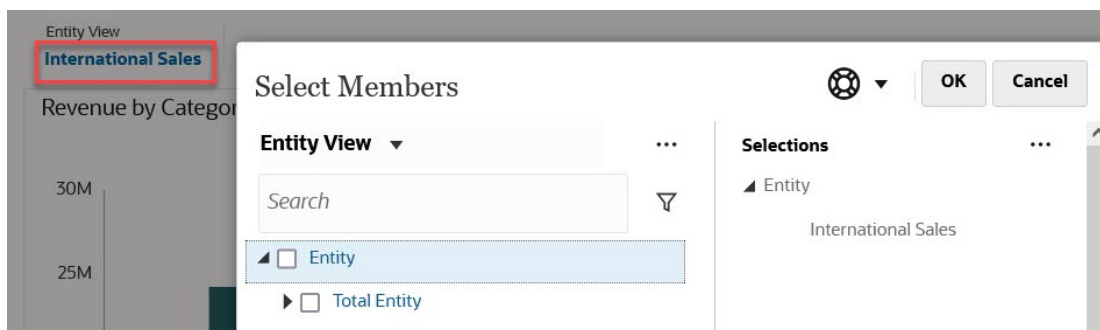


Opening the Member Selector in Dashboards 2.0

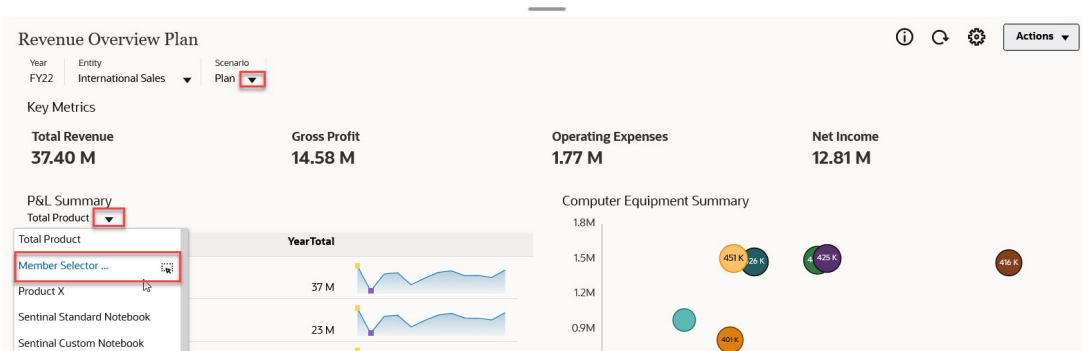
To select members in Dashboards 2.0, use the member selector.

To open the member selector from a Dashboards 2.0 dashboard:

Click a member on the Global POV bar:



You can also click the Page drop-down list in a Global or local POV, and then select **Member Selector**:



In a business rules run-time prompt, when the prompt is for members, click the **Member Selector** icon:



For more information about using the member selector, see [Using the Member Selector](#).

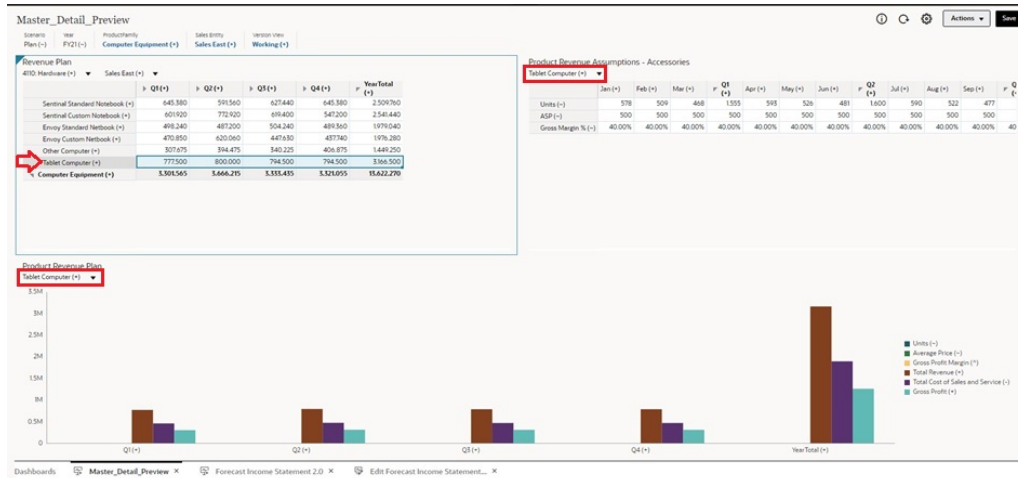
Working with Dashboard 2.0 Dashboards in Navigation Flows

If Dashboard 2.0 and Forms 2.0 are enabled in your business process, navigation flows support the features included in Dashboard 2.0 and Forms 2.0, including the ability to edit a form from within the runtime dashboard, and editing it with or without data. Dashboard 2.0 component actions such as **Maximize** and **Open Form** also work directly within the navigation flow.

Working with Master Forms and Details in Dashboard 2.0 Components

Your administrator can design dashboards that have one master form and multiple detail or target components (forms or charts). With this dashboard configuration, the selection of members in the master form automatically filters to the members in the target components, and the target components show only the details that are relevant to the members highlighted in the master form.

To filter the data in the target forms or charts that is relevant to the data in a master form, right-click the relevant data row in the master form and select **Apply Context**.



To learn more, see *Creating Dashboards Containing Master Forms and Details in Administering FreeForm*.

Support for Valid Intersections in Dashboard 2.0 Dashboards


Your administrator can create rules which allow data entry within certain cell intersections in forms. These intersections are called valid intersections.

Dashboard 2.0 complies with valid intersection rules by excluding invalid intersections from dashboards during runtime. If members have been defined by your administrator to be excluded, the runtime dashboard and the member selector will not display those members.

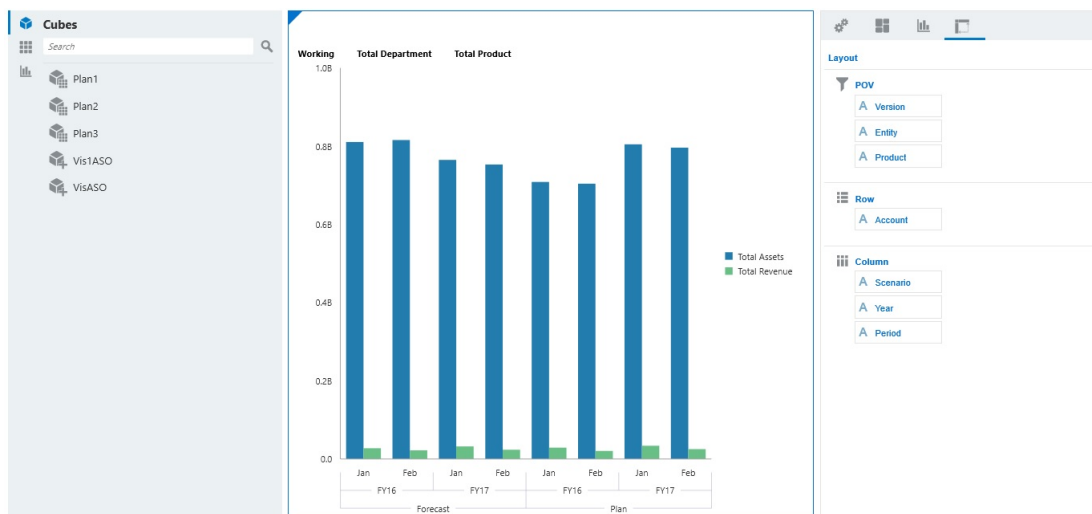
To learn more, see *Understanding Valid Intersections in Administering FreeForm*.

About Quick Analysis

Quick Analysis lets you add components to dashboards without having a prebuilt form. You create an ad hoc query by typing member names in the Search bar or using the

Member Selector, and then you control the layout of the query in the Layout tab  of the Properties panel.

Example Dashboard 2.0 Quick Analysis Chart in Design Mode




To create a quick analysis in your dashboard:

1. Select a cube for the query. You can do this in one of two ways:
 - Click in the workspace Search box to display a list of cubes, then select a cube.
 - Drag and drop a cube from the object palette to the dashboard workspace.

Note:

With either method, the system starts with a default query; a single intersection in the cube driven from your Most Recently Used, or MRU. The default query varies based on what you've recently been looking at in the cube.



If the MRU intersection in the cube is invalid, you'll get an error. If you see an error, open another form and change the page to a valid intersection so that the MRU gets updated with a valid intersection.


2. Refine the query by specifying members for the query:
 - In the Search box, type member names to display an auto-complete list from the cube.
 - Launch the member selector  to select members, and then click **OK**.

Note:

When using the Search box to find members for quick analysis and more than 25,000 members are present in a cube, the Search box only searches the first 3000 members in the dimension for the cube. If the cube contains less than 25,000 members, then the Search box will search through all members. To search a cube with more than 25,000 members, launch the member selector to make your quick analysis selections.

3. Select a chart type for the query.

Click  to select a chart type; for example, Bar .

4. In the Properties panel, click the Layout tab .
5. Drag and drop the dimensions in the Layout tab of the Properties panel to other sections of the Layout tab to change the POV, Row, and Column layout of the dashboard component.

Videos

Your Goal

Discover how to add quick analysis components to dashboards without having a prebuilt form. You learn how to create an ad hoc query in the Dashboard Designer and format the results by changing the dimension layout and applying visualizations.

Watch This Video



[Creating Quick Analyses in Dashboards 2.0](#)

7

Viewing Key Information with Infolets

Infolets provide quick insights into data that guide your decisions and actions.

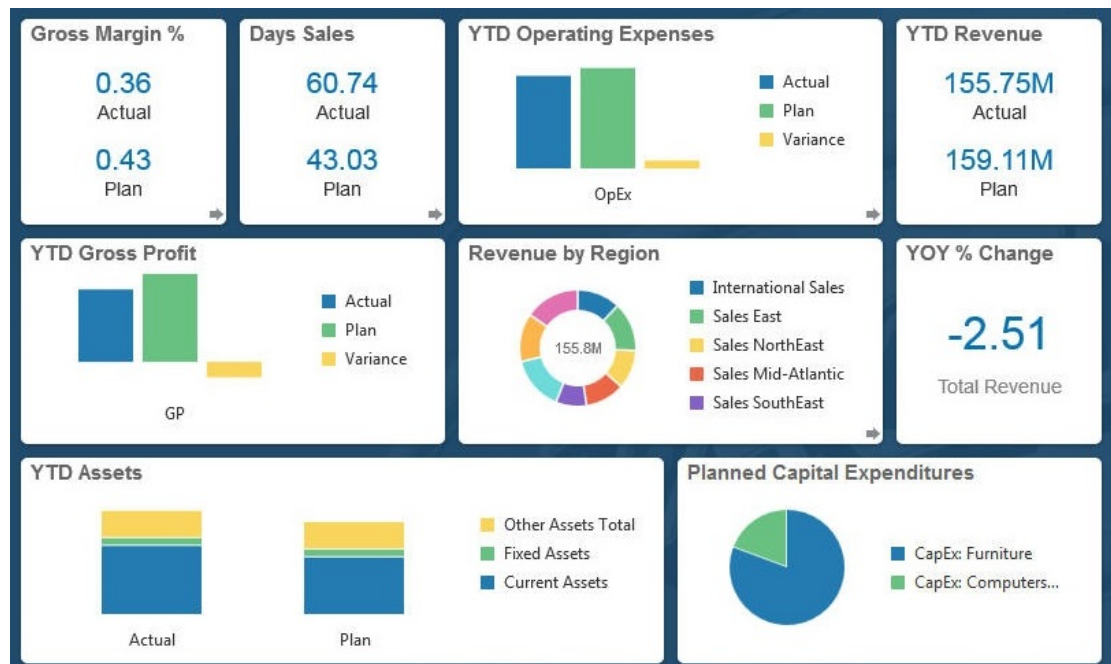
Infolets present a visually engaging overview of high-level, aggregated information and can help you quickly analyze data and understand key business questions such as:

- Where is it most important to direct my attention?
- What critical information has recently changed?
- How many orders are in jeopardy, listed by status?

Getting an instant overview into key information enables you to react quickly to changing conditions.

Your administrator can design an infolet to display a chart, a data point in a form, or an entire form. The administrator may design an infolet to progressively display more detail when you flip or expand it. (Only administrators can design infolets.)

To draw your attention to important data, your administrator can set an infolet page that displays directly on your Home page. A sample infolet page:



Other ways you can access infolets:


- Infolet dots

See [About the Infolet Dots](#). If the infolet content takes more space than can be displayed on a page, use the scroll bar on the right.

 **Note:**

Using the Navigation Flow designer, your administrator can define up to seven infolet dots on the Home page. If your administrator can create connections to other EPM Cloud business processes, infolets can link to infolet pages in other EPM Cloud business processes.

- The **Infolets** icon on the Home page opens the **Infolets** listing page

To search for a specific infolet on the listing page, click . See [Searching for Forms, Dashboards, and Infolets](#).

You can copy and share the direct URL for an infolet by clicking the **...** icon next to the infolet, and then selecting **Copy URL**.

About Infolet Views

Your administrator can design up to three views in an infolet.

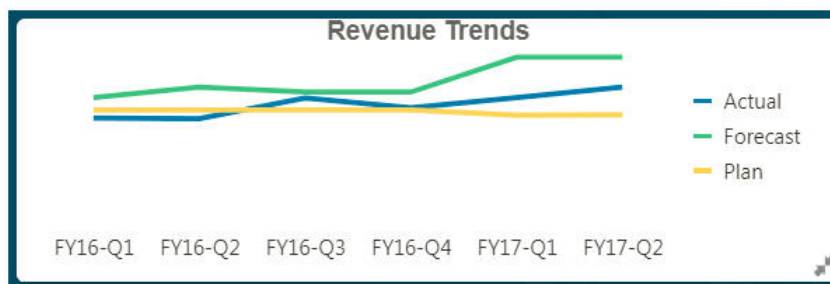
The front page typically identifies key information. For example:



If an infolet has a back view, hover over the bottom right corner to see the flip arrow, and then click it. Back views typically present more analytical information, such as a graph. For example:



To flip to the front view again, hover over and then click the bottom left arrow. An infolet may have an expanded view to present even more detailed information. If so, hover over and then click the double arrow in the bottom right corner to see an expanded view. For example:



To return to the front or back view from an expanded view, click the double arrows in the bottom right corner.



Note:

Infolet views honor the access permissions that are assigned to the underlying forms and dimensions. So, your infolet views may differ from other users' views to the same infolet.

About the Infolet Dots

You open infolets that your administrator gives you access to by clicking the dots towards the top of the Home page.

For example:



- The first dot links to the Home page.
- The second dot links to your default, or favorite, infolets page. See [Setting Your Default Infolet](#).
- The third through up to ninth dots link to other infolets that your administrator created.

Setting Your Default Infolet

You can set an infolet that you access most often as the default. Clicking the second dot on your Home page displays your default infolet.

To set your default infolet:



1. On the Home page, click **Infolets**.
2. From the **Actions** menu for the infolet you want to be the default, click **Default**. To undo the **Default** setting, click **Unmark**.

Only an infolet page can be marked as default. You can no longer mark a dashboard page as default.

8




Using Ad Hoc for Data Entry and Analysis

Using ad hoc grids, you can quickly drill into data slices that are important to you.

Examples of how ad hoc grids can help you focus your attention:

- Change drivers for a set of products that you work with due to changes in actuals.
- Quickly review profit margins in your regions.
- Change the set of accounts in an ad hoc grid that someone else set up.
- Drill into a variance number to understand the source of the variance.
- Use an ad hoc grid in Oracle Smart View for Office that you set up in your business process. To learn more, see *Oracle Smart View for Office User's Guide*.

Videos

Your Goal	Watch This Video
Learn how to perform EPM grid operations such as entering line item details, comments, attachments, sorting and filtering grid members, adjusting grid data, and using shortcut keys. You can use EPM grids, or ad hoc grids, to personalize focused data slices that you frequently use for analysis.	 Performing New EPM Grid Operations
Learn how to perform ad hoc operations such as selecting members, moving dimensions, and saving grid data and definition. You can use ad hoc grids to personalize focused data slices that you frequently use for analysis.	 Designing Ad hoc Grids in EPM Cloud Platform
Learn how to create ad hoc grids using forms, cubes, and dashboards.	 Creating Ad Hoc Grids in EPM Cloud Platform



Get Started Performing Ad Hoc

In ad hoc grids, you can enter data and then analyze and change data in many ways by slicing and dicing the data from various angles.

Table 8-1 Actions You Can Take with Ad Hoc Grids

Your Goal	Learn More
Get started with ad hoc	See Creating an Ad Hoc Grid .
Design the grid for ad hoc	See Designing Ad Hoc Grids .
Look at the data from various angles (slice and dice)	Use Pivot to refine your analysis by moving dimensions to the POV, column, or row. See Pivoting Dimensions .
Quickly move around an ad hoc grid and enter data using shortcut keys	See Ad Hoc Grid Keyboard Shortcuts and Quick Data Entry Commands .

Table 8-1 (Cont.) Actions You Can Take with Ad Hoc Grids

Your Goal	Learn More
Further focus the data	<ul style="list-style-type: none"> Use Keep Selected and Remove Selected to customize your grid. Use Zoom In to view the next level of detail in a dimension or Zoom Out to a summary level.
Work with different data	Select different members using the versatile Member Selector . For example, you can select members based on their attributes, children, level, or branch. See Opening the Member Selector in Ad Hoc Grids .
View source details associated with the underlying data	Drill through to Data Integration. See Using Drilling Through to Source in <i>Administering Data Integration for Oracle Enterprise Performance Management Cloud</i> .
Change a value by a specific amount	Use Adjust . See Adjusting Values .
Build logic into a data value	Use Line Item Details . See About Using Line Item Details .
Explain assumptions behind data	Add a comment or attach an external file. See Adding Comments and Attachments .
Control the display and behavior of ad hoc grids	Click  , then  tab to manage the display and behavior of ad hoc grids. See Setting Properties for Ad Hoc Grids .
Perform free form ad hoc	Type member names into a blank grid and retrieve values. See Using Free-Form Ad Hoc .
Run business rules after performing ad hoc data changes	Click Rules to search for and launch business rules. See Applying Rules to Ad Hoc Grids .
Switch to Oracle Smart View for Office	Click Actions , and then Open in Smart View . See Opening Forms and Ad Hoc Grids from Web Applications in <i>Smart View for Office User's Guide 23.100</i> .

Creating an Ad Hoc Grid

You can create an ad hoc grid to slice and dice data in several ways.



Note:

To be able to create an ad hoc grid, your administrator must give you the role Ad Hoc - Create. If you don't have this role, you can work only with existing ad hoc grids.

You can create ad hoc grids from stand-alone forms or from forms within dashboards. If Redwood Experience is enabled, ad hoc opened from a dashboard or a form opens in a dynamic tab.

To create an ad hoc grid from scratch:

1. On the Home page, click **Data**.
2. On the **Data Entry** page, click **Create**, then **Ad Hoc Grid**, and then in **Select Cube**, select a cube for the grid.

By default, Account and Entity are on the row, and Years and Period are on the column. The other dimensions are on the POV (Point of View) above the grid. Select the members you want to work with in the ad hoc grid. See [Opening the Member Selector in Ad Hoc Grids](#).

 **Note:**

If its cube is aggregate storage and has no Year dimension, then only the Period dimension is on the column.

3. Alternatively, you can perform ad hoc analysis on existing forms with these options:
 - To create an ad hoc grid from a stand-alone form, open the form, click **Actions**, and then **Analyze**. Ad hoc functionality is now available, and your initial grid is based on the form's layout.
 - For forms in Dashboard 1.0 dashboards, maximize the dashboard form so that it fills the workspace, click **Actions**, and then **Analyze**, or if Redwood Experience is enabled, you can right-click the cell you want to analyze, and then select **Analyze on Cell**.
 - For forms in Dashboard 2.0 dashboards, right-click the cell you want to analyze, and then select **Analyze on Cell**.
4. Save the ad hoc grid by selecting **Save Grid Definition**. See [Submitting Ad Hoc Data and Saving the Grid Definition](#).

You can now use ad hoc functionality to focus and analyze data. See [Get Started Performing Ad Hoc](#).

 **Tip:**

To see high-level information about the grid, click **Property Panel**



. On the **General** tab, you can set how to display member names and select an alias table. See [Setting Properties for Ad Hoc Grids](#).

Submitting Ad Hoc Data and Saving the Grid Definition

You can update data in the cube by submitting changed data from ad hoc grids.

 **Note:**

Formatting isn't supported in Web ad hoc and formatting within saved ad hoc grids from Oracle Smart View for Office native mode may not be persisted if opened in Web ad hoc.

Submit data options include:

- **Submit Data Only:** Submits the data for the cells you've explicitly modified (made dirty) but not the grid design.
- **Submit Data Without Refresh:** Submits all data cells that you have explicitly modified (made dirty) and those that were not modified. All data cells are marked dirty and submitted. After the submit operation is completed, the entire grid will be refreshed.
- **Submit Data Range:** Submits only the cell data from selected cells. If there are dirty cells on the grid outside the range of the selected cells, the modified values aren't submitted and those cells will revert back to the value that was last stored.

To save the ad hoc grid, click **Save Grid Definition**.

Performing Calculations Without Having to Submit Your Changes (Calc on the Fly)

Use calc on the fly to change data values and see calculated changes instantly without submitting the updated values.

When working with Forms 2.0, or during ad hoc analysis, you can perform calc on the fly without having to submit changes to the database and refresh. This capability saves you time and enables you to do multiple changes to the grid at once.

For Forms 2.0, this option is available if your administrator enabled this feature for the form. When this feature is enabled, in a 2.0 version of a form, when you hover over a cell with a member formula attached, you see the member formula associated with the cell and you can perform calc on the fly.

For ad hoc analysis, your administrator might have enabled this feature for you. Or, you can set a display preference for calc on the fly by selecting **Yes** for **Enable User Formulas in Ad Hoc** on the **Display** tab in **User Preferences**. When this setting is enabled, in an ad hoc grid, when you hover over a cell with a member formula attached, you see the member formula associated with the cell and you can perform calc on the fly.

To perform calc on the fly:

1. Open a 2.0 version of a form or an ad hoc grid, and hover over cells to see members with formulas attached, for both member formulas and consolidation operators.
In this example, you can see the formula for **Sales** for **Jan**.

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	20	20	60
Sales East	30	30	30	90
Sales NorthEast	25	25	25	75
Sales Mid-Atlantic	20	20	20	60
Sales SouthEast	15	15	15	45
Sales South	12	12	12	36
Sales Central	10	10	10	30
Sales West	12	12	12	36
Sales	144	144	144	432

Row Sales Column BaseData Trips Jan member(403):
 410 +420 +421 +422 +423 +430 +440 +450 +66
 grid math:
 = EssSum(essMissing(1/0) , B4, B5, B6, B7, B8, B9, B10, B11)

There must be enter-able cells (level zero members) in the form or ad hoc grid in order for formulas to appear.

2. Perform calculations as needed, and then move the cursor from the cell:

- Modify values that contribute to a calculated cell. The calculated cell value is updated.
- Modify a calculated value. The cells that are on the form or ad hoc grid that contribute to the calculated cell are updated.
 For formula spreading to work correctly, all source cells for the calculated value must be visible on the form or ad hoc grid.

A color change indicates a modified cell. Cells refresh immediately to display the newly calculated values, without submitting the changes to the database.

In this example of modifying values that contribute to a calculated cell, modify the value of **Sales West** for **Jan**:

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	20	20	60
Sales East	30	30	30	90
Sales NorthEast	25	25	25	75
Sales Mid-Atlantic	20	20	20	60
Sales SouthEast	15	15	15	45
Sales South	12	12	12	36
Sales Central	10	10	10	30
Sales West	15	12	12	36
Sales	144	144	144	432

When you press Tab, calc on the fly calculates updated values for **Sales** for **Jan**, **Q1** for **Sales West**, and **Q1** for **Sales**. Note the color change for the newly calculated values.

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	20	20	60
Sales East	30	30	30	90
Sales NorthEast	25	25	25	75
Sales Mid-Atlantic	20	20	20	60
Sales SouthEast	15	15	15	45
Sales South	12	12	12	36
Sales Central	10	10	10	30
Sales West	15	12	12	39
Sales	147	144	144	435

In this example of modifying a calculated value, modify the calculated value **Sales** for **Feb**:

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	20	20	60
Sales East	30	30	30	90
Sales NorthEast	25	25	25	75
Sales Mid-Atlantic	20	20	20	60
Sales SouthEast	15	15	15	45
Sales South	12	12	12	36
Sales Central	10	10	10	30
Sales West	12	12	12	36
Sales	144	288	144	432

When you press Tab, the values that contribute to the calculated cell are updated. Note the color change for the newly calculated values.

	Trips	Trips	Trips	Trips
	Jan	Feb	Mar	Q1
International Sales	20	40	20	80
Sales East	30	60	30	120
Sales NorthEast	25	50	25	100
Sales Mid-Atlantic	20	40	20	80
Sales SouthEast	15	30	15	60
Sales South	12	24	12	48
Sales Central	10	20	10	40
Sales West	12	24	12	48
Sales	144	288	144	576

- When you've completed all of your modifications and are satisfied with the calculations, you can submit the modified values to the server, or you can discard your changes without submitting them.

You can also perform calc on the fly in Oracle Smart View for Office in 2.0 versions of forms or in ad hoc grids. See *Performing Calculations Without Having to Submit Your Changes* in *Working with Oracle Smart View for Office*.


Review the supported formula functions and operators. See *Supported Functions and Operators for Calc on the Fly* in *Working with Oracle Smart View for Office*.

Not all formula functions support calc on the fly. See *Unsupported Functions and Formulas for Calc on the Fly* in *Working with Oracle Smart View for Office*.

For additional considerations when performing calc on the fly, see *Guidelines and Considerations* in *Working with Oracle Smart View for Office*.

Tutorials

Tutorials provide instructions with sequenced videos and documentation to help you learn a topic.

Your Goal	Learn How
In this tutorial, you learn how to perform calc on the fly during ad hoc analysis using member formulas. You can work with calc on the fly either in the web or with Smart View.	 Performing Calc on the Fly in Cloud EPM


Accessing an Ad Hoc Grid

Open an ad hoc grid to personalize your view of and analyze data in a form.

You can access ad hoc from a stand-alone form or from a form within a dashboard. If Redwood Experience is enabled, ad hoc opened from a dashboard or a form opens in a dynamic tab.

To access a saved ad hoc grid:

1. On the Home page, click **Data**.

Ad hoc grids on the **Data Entry** listing page display the ad hoc grid icon  .

2. Click the name of the ad hoc grid.

To perform ad hoc on a stand-alone form, open the form, click **Actions**, and then click **Analyze**.

To perform ad hoc on a form within a dashboard:

- For forms in Dashboard 1.0 dashboards, maximize the dashboard form so that it fills the workspace, click **Actions**, and then click **Analyze**, or if Redwood Experience is enabled, you can right-click the cell you want to analyze, and then select **Analyze on Cell** to open ad hoc in a dynamic tab.
- For forms in Dashboard 2.0 dashboards, right-click the cell you want to analyze, and then select **Analyze on Cell** to open ad hoc in a dynamic tab.

Designing Ad Hoc Grids

Customize your ad hoc grids so that you can quickly access the relevant data.

Easy-to-use features enable you to design and refine your focused data slices.

Table 8-2 Customize Your Ad Hoc Grid with These Features

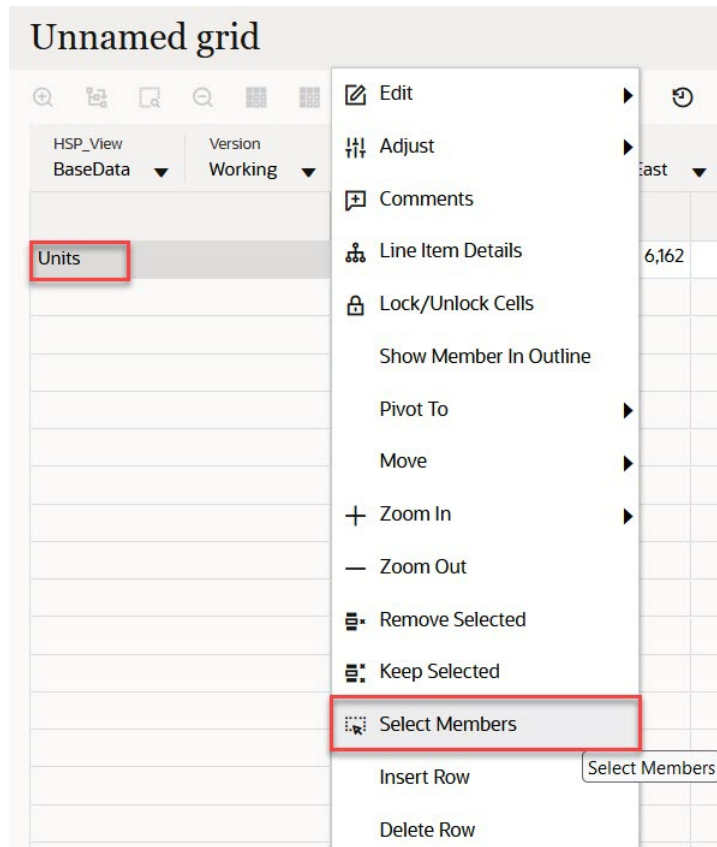
Your Goal	See this Topic
Refining the data to work with	Opening the Member Selector in Ad Hoc Grids
Moving dimensions from one axis to another	Pivoting Dimensions
Setting options such as how member hierarchy levels are indented	Setting Properties for Ad Hoc Grids
Defining logic to calculate cell data	About Using Line Item Details

Opening the Member Selector in Ad Hoc Grids

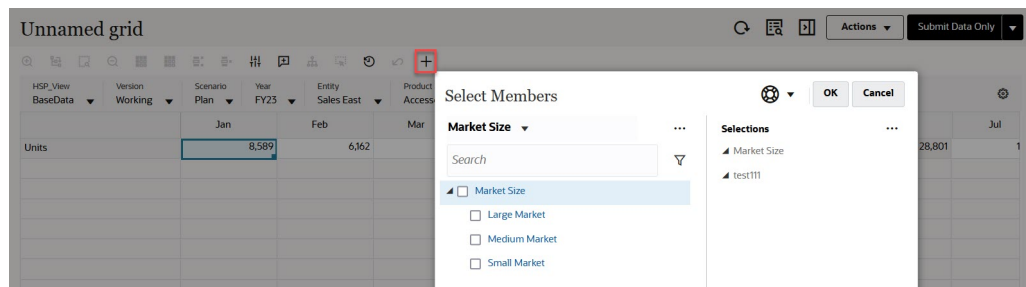
As you analyze data, you may want to manipulate the data you're working with. Selecting members for the POV, rows, and columns enables you to quickly set up and change the data you're analyzing. To select members in ad hoc grids, use the member selector.


The member selector enables you to set the user variables, substitution variables, and attributes in the ad hoc grid definition. To open the member selector from an ad hoc grid:

Right-click a member, and then select **Select Members**.



If attributes are available, click **Insert Attributes** icon on the toolbar.




You can also click  (POV Settings) and then select **Member Selector**.

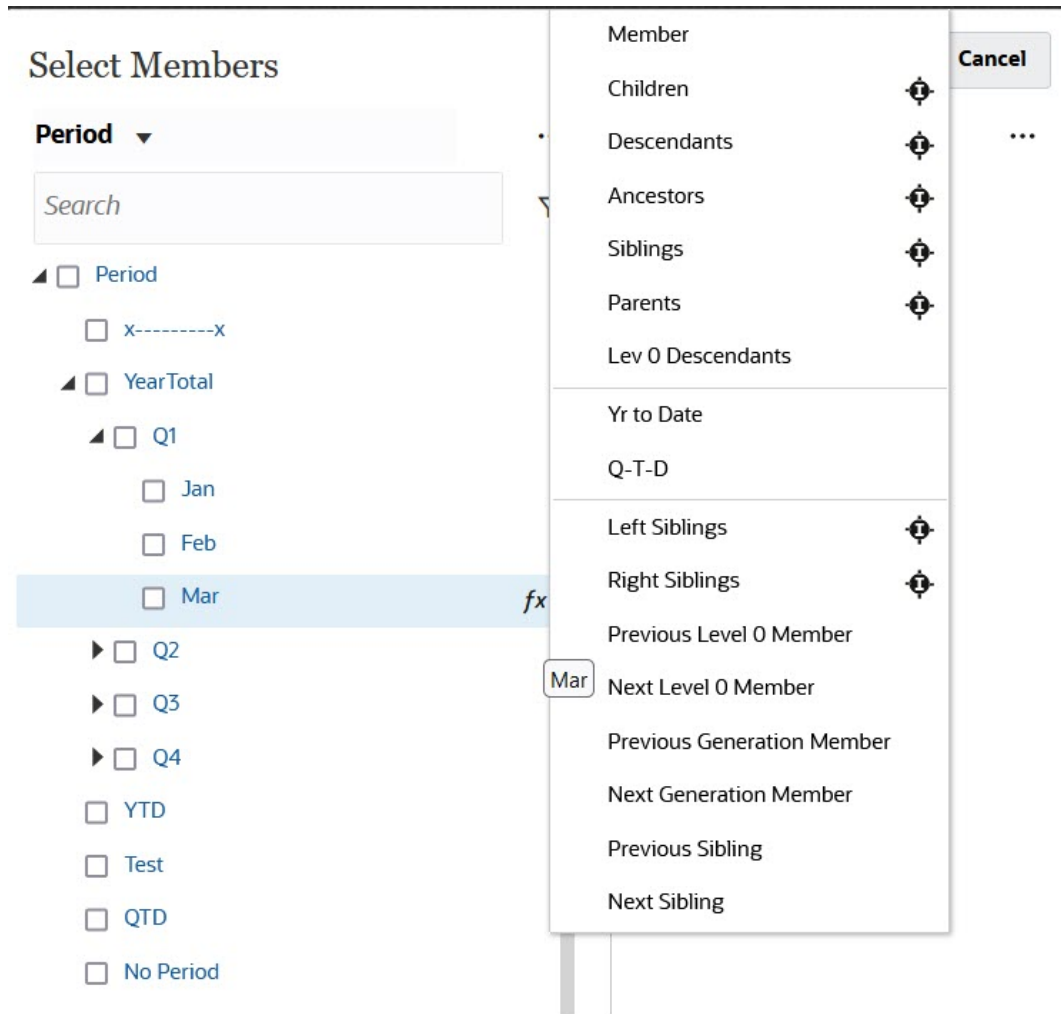
For more information about using the member selector, see [Using the Member Selector](#).

Selecting Period-to-Date Members

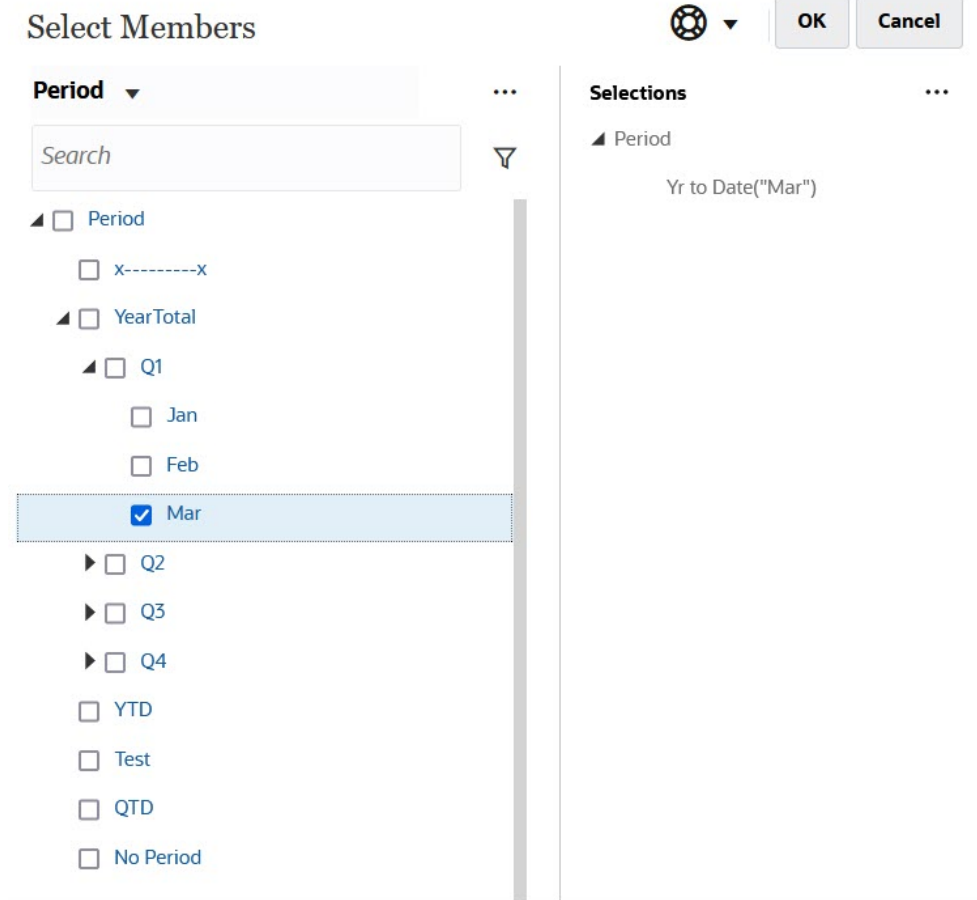
If the administrator set up Dynamic Time Series members for the Period dimension, you can select members that show period-to-date data. For example, to show data for year-to-date expenses, you could select a Dynamic Time Series member that includes data for January through August.

To select a Dynamic Time Series member:

1. Right-click the Period dimension on the ad hoc grid, and select **Member Selector**.
2. Click  next to a member to display available time series members; for example, Q-T-D.



3. Select a time series member from the list. In this example, with **March** selected, if you select **Yr to Date**, then **Yr to Date("Mar")** is added to the **Selections** pane.

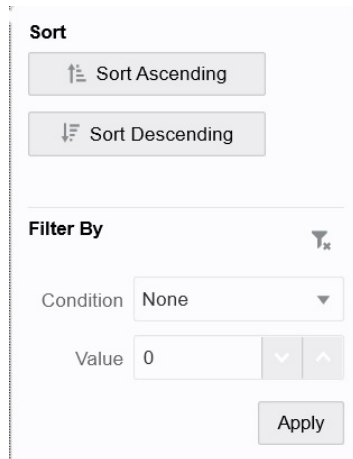


4. Click **OK**.

For more information about the member selector, see [Using the Member Selector](#).

Filtering Column Members

Robust filter options enable you to control the display of column members in the ad hoc grid. Hover over the column name, click the funnel to the right of the column name, and then select an action.



The screenshot shows a control panel with two sections. The top section, titled "Sort", contains two buttons: "Sort Ascending" with an upward-pointing arrow icon and "Sort Descending" with a downward-pointing arrow icon. The bottom section, titled "Filter By", features a funnel icon and a "Condition" dropdown menu currently set to "None". Below this is a "Value" input field containing the number "0", with small up and down arrow buttons to its right. An "Apply" button is located at the bottom right of the "Filter By" section.

Sort options enable you to sort by ascending or descending order and ignore the member hierarchy. **Filter By** options enable you to filter by **Condition** (such as Greater Than or Less Than) or by a **Value**. To remove sort and filter options, click



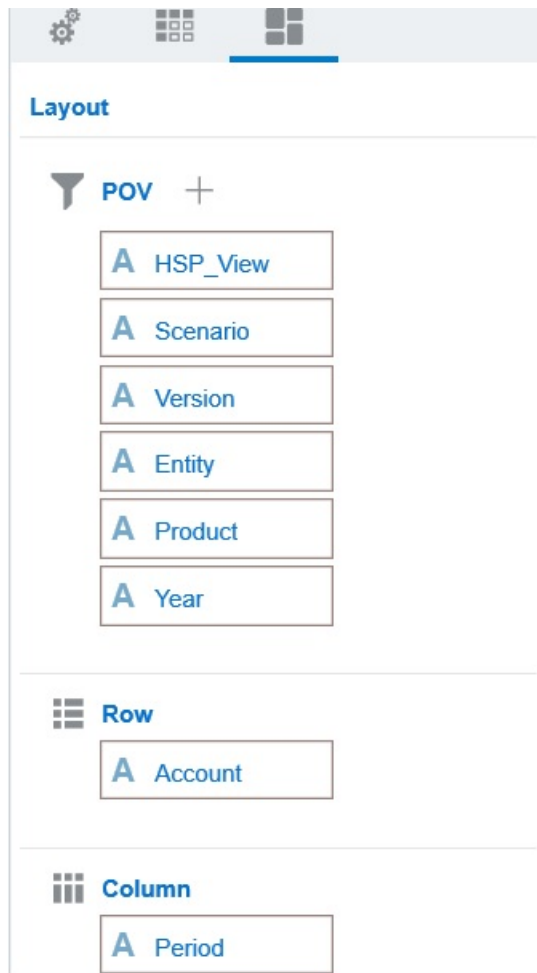
Pivoting Dimensions

Pivoting a dimension changes the orientation of data on the grid so you can view data from another angle, or slice and dice information.

You pivot a dimension by dragging it from one axis to another.

For example, you can:

- Drag a dimension from a row to a column or from a column to a row.
- Drag a dimension between the POV and a row or column.
- Reorder members by dragging them on the same axis.
- Drag dimensions to and from the **Layout** tab on the **Property Panel**:



A single dimension must exist on the row and column axis. You can't pivot the last remaining dimension in a row or column.

About Shared Members

A shared member shares storage space with another member of the same name, preventing duplicate calculation of members that occur multiple times in a FreeForm cube. Shared members are available for Entity, Account, and user-defined custom dimensions.

Sharing members allow alternate rollup structures within an application. A base member must exist before an administrator can create a shared member. Administrators can create multiple shared members for the base member. A base member must display before its shared members in position from top to bottom.

You can drill on shared members in an ad hoc grid, but an administrator must first enable a system setting called **Allow drill down on shared members in ad hoc**.

See *What Application and System Settings Can I Specify?* in *Administering FreeForm*.

Shared members are displayed similarly to base members in the dimension hierarchy for member selection in Oracle Smart View for Office.

Zooming in on Shared Members

Shared members are supported in ad hoc grids and the system recognizes whether a member is a base member or a shared member. If your administrator enables the application setting, **Allow drill down on shared members in ad hoc**, then zooming in on shared members is supported. In this case, zooming in on shared members is effectively the same as zooming in on the corresponding base members. You can zoom in on shared members one level at a time.

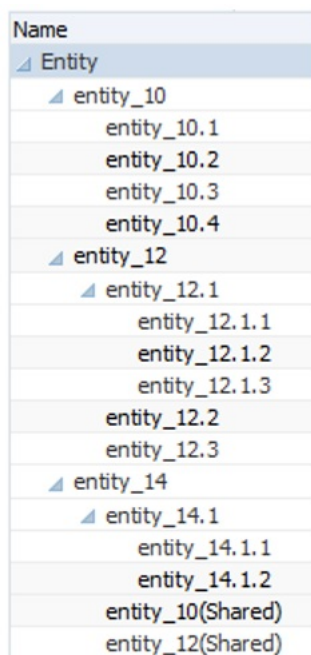
If your administrator enables the application setting, **Drill to All Levels in Base**, you can zoom in beyond just the shared members into all levels or only the bottom levels within the base hierarchy using the Zoom In options, **All Levels** and **Bottom Level**.

Example Shared Member Zoom In

This example describes the results you will see when **Allow drill down on shared members in ad hoc** is set to **Yes** and **Drill to All Levels in Base** is enabled.

[Figure 1](#) shows three hierarchies under the Entity dimension. In the `entity_10` hierarchy, all members descend from `entity_10`. In the `entity_12` hierarchy, all members descend from `entity_12`. In the `entity_14` hierarchy, there are descendent members of `entity_14` as well as the shared members, `entity_10` and `entity_12`. The shared members include their descendents.

Figure 8-1 Entity Dimension Showing Its Hierarchies



Name
Entity
entity_10
entity_10.1
entity_10.2
entity_10.3
entity_10.4
entity_12
entity_12.1
entity_12.1.1
entity_12.1.2
entity_12.1.3
entity_12.2
entity_12.3
entity_14
entity_14.1
entity_14.1.1
entity_14.1.2
entity_10(Shared)
entity_12(Shared)

[Figure 2](#) shows the difference between zooming in on `entity_14`:

- Using the Zoom In to All Levels command
- Using the Zoom In to Bottom Levels command

In both cases, in Oracle Smart View for Office, **Member Options, Ancestor Position** is set to **Top**.

Figure 8-2 Results of Zooming in on entity_14, with Ancestor Position=Top

Zoom In “entity_14” to **All Levels**

```
entity_14
  entity_14.1
    entity_14.1.1
    entity_14.1.2
  entity_10 (shared member)
  entity_10.1
  entity_10.2
  entity_10.3
  entity_10.4
  entity_12 (shared member)
  entity_12.1
    entity_12.1.1
    entity_12.1.2
    entity_12.1.3
  entity_12.2
  entity_12.3
```

Zoom In “entity_14” to **Bottom Levels**

```
entity_14
  entity_14.1.1
  entity_14.1.2
  entity_10 (shared member)
  entity_10.1
  entity_10.2
  entity_10.3
  entity_10.4
  entity_12 (shared member)
  entity_12.1.1
  entity_12.1.2
  entity_12.1.3
  entity_12.2
  entity_12.3
```

Note:

In a Native mode application, you can achieve the results shown in the Zoom In to All Levels example, if **Allow drill down on shared members in ad hoc** set to **Yes**, and **Drill to All Levels in Base** disabled; however, you will need to zoom in one level at a time on the shared members till you reach the bottom level of each hierarchy. You will not be able to zoom in directly to the bottom level of the shared members.

Setting Properties for Ad Hoc Grids

You can control the display and behavior of ad hoc grids by setting your preferences using the **Property Panel**.

Setting General Ad Hoc Properties

To set general ad hoc options:

1. In an ad hoc grid, click the **Property Panel** icon



, and then click **General**.


2. Under **Grid**, set these options:

- **Name**
- **Description**

- **Cube**
- For **Display Member Label**, choose from the following options:
 - **Distinct Member Name Only**
 - **Member Name Or Alias**
- **Alias Table**

Setting Ad Hoc User Options

To set ad hoc user options:

1. In an ad hoc grid, click the **Property Panel** icon , and then click **Adhoc Options**.
2. Under **Grid**, set how members are displayed:
 - **Member Inclusion:**
 - **Include Selection:** Select **Yes** to display both the selected member and the members retrieved as a result of the operation. For example, zooming in on the selected member Qtr1 displays data for Qtr1, Jan, Feb, and Mar.
 - **Within Selected Group:** Select **Yes** to perform an operation such as Zoom only on the selected group of members, leaving unselected cells as is. This setting is meaningful only when there are two or more dimensions down the grid as rows or across the grid as columns. This option pertains to **Zoom**, **Keep Only**, and **Remove Only**.
 - **Zoom in:** Select the level at which to zoom in:
 - **Next Level:** Get data for the children of the selected members.
 - **All Levels:** Get data for all descendants of the selected members.
 - **Bottom Level :** Get data for the lowest level of members in a dimension.
 - **Ancestor Position:** Set how to display ancestors in the hierarchy:
 - **Top:** Display member hierarchies from highest to lowest level.
 - **Bottom:** Display member hierarchies from lowest to highest level.
 - **Indentation:** Set how member hierarchy levels are indented:
 - **None:** Do not indent members.
 - **Subitems:** Indent descendants. Ancestors are left-justified in the column.
 - **Totals:** Indent ancestors. Descendants are left-justified in the column.
 - **Navigate without refreshing data:** Selecting **No** improves performance as you navigate around the grid, for example pivoting and zooming. Just click **Refresh** when you want to update the data. (If you select **Yes** for this option, data is refreshed as you work in ad hoc.)
3. Under **Suppression**, to simplify your view of the data, select options to suppress elements of the grid. For example, you can hide rows or columns with zero values.
 - **Zero Values:**
 - **None:** Select to display rows and columns that contain only zeros.
 - **Row:** Select to hide rows containing only zeros.

- **Column:** Select to hide columns containing only zeros.
- **Row and Column:** Select to hide rows and columns containing only zeros.
- **Repeated Members:** Select **Yes** to hide rows that contain repeated member names, regardless of the grid orientation.
- **Missing Data:** Select to hide rows or columns with zeros or that have no data:
 - **None:** Display rows and columns with zeros or that have no data.
 - **Row:** Hide rows with zeros or that have no data.
 - **Column:** Hide columns with zeros or that have no data.
 - **Row & Column:** Hide rows and columns with zeros or that have no data.
- **Missing Blocks on Rows:** Select **Yes** to hide blocks of cells in rows that have no data.
- **No Access:** Select to hide rows or columns that you don't have access to:
 - **None:** Display rows and columns that you don't have access to.
 - **Row:** Hide rows that you don't have access to.
 - **Column:** Hide columns that you don't have access to.
 - **Row & Column:** Hide rows and columns that you don't have access to.

 **Note:**

When trying to open an ad hoc grid, if you see the "Ad hoc grid cannot be opened as there are no valid rows of data" error, clear the **Suppression** options.

4. Under **Precision Values**, set the minimum and maximum number of decimal positions to display in a cell for the **Currency** values, **Non-currency** values, and **Percentage** values. For example, if the cell value is 100, and you select the **Minimum** precision "2", the value displays as "100.00". If you select a Maximum precision of "3 " and the cell value is 100.12345, the value displays as "100.123". Select **Use Currency member precision** to apply the precision setting of the **Currency** member.
5. Under **Replacement**, set labels to display for cells that are missing data, cells that you don't have access permission to view, or cells that have invalid data:
 - **No Data:** Enter the text that you want displayed for cells that have #Missing or #NoData as their value.
 - **No Access:** Enter the text that you want displayed for cells that you don't have access to.
 - **Submit Zeros:** Select **Yes** if you specified #NumericZero as the text for the **No Data** or **No Access** replacement option and you want to submit zeros to the application.
6. Click **Refresh**.

Setting Layout Options

You can use the **Layout** tab to remove attributes that are used within the ad hoc grid. This is the only place where attributes can be removed from the grid.

To set layout options for ad hoc grids:

1. In an ad hoc grid, click the **Property Panel** icon



, and then **Layout**.

2. See [Pivoting Dimensions](#).

Ad Hoc Grid Keyboard Shortcuts and Quick Data Entry Commands

Keyboard Shortcuts

You can quickly move around an ad hoc grid with these shortcut keys:

Key or Key Combination	Result
Tab	Moves to the next cell in the row. When focus is on the last cell of a row, Tab moves to the first cell of the next row.
Shift+Tab	Moves to the previous cell in the row. When focus is on the first cell of a row, Shift+Tab moves to the last cell of the previous row.
Up Arrow, Down Arrow	Moves up or down within the same column to the previous or next row.
Right Arrow, Left Arrow	Moves to the next cell or previous cell in the row.
Ctrl+Home	Moves to the first cell in the grid.
Shift+End	Moves to the last cell of the first row of the grid.
Ctrl+End	Moves to the last cell in the grid.
Ctrl+Right Arrow	Moves to the last cell in the current row.
Ctrl+Left Arrow	Moves to the first cell in the current row.
Shift+Space	Selects the row.
Ctrl+Space	Selects the column.
Ctrl+Up Arrow	Moves to the top row of the column.
Ctrl+Down Arrow	Moves to the bottom row of the column.
Ctrl+Shift+Up Arrow	Selects the cells in the column starting from the current cell to the top row of the column.
Ctrl+Shift+Down Arrow	Selects the cells in the column starting from the current cell to the bottom row of the column.
Shift+Left Arrow	Selects a cell to the left of the current cell in the row each time Left Arrow is pressed until it reaches the start of the row.
Shift+Right Arrow	Selects a cell to the right of the current cell in the row each time Right Arrow is pressed until it reaches the end of the row.
Shift+Up Arrow	Selects a cell above the current cell in the column each time Up Arrow is pressed until it reaches the top of the column.
Shift+Down Arrow	Selects a cell below the current cell in the column each time Down Arrow is pressed until it reaches the bottom of the column.
Shift+Click	Selects multiple cells by holding the Shift key and then using the mouse to select cells from different columns or rows in the grid.

Commands for Quickly Entering Data


You can use these shortcuts to quickly enter data in ad hoc grids. Enter the keys or symbols, and then press Enter or Tab.

Keys or Symbol	Result	Example
K	Enters the value in thousands.	Enter 5K for 5,000.
M	Enters the value in millions.	Enter 5M for 5,000,000.
Add or +	Adds a number to the cell value.	If the cell value is 100, entering Add10 after 100 results in 110.
/	Divides the cell value by a number.	If the cell value is 100, entering /2 after 100 results in 50.
Sub or ~	Subtracts a number from the cell value.	If the cell value is 100, entering Sub10 after 100 results in 90.
Percent or per	Multiplies the cell value by the percentage you enter.	If the cell value is 100, entering per10 after 100 results in 10% of the current cell value, or 10.
Increase or inc	Increases the cell value by the percentage you enter.	If the cell value is 200, entering inc10 after 200 increases the cell value by 10% of 200 (20), to 220.
Decrease or dec	Decreases the cell value by the percentage you enter.	If the cell value is 200, entering dec10 after 200 decreases the cell value by 10% of 200 (20), to 180.
Power or pow	Changes the cell value to the number, added as an exponent.	If the cell value is 100, entering pow2 after 100 multiplies the cell value by an exponent of 2, to 10,000.
gr	Grows a cell by a percentage.	If the cell value is 200, entering gr50 after 200 increases the cell value by 100, to 300.

Applying Rules to Ad Hoc Grids

After you submit new or changed data, you can run business rules that will calculate the data.

To apply a rule:

1. Open an ad hoc grid.
2. Click **Rules** .
3. If presented with a runtime prompt, enter or select the required information, and then click **Launch**.

If the rule runs successfully, a message displays and data is updated.

Adding Comments and Attachments

To explain data or provide background, you can add comments and attachments to a cell.

Valid attachment file types are:

- Image types permitted: .jpg, .gif, .png, .7z
- Non-image file types permitted: .csv, .xls, .xlsx, .txt, .zip, .jlf, .doc, .docx, .ppt, .pptx, .rtf, .pdf, .gdoc, .gsheet, .gslides, .msg

To add a comment or attachment:

1. Click in a cell, then select



2. Enter your comment. To attach a file, click



and browse to the file.

3. Click **Post**.

A blue triangle in the upper right of the cell indicates it has a comment or attachment. To read a comment or view an attachment, perform Step 1.



Note:

Forms 2.0 does not support adding comments or attachments to formula cells.

Adjusting Values

You can quickly adjust cell values in an ad hoc grid.

To adjust a cell's value:

1. Click in the cell.
2. Click **Adjust**



3. In **Adjust By**, enter a positive, negative, or percentage value, and then click **OK**.

About Using Line Item Details

To build logic into how a cell value is calculated, you can use the application's built-in calculator, called Line Item Details.



Note:

Line Item Details is replacing Supporting Detail and they are functionally the same. Detail can be added at the cell level or across multiple cells in the same row.

Line Item Details enables you to develop a cell value and save your assumptions behind the value. For example, you can add Line Item Details for Pens: ballpoint, fountain, marker, and so on. The Pen member can then display the total for all pen types. Or say you want to plan for a travel expense for an upcoming quarter using your own logic. This example shows how you can use line item details to plan travel expenses. The details are displayed below the grid:

	Jan
acc2	2850
▼ Air Fare ⊕	2,400.00
Customer Visits ⊕	2.00
Average Rate ⊗	1,200.00
▼ Hotel ⊕	450.00
Number of Nights ⊕	3.00
Rate per Night ⊗	150.00

To create line item details, click a row header, then click



. Click the Down Arrow in the top middle of the Line Item Details grid to collapse it.

About Line Item Details:

- You can include text, numbers, and operators that define how data is calculated.
- Hover over a cell to see if it has Line Item Details.
- Line Item Details don't add members to the ad hoc grid or change its organization.
- You must have write permission to cells that you create Line Item Details for.
- To protect the Line Item Details, the aggregate values in cells having Line Item Details are read-only.
- You can add Line Item Details only to base time periods (level-0 members). You can't add Line Item Details to Summary Time Periods, such as Quarters.
- Number and precision formatting is not reflected in the **Line Item Details** window.
- The sequence of operators follows the same logic as is used to process multiple operators in a complex calculation. See [Order of Line Item Details](#).

Adding Line Item Details

Use Line Item Details to set how detail items aggregate to cell values.

For an introduction to Line Item Details, see [About Using Line Item Details](#).

To work with Line Item Details:

1. Click a row header, and then click




2. A new grid displays below the ad hoc grid. In this grid, add rows that reflect the structure you want.


For example, click





, and then click **Add Child** to add a row directly below the selected row. See [Working with the Structure of Line Item Details](#).

3. In the text box, you can enter a description of up to 1,500 characters.
4. Click the default plus sign by each row, and then select the operator to set the mathematical relationships among the rows. Select from these operators:

 Approx

 Add

 Subtract

 Multiply

 Divide

5. When you've created the Line Item Details structure, enter the data to set or calculate. Enter numbers using the same scaling that was set up for the form. You can copy and paste data into Line Item Details.
6. Click **Apply**.

The values are dynamically calculated and aggregated before the data is saved.

For more information, see [Working with the Structure of Line Item Details](#).

Working with the Structure of Line Item Details

Learn how to work with the elements in Line Item Details.

To create or change the structure of Line Item Details:

1. Select the row for which you want to add Line Item Details and click



.








2. Click



and then click **Add Child**. Click **Untitled** and provide a name.

3. Add rows that reflect the structure you want. For example, click **Add Sibling** or **Duplicate**. Use these options from the toolbar before the **Line Item Details** grid:

Table 8-3 Options for Line Item Details

Option	Result
	Refreshes the Line Item Details grid. Click Yes to discard unsaved data, otherwise click No .
	Adds a child or sibling one level below the selected cell. You can add unlimited children, but consider the potential performance impact.
	Moves the selected row to the next-higher level.
	Moves the selected row to the next-lower level.
	Moves the selected row before its sibling predecessor.
	Moves the selected row after its sibling successor.
	Enables you to select a delete action: <ul style="list-style-type: none"> • Delete Row removes the selected row. • Delete All Rows removes all rows.

4. Click **Apply**.

Order of Line Item Details

The order of Line Item Details affects the resulting value that is saved.

Understanding the calculation order helps you correctly enter Line Item Details. Line Item Details leverage the calculation order of + (addition), - (subtraction), * (multiplication), and / (division). A simple Unit times Rates example demonstrates how to correctly enter Line Item Details.

See [Incorrectly Entering Line Item Details](#) and [Correctly Entering Line Item Details](#).

Incorrectly Entering Line Item Details

This example shows the order of rows in Line Item Details that generate incorrect data.

In the following table, Rate is set to the unary operator +. Hence, the calculation order first adds the Rate and then multiplies by the Unit, resulting in incorrect data for Feb and Mar.

	Jan	Feb	Mar
Rate +	250	250	250
Unit *	10		
Total:	2500	250	250

Correctly Entering Line Item Details

This example shows the order of Line Item Details generating correct values.

In the following table, the calculation order is Units multiplied by Rates, resulting in correct values.

When you add Line Item Details, verify the order of the rows to ensure that correct values are calculated and saved.

	Jan	Feb	Mar
Unit+	10		
Rate *	250	250	250
Total:	2500		

Totaling When Line Item Details Cells are Blank

If a cell in Line Item Details is blank, it's ignored when values are aggregated (instead of assuming that a blank cell means zero).

For example, you might define Line Item Details to calculate the daily rate of hiring an instructor (\$250) times the number of days per month for which you plan to hire an instructor (4 in January, but none in February). The Instructor total for Feb is 250, even though you don't intend to hire an instructor in Feb.

	Jan	Feb
Instructor	1000	250
Rate +	250	250
Days	4	

To correctly total values that are aggregated by the * multiplier when some cells are blank, you can leave the Rate cell blank, or enter a zero in the Days cell, instead of leaving it blank. This causes the rate (250) to be multiplied by 0 (zero), resulting in a value of zero for Feb.

	Jan	Feb
Instructor	1000	0
Rate +	250	250
Days	4	0

Printing Ad Hoc Grids

If you require printing, you can print ad hoc grids using the browser's print feature or the Excel Print feature in Oracle Smart View for Office.

To work with an ad hoc form in Smart View, open a form, click **Actions**, and then select **Open in Smart View**.

See Opening Forms and Ad Hoc Grids from Web Applications in *Smart View for Office User's Guide 23.100*.

Using Free-Form Ad Hoc

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

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

Free-Form Ad Hoc Guidelines

Consider these guidelines when working in free-form ad hoc.

- A grid must have at least one row dimension and one column dimension.
- Each row dimension can contain members of only one dimension. Each column dimension can contain members of only one dimension.
- Members of one dimension can be entered only in *one* of the following regions:
 - In the same row
 - In the same column
- Precede member names that contain spaces between words with a single quotation mark.
- Aliases from the current alias table are permitted in free-form grids, but aliases from other alias tables are treated as comments.

9

Using the Member Selector

Related Topics

- [About Selecting Members](#)
- [Selecting a Dimension](#)
- [Defining Member Display Options](#)
- [Searching for Members](#)
- [Filtering Which Members Are Displayed](#)
- [Making Member Selections](#)

About Selecting Members

You select members in the **Select Members** dialog box. The options in the dialog box may differ slightly depending on the feature for which you are selecting members.

You can select members to use with the following features:

- **Forms 2.0:** Use member selection to define the rows, columns, and the point of view to use in a form, and to select members for business rules run-time prompts.
- **Dashboards 2.0:** Use member selection to define the Global or Local POV, and to select members for business rules run-time prompts.
- **Ad hoc grids:** Use member selection to define the POV, rows, and columns, and to set the user variables, substitution variables, and attributes in an ad hoc grid.



Note:

The Member Selector is available only with Redwood Experience enabled.

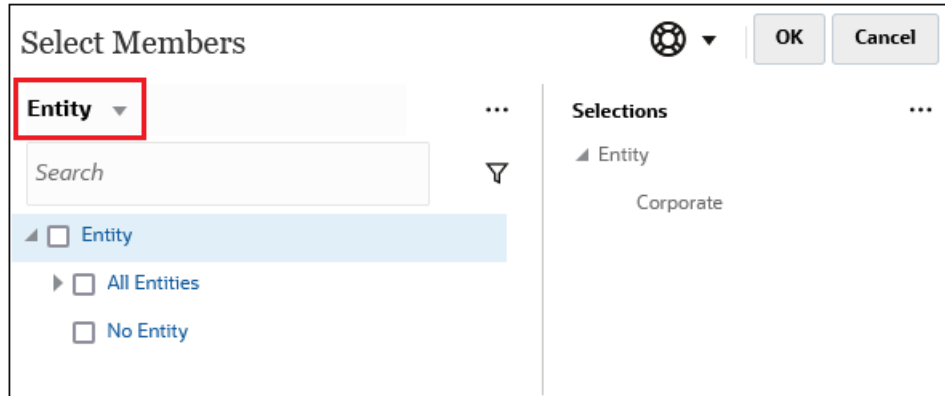


Note:

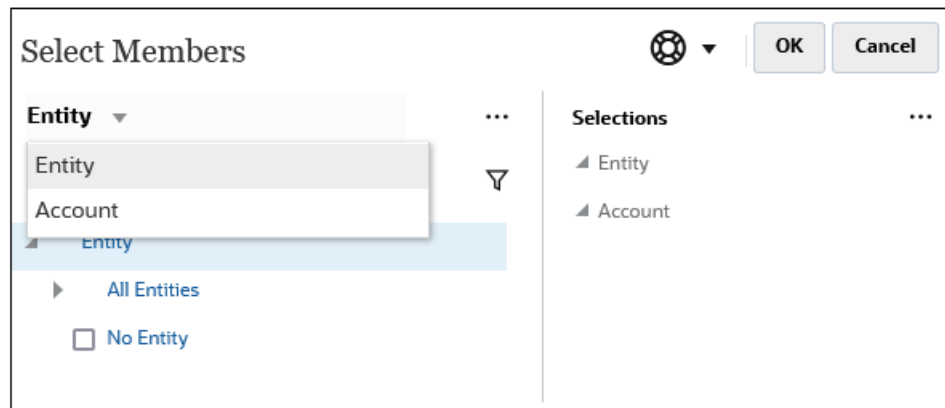
Forms 1.0 and Dashboards 1.0 use a different member selector. See Using the Member Selector in *Administering FreeForm*.

Selecting a Dimension


The dimension for which you are selecting a member is displayed at the top of the **Select Members** dialog box.

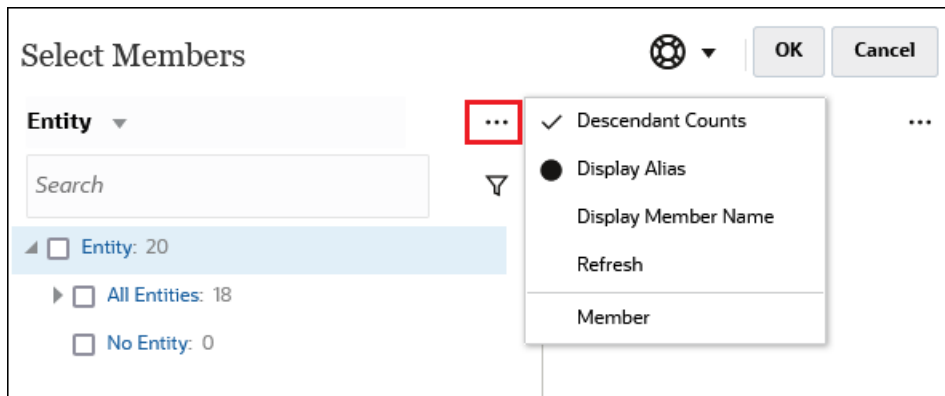


In certain situations you may be able to select a member for more than one dimension. To do this, click the drop-down to select the desired dimension. For example, if you are selecting members for both the Entity and Account dimensions, both Entity and Account are displayed in the drop-down.

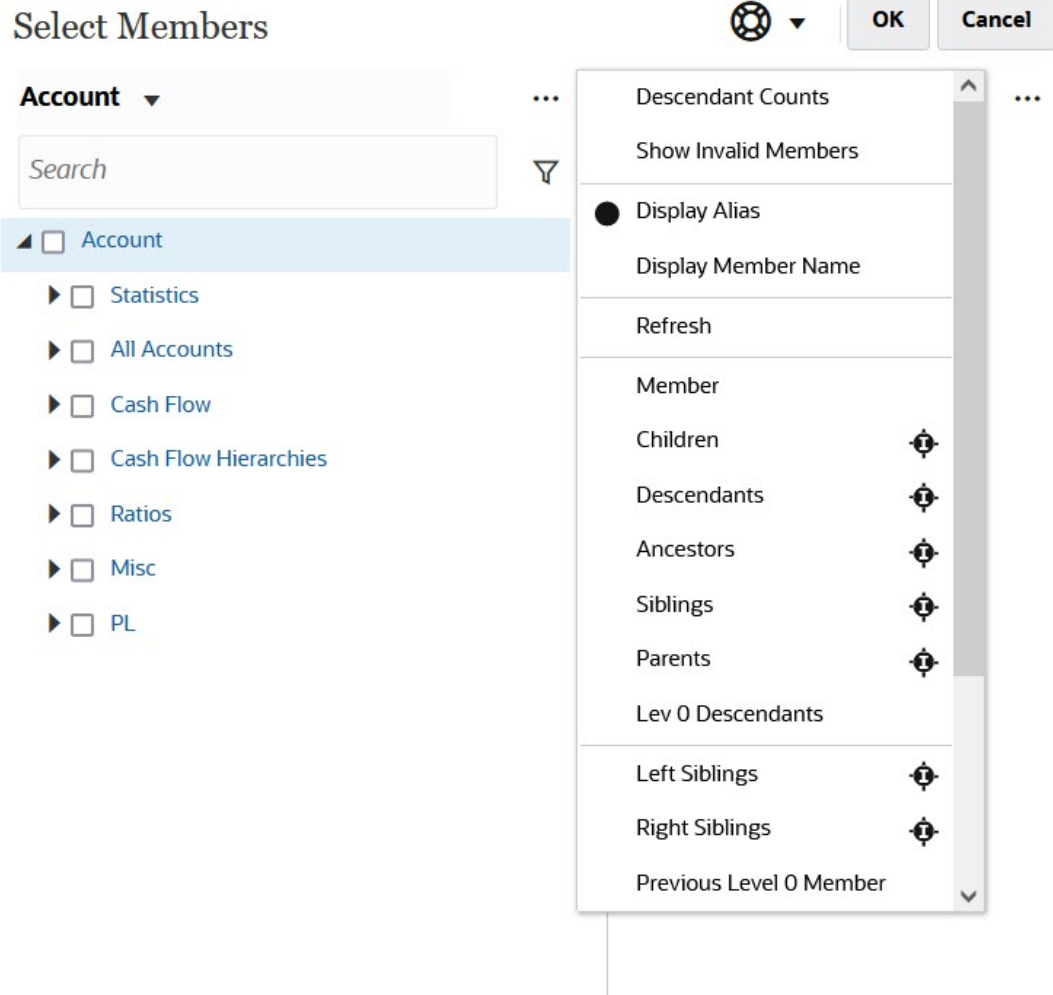


Defining Member Display Options

Click  (Available Items icon) to select whether to display members by alias or by member name, and whether to display the number of descendants for each member.



In some places, additional options are available:

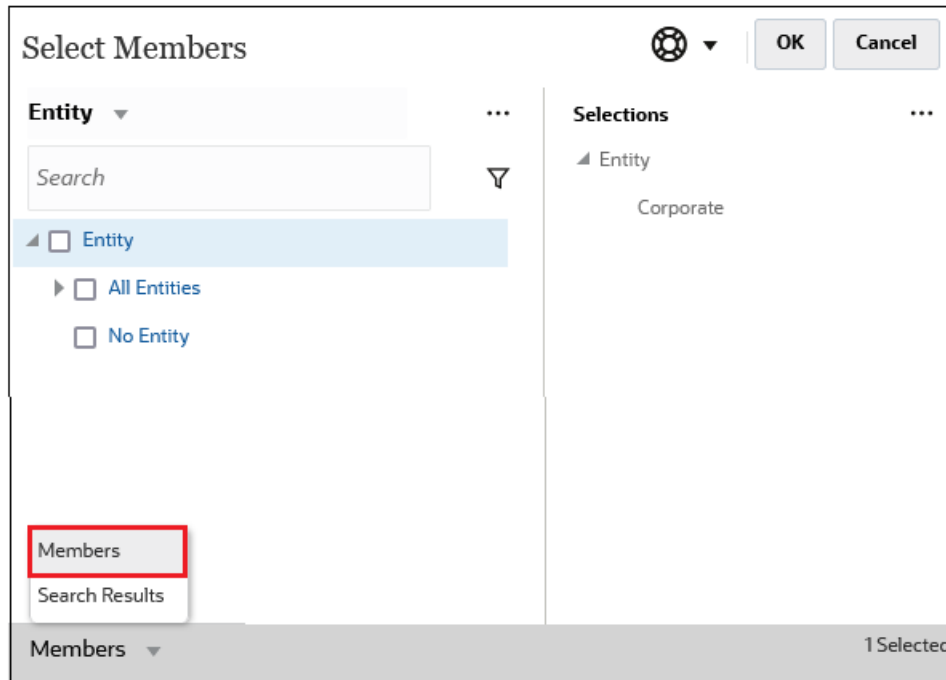


You have the option to **Show Invalid Members**.

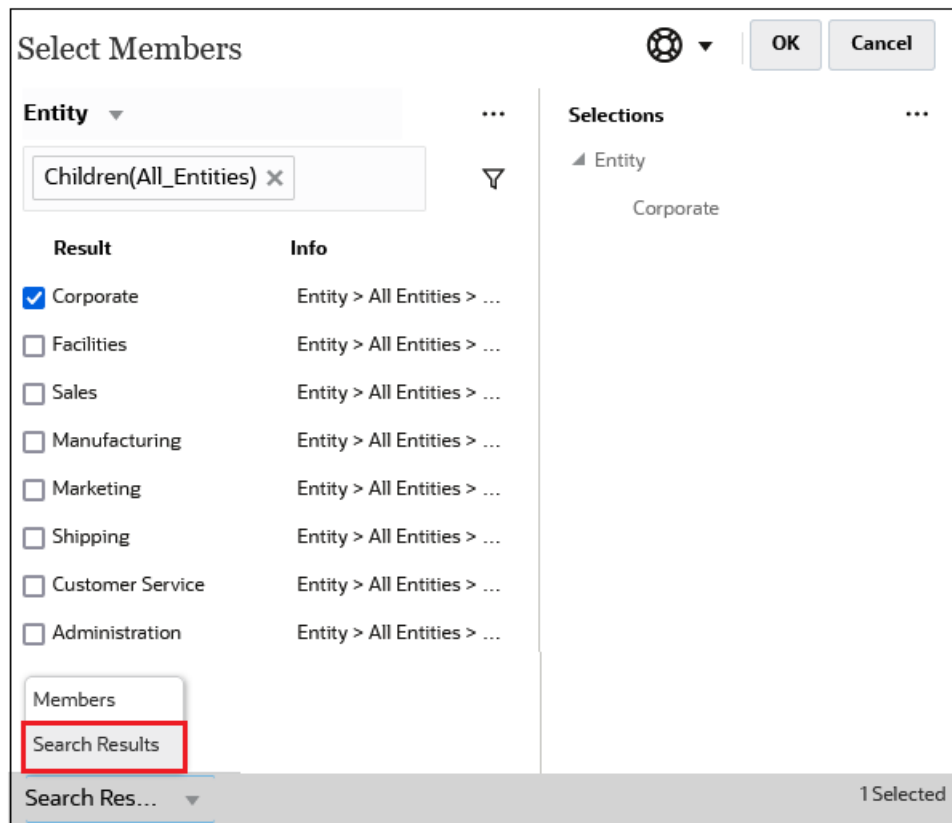
You can also show and select members using member relationships. When you click a member relationship option in the **Available Items** menu, the member or members are moved to the **Selections** pane. For more information about member relationships, see [Member Relationships](#).

To toggle the display between the hierarchy view and the results of any search or filters, select **Members** or **Search Results** at the bottom left of the screen.

Select Members Dialog Box with the Hierarchy View Displayed



Select Members Dialog Box with Search Results Displayed



In some places, you also have the option to toggle the display to show:

- User Variables
- Substitution Variables

- Attributes

 **Tip:**

You can drag the splitter bar between the **Select Members** pane and the **Selections** pane to adjust how the dialog box displays.

Searching for Members

You can search for members in the **Search** field. When searching for a member, you can search for a word, multiple words, or wildcard characters.

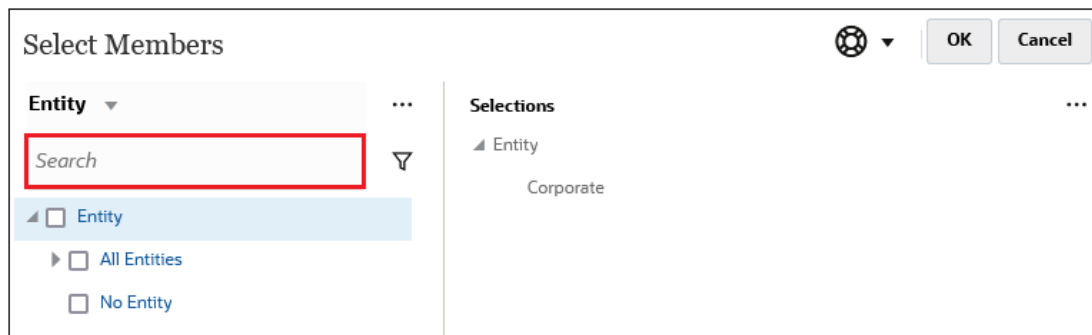
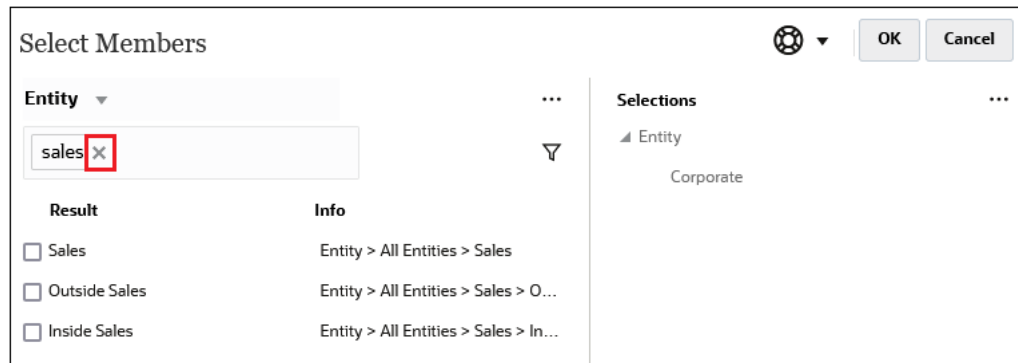




Table 9-1 Valid Wildcard Characters

Wildcard	Description
?	Match any single character
*	Match zero or multiple characters. For example, enter "sale*" to find "Sales" and "Sale" because * includes zero or more characters after the word "sale." The default search uses the * wildcard. For example, entering "cash" searches for "*cash*" and returns "Restricted Cash", "Cash Equivalents", "Cash", and "Noncash Expenses" because the word "cash" appears within each matched item.
#	Match any single number (0-9)
[list]	Match any single character within a specified list of characters. You can list specific characters to use as wildcard. For example, enter [plan] to use all the letters within the brackets as a single wildcard character. You can use the "-" character to specify a range, such as [A-Z] or [!0-9]. To use the "-" character as part of the list, enter it at the beginning of the list. For example, [-@&] uses the characters within the brackets as wildcard characters.
[!list]	Match any single character not found within a specified list of characters. The "-" character can also be used to indicate a range, such as [!A-Z] or [!0-9].

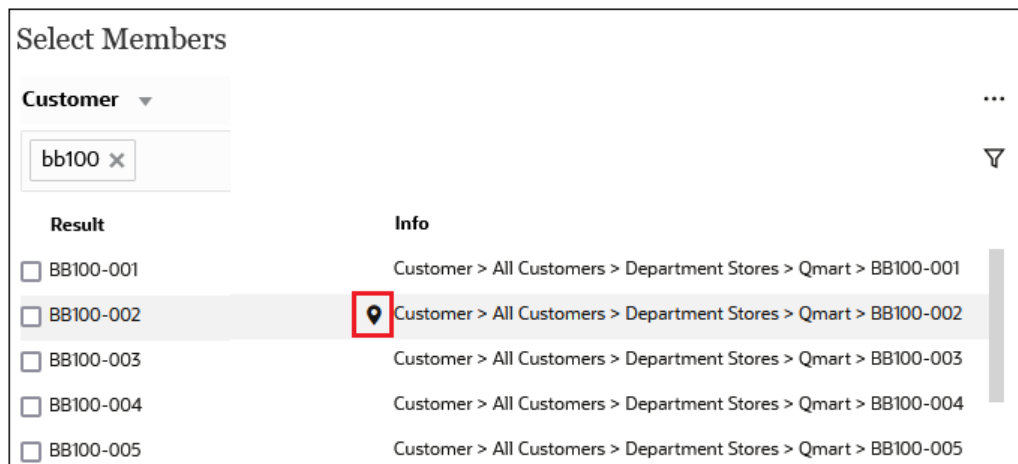
To remove search criteria, click the X next to the search filter.




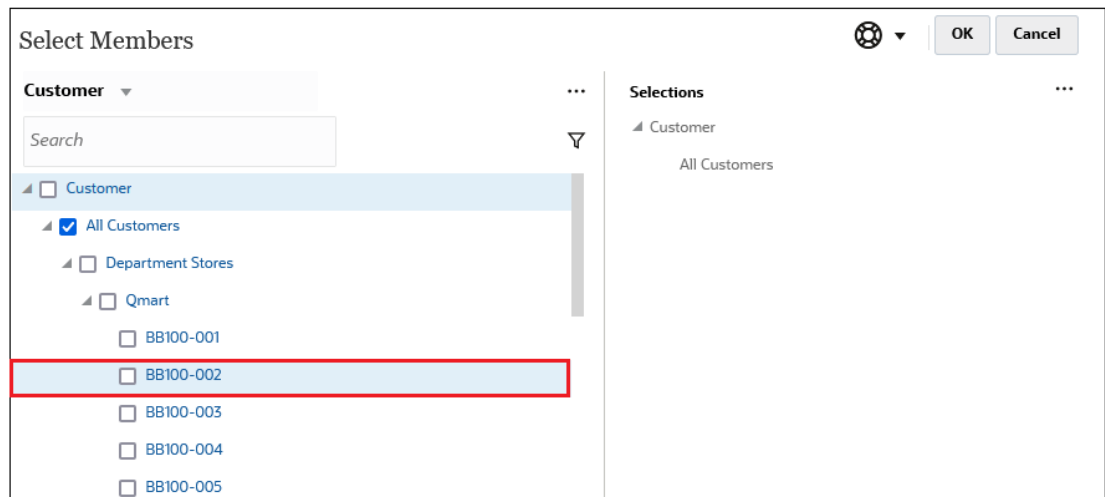
After you perform a search, you can use the Locate Member icon  to find a specific member in the hierarchy. This is very useful if you have a large number of members and you need to work with a particular member in its hierarchy position.

To display the Locate Member icon, highlight a member in the search results. To locate the member in the hierarchy, click  (Locate Member icon) to the left of the highlighted member in the **Info** column.


For example, assume you search for **bb100** in the **Customer** dimension, and then click  on the **BB100-02** line.

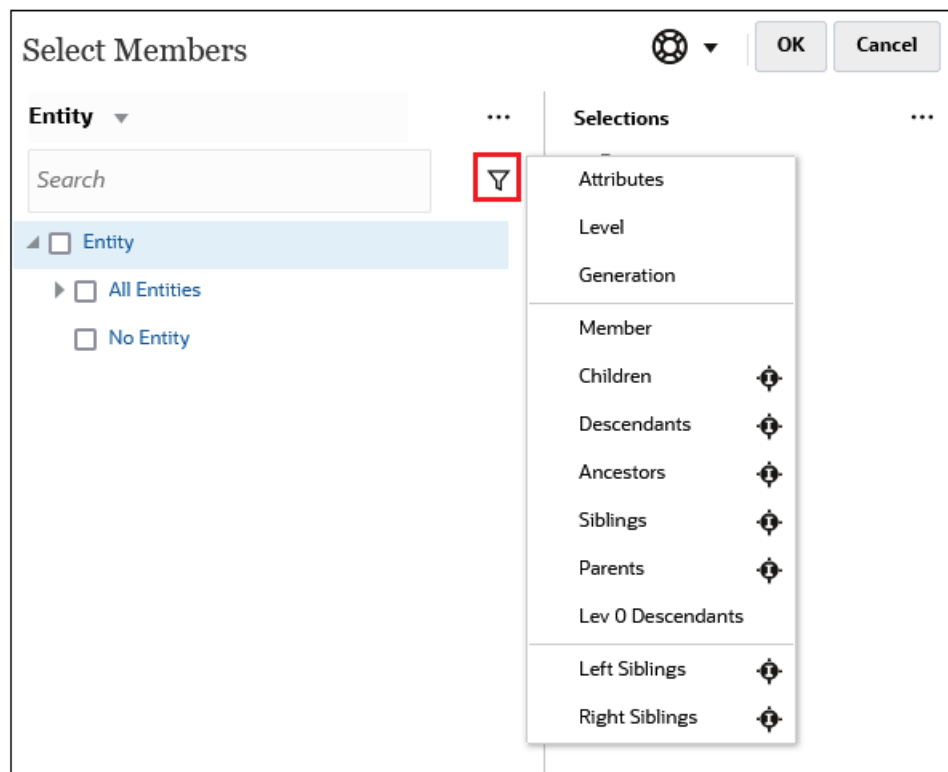


After you click , you are returned to the hierarchy view with **BB100-02** highlighted. At this point, you could select the checkbox next to BB100-02 to move it to the **Selections** pane if desired.



Filtering Which Members Are Displayed


To further filter the members that are displayed, click the Filter icon , and select an option.

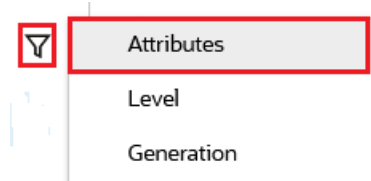


You can filter by a specific attribute, by level, by generation, or by a member relationship.

- [Filtering by Attributes](#)
- [Filtering by Level](#)
- [Filtering by Generation](#)
- [Filtering by Member Relationship](#)

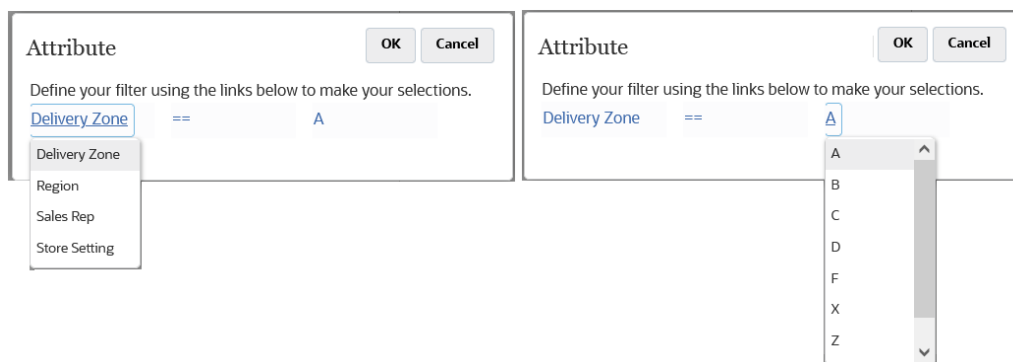
Filtering by Attributes

If attributes are defined, click  and select **Attributes** to filter the members displayed to specific attribute values.

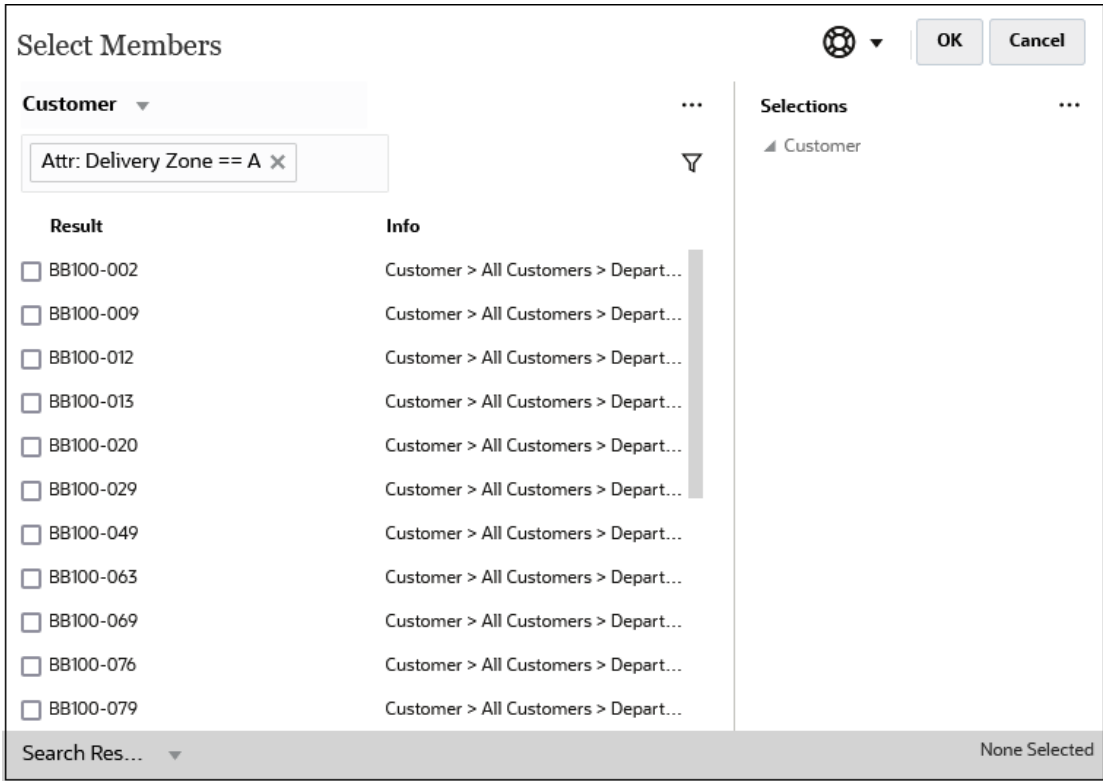


If more than one attribute is defined, click the links in the **Attribute** dialog box to display the available attributes and select the filters. For example, you could filter the results displayed for the **Customer** dimension to **Delivery Zone A**.

Attribute Dialog Box with Delivery Zone and A Selected

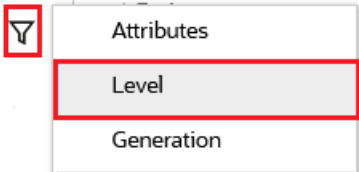


Members for the Customer Dimension Filtered by Delivery Zone A



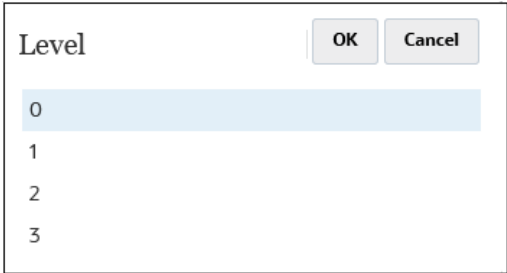
Filtering by Level

To filter the members displayed to a specific level, click , and select **Level**.

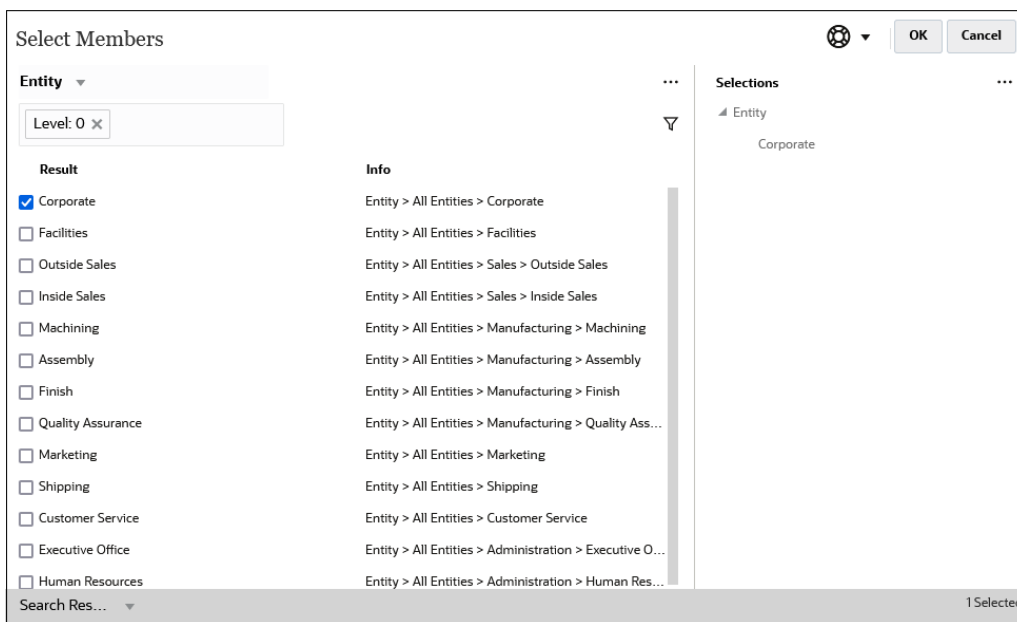


For example, you could filter by **Level 0** members in the **Entity** dimension.


Level Dialog Box with Level 0 Selected

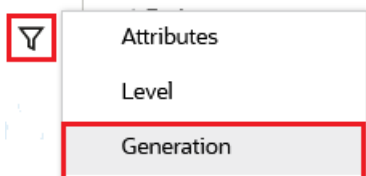


Members for the Entity Dimension Filtered by Level 0



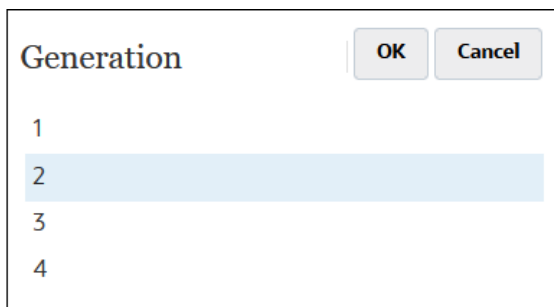
Filtering by Generation

To filter the members displayed to those in a specific generation, click , and select **Generation**.

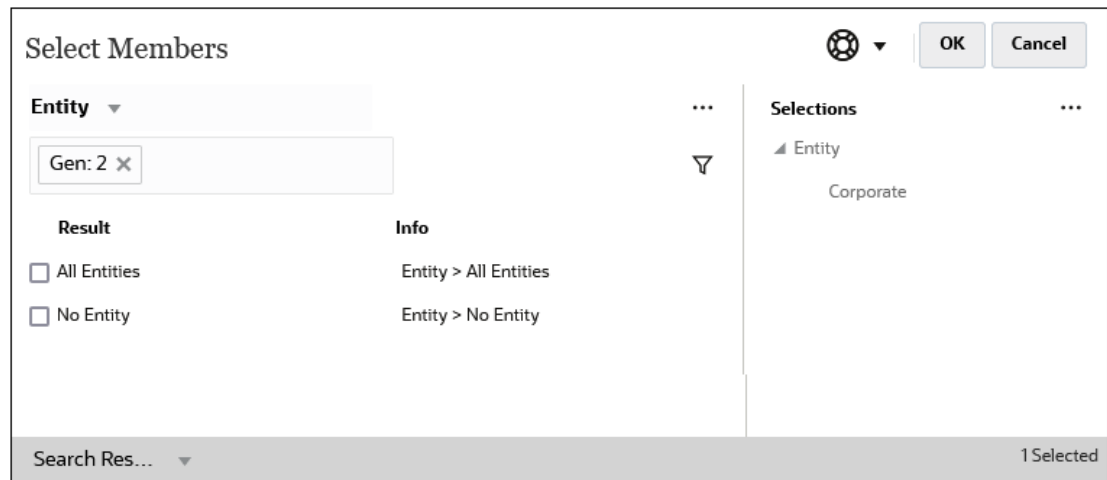


For example, you could filter by **Generation 2** members in the **Entity** dimension.

Generation Dialog Box with Generation 2 Selected



Members for the Entity Dimension Filtered by Generation 2

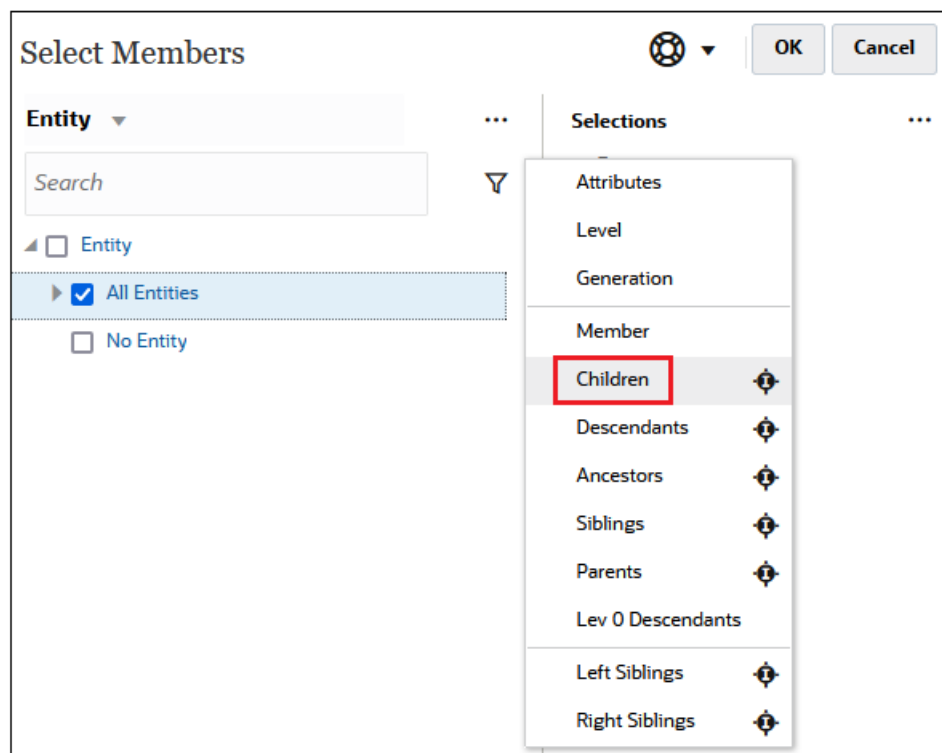


Filtering by Member Relationship

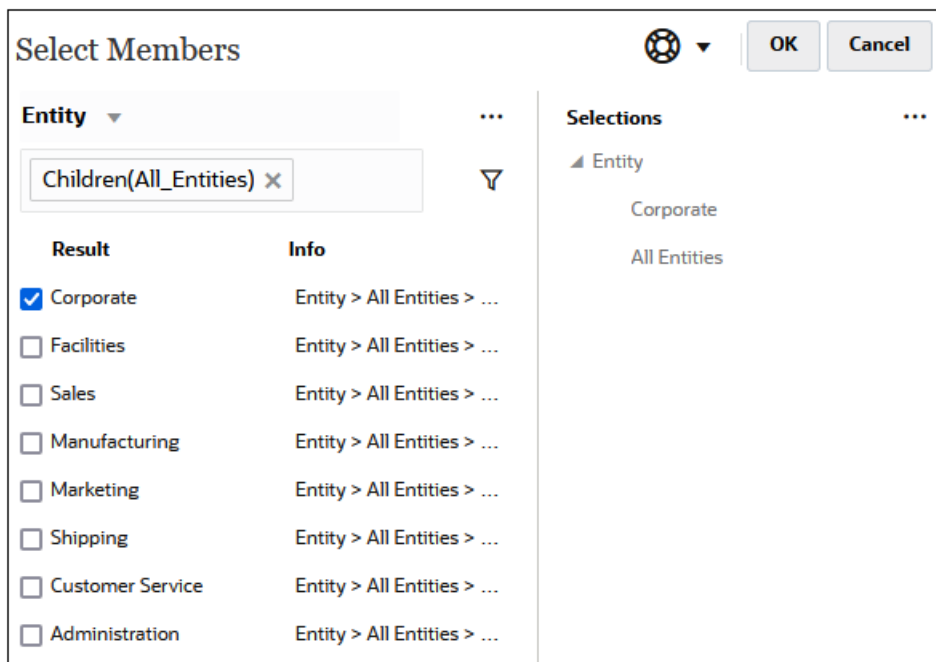
When you filter by member relationship, you can define whether to include the currently-highlighted member in the search results.


- Click the relationship name to select the related members, *excluding the currently-highlighted member*.

For example, assume you select **All Entities**, click , and then select **Children**.

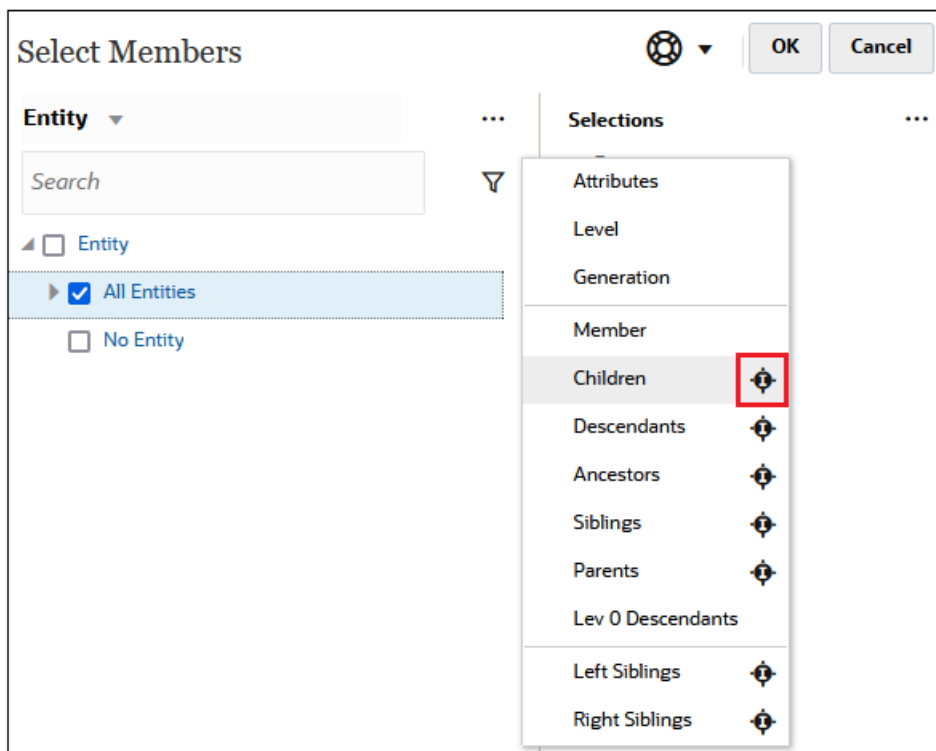


In this case, the children of **All Entities** are included in the filtered results, but *not* the **All Entities** member.

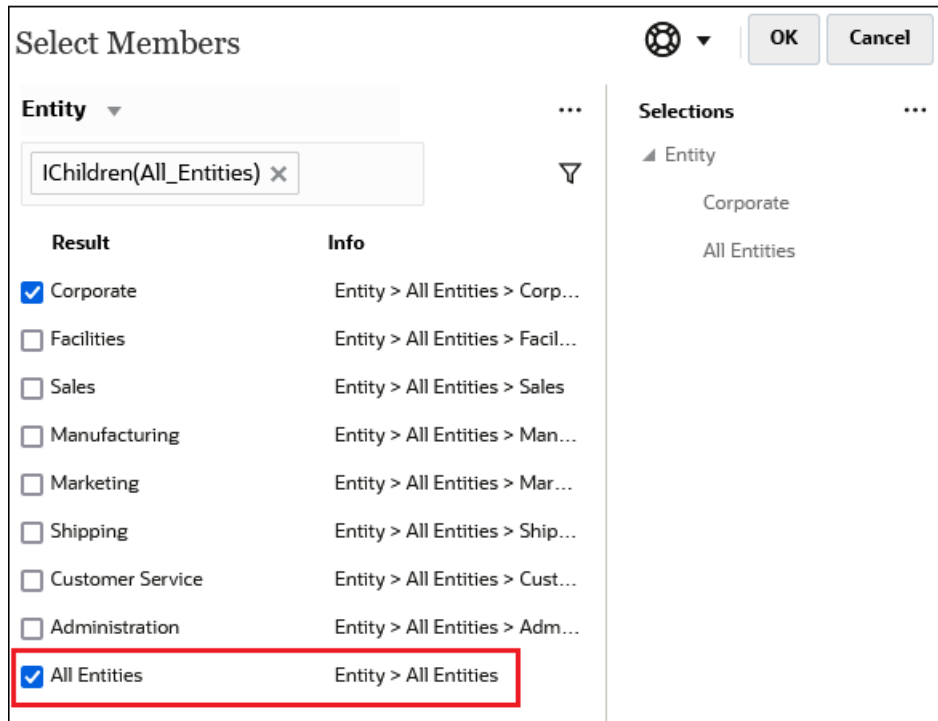


- Click the include icon  to the right of the relationship name to select the related members, *including the currently-highlighted member*.

For example, assume you select **All Entities**, click , and then click  next to **Children**.



In this case, both the children of **All Entities** and the **All Entities** member are included in the filtered results.



 **Note:**
For more information, see [Member Relationships](#).

Member Relationships

This table describes which members and related members are included during filtering and member selection.


Click the include icon  to the right of the relationship name to select the related members, *including the currently-highlighted member*.

Table 9-2 Member Relationships

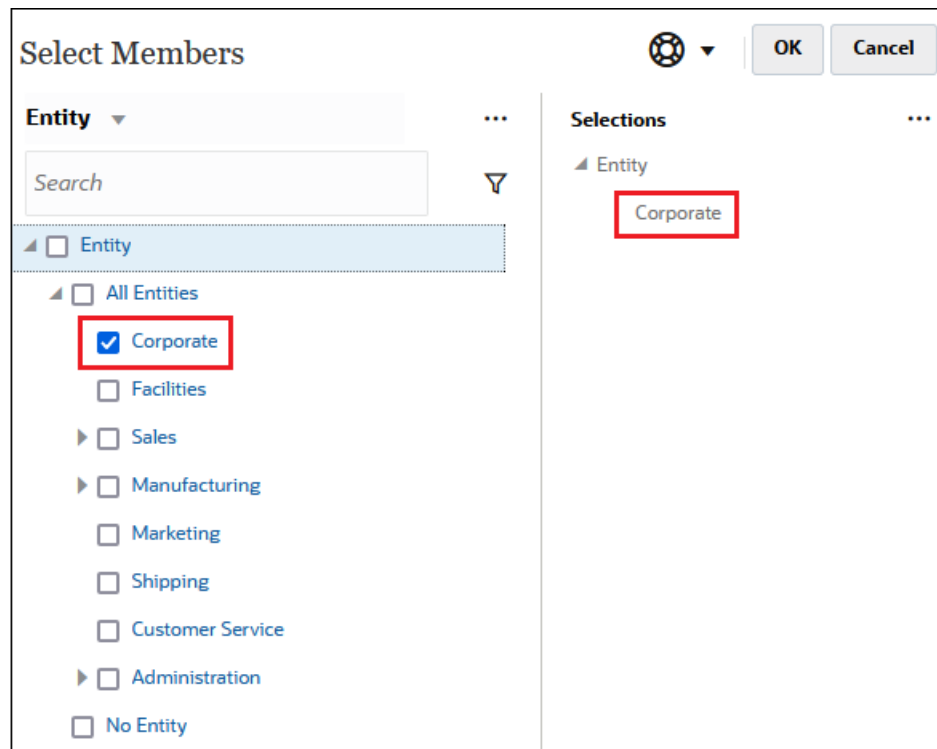
Member	Which Related Members Are Included
Member	The selected member
Children	All members in the level immediately below the selected member
Descendants	All descendants of the selected member, excluding the selected member
Ancestors	All members above the selected member, excluding the selected member
Siblings	All members from the same level in the hierarchy as the selected member, excluding the selected member
Parents	The member in the level above the selected member
Level 0 Descendants	All descendants of the selected member that have no children

Table 9-2 (Cont.) Member Relationships

Member	Which Related Members Are Included
Left Siblings	The members that appear before the selected member with the same parent
Right Siblings	The members that appear after the selected member with the same parent
Previous Level 0 Member	The previous level zero member that appears before the selected member Examples: PrevLvl0Mbr(Jan) returns BegBalance; PrevLvl0Mbr(Jul) returns Jun; PrevLvl0Mbr(BegBalance) returns an empty result
Next Level 0 Member	The next level zero member that appears after the selected member Examples: NextLvl0Mbr(Mar) returns Apr; NextLvl0Mbr(Dec) returns an empty result
Previous Generation Member	The member that appears immediately before the selected member within the same generation
Next Generation Member	The member that appears immediately after the selected member within the same generation
Previous Sibling	The member that appears immediately before the selected member with the same parent
Next Sibling	The member that appears immediately after the selected member with the same parent


Making Member Selections



To select a member, click the checkbox next to the member in the **Select Members** dialog box. The selected member displays a check mark and is moved to the **Selections** pane.



 **Note:**

In certain situations, you are limited on the members you can select.

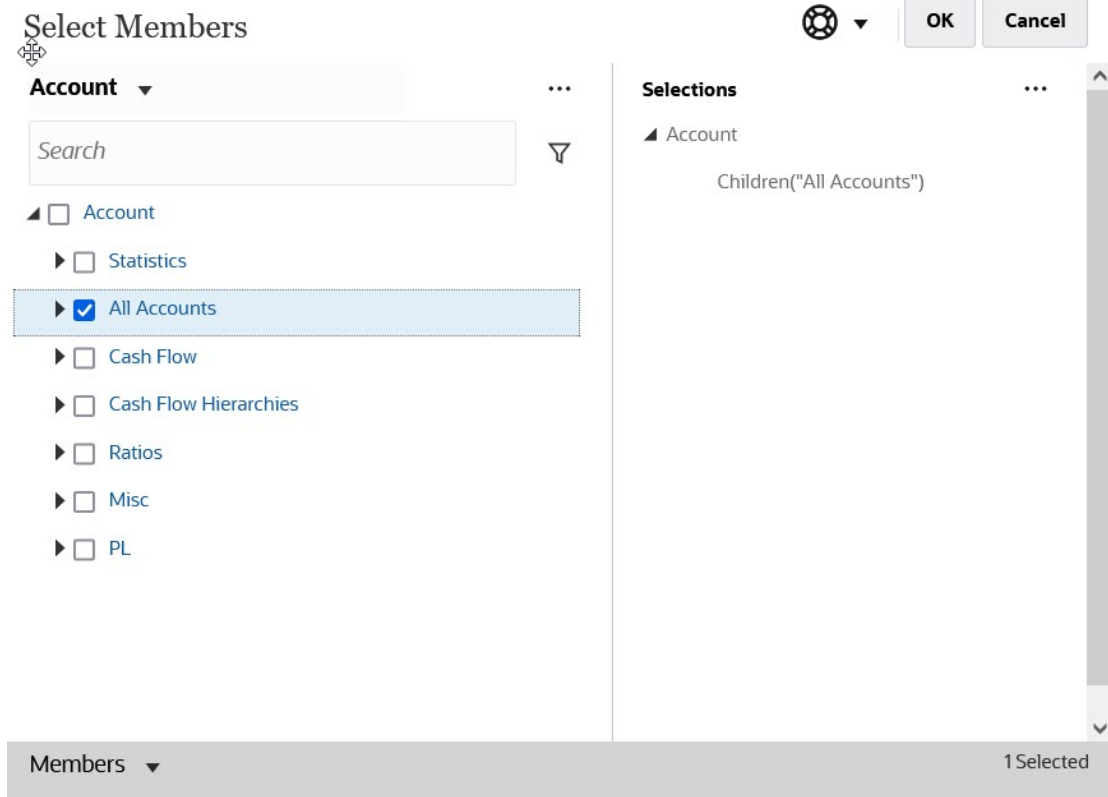
To expand a parent member to see its child members, click the expansion icon  to the left of the parent member name. Clicking the expansion icon will not select the parent member.


In some places, you can use the Function Selector in the **Select Members** pane  to make member selections. Click the Function Selector  next to a member to see the Function Selector menu, and then select a member relationship option.

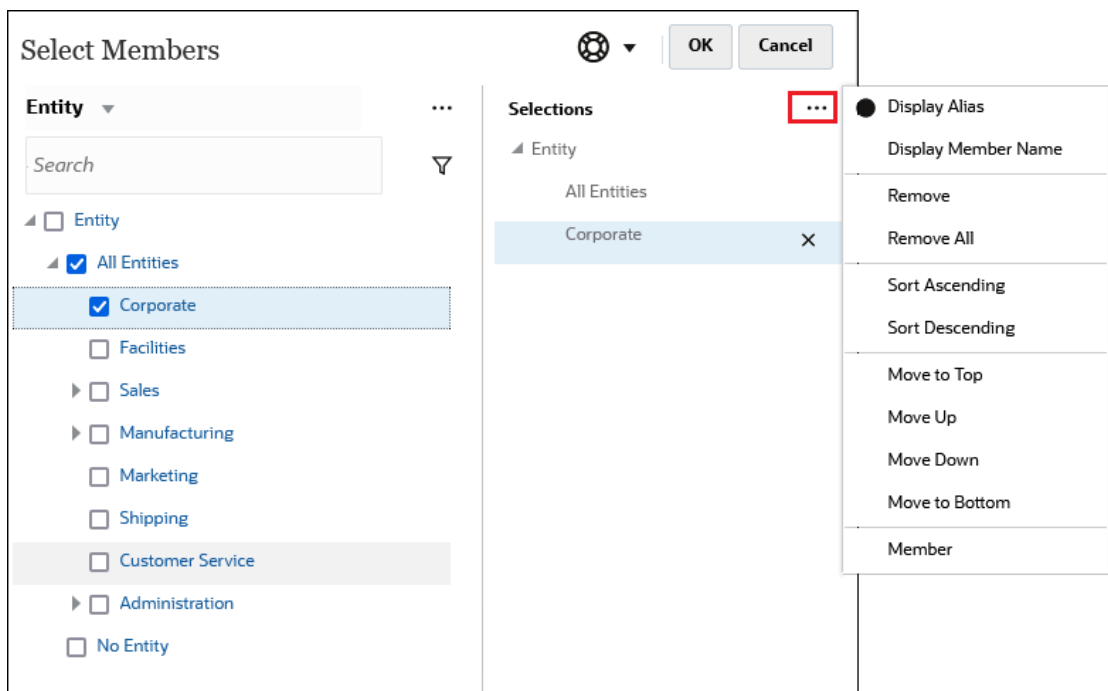
The screenshot shows the 'Select Members' dialog box. On the left, under the 'Account' section, there is a search box and a tree view. The tree view includes 'Account', 'Statistics', 'All Accounts' (highlighted), 'Cash Flow', 'Cash Flow Hierarchies', 'Ratios', 'Misc', and 'PL'. A function selector 'fx' is positioned next to 'All Accounts'. On the right, the 'Selections' section shows a list of options: 'Member', 'Children', 'Descendants', 'Ancestors', 'Siblings', 'Parents', 'Lev 0 Descendants', 'Left Siblings', 'Right Siblings', 'Previous Level 0 Member', 'Next Level 0 Member', 'Previous Generation Member', 'Next Generation Member', 'Previous Sibling', and 'Next Sibling'. The 'Children' option is selected. At the bottom, a table displays member counts for selected accounts.

Members	
7410: Utilities	20,123
7420: Rent Exper	4,305

For example, if you click the Function Selector *fx* next to All Accounts, and then click **Children**, then Children("All Accounts") is added to the **Selections** pane.

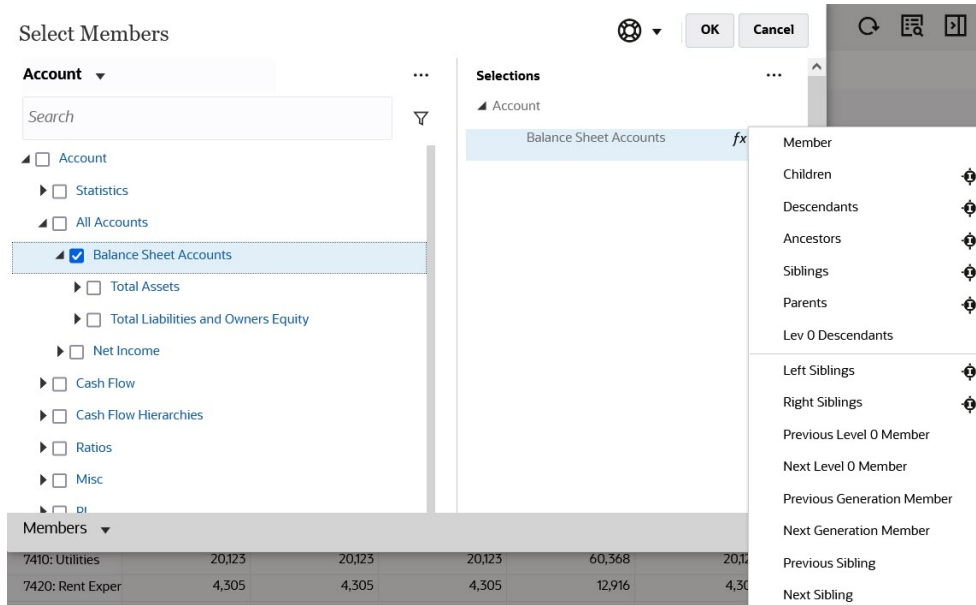



To remove, sort, or move selected members, click  (Selected Items icon) in the **Selections** pane, and select an option. You can also select whether to display the alias or the member name.

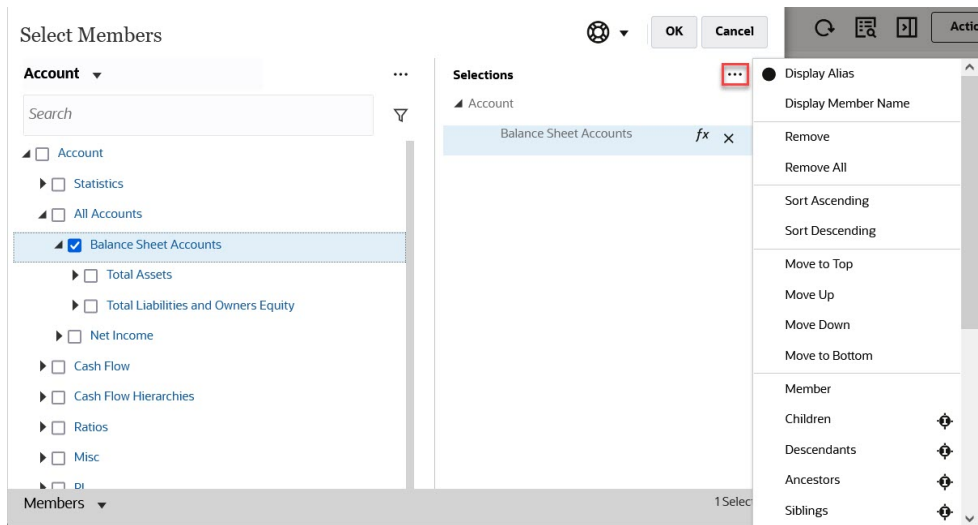


You can add additional members to the **Selections** pane for selected members in several ways:

- Click the Function Selector *fx* next to a selected member to see the Function Selector menu, and then select a member relationship option.



- Select a member in the **Selections** pane, click the **Selected Items** icon , and then click a member relationship option.



For more information about member relationships, see [Member Relationships](#).

10

Adjusting and Spreading Data

Related Topics

- [Adjusting Cell Values](#)
FreeForm offers a number of ways to adjust cell values quickly.
- [Performing What If Analysis](#)
Before you commit data by saving it, you can perform "what if" calculations and review the changes.
- [Spreading Data for Time Periods](#)
While working in forms, you can spread, or distribute, values, as described here.
- [Spreading Values Using Grid Spread](#)
If your administrator has enabled **Grid Spread** as a form property, you can specify an amount or percentage by which values across multiple dimensions on the form are increased or decreased, based on the existing values in the target cells.
- [Spreading Values Using Allocations](#)
Using **Allocate**, you can mass allocate data to multiple cells, even across dimensions.

Adjusting Cell Values

FreeForm offers a number of ways to adjust cell values quickly.

You can increase or decrease values by a specific amount or by a percentage. You can also enter operators and commands in a cell. See [Performing What If Analysis](#) and [Entering Data Quickly Using Commands](#).

Performing What If Analysis

Before you commit data by saving it, you can perform "what if" calculations and review the changes.

By experimenting with data, you can see the impact of various scenarios before saving the data, which is useful for manipulating values to produce the results you want.

You can manipulate data values by:

- Entering values (see [Entering Data Quickly Using Commands](#)).
- Locking a value during spreading (see [Locking Cells](#)).
- Changing values by typing an operator, followed by a number, described here.
- Using ad hoc functionality in FreeForm and Oracle Smart View for Office (see [Using Ad Hoc for Data Entry and Analysis](#)).

To perform quick calculations on a value:

1. Select the cell to perform a calculation on.
2. Enter an operator (+, +-, *, /, or %), and then enter a value.

3. Move the cursor from the cell.
A color change indicates a modified cell.

Spreading Data for Time Periods

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

You can:

- Spread the value in a summary time period back to its base time periods, or to the first parent or first child of its parent time period
- Spread values among children and parents proportionally, based on existing distribution
- Spread values based on a calendar's weekly distribution in a quarter, which could be 4-4-5, 5-4-4, 4-5-4, or None
- Fill the parent's value to all its descendants
- Temporarily lock certain cell values while spreading data over time periods (see [Locking Cells](#))

You can select, copy, paste, or adjust multiple values. If you paste data to time periods, FreeForm applies the spreading rules for each cell in succession, starting from left to right and top to bottom. The data resulting from a paste operation may not match the original copied data. See [How Spreading Data Works](#).



Note:

- You can't spread data in a summary time period that includes members with mixed currencies.
- Values for summary time periods are automatically spread, even if the form uses an alternate hierarchy for Period, so ensure that the spread results are correct. Oracle recommends against entering data into alternate hierarchy members, because the values could spread incorrectly.

To spread data for time periods:

1. In a form, put the cursor in the cell with the value to spread.
2. Enter the value.
The value is distributed according to the rules described in [How Spreading Data Works](#).
3. Click **Save**.

How Spreading Data Works

Factors such as account type, the **Time Balance** property, existing distribution, member hierarchies, and data type affect how values are distributed, assuming that no data cells are locked.

For information on locking cells, see [Locking Cells](#).



Note:

Date and text values are excluded when spreading data.

The following table shows examples of the effect on data of entering or changing a currency or non-currency value:

Table 10-1 Examples: The Effect on Data of Entering or Changing a Currency or Non-currency Value

Time Balance Property of the Account	New Value Distribution	Examples
FLOW Revenue, Expense, Saved Assumption (where the Time Balance property is set to Flow)	<p>To all its children and its parents proportionally, based on the existing distribution. The value affects the entire Summary Period Rollups hierarchy so that the parent time period is the sum of its children.</p> <p>If no distribution exists (that is, the values for all the children are zeros or are missing), and the changed value is a Quarter, the value spreads down proportionally, based on the weekly distribution (which can be 4-4-5, 4-5-4, 5-4-4, or evenly distributed if the account's spreading is set to None).</p> <p>If the changed parent is a Year Total or some other kind of summary time period, the value is spread evenly.</p>	<p><u>Example 1</u></p> <p>You change Qtr 1 from 250 to 500, with these current values for its months:</p> <ul style="list-style-type: none"> Jan = 100 Feb = 50 Mar = 100 <p>Result: 500 is distributed to its children proportionally, replacing their previous values with:</p> <ul style="list-style-type: none"> Jan = 200 Feb = 100 Mar = 200 <p>The increment of 250 is aggregated to the parents of Qtr 1. If Year Total was 1000, its new value is 1250.</p> <p><u>Example 2</u></p> <p>You change March from 100 to 200.</p> <p>Result: March, Qtr 1, and Year Total all increment by 100. Jan and Feb remain unchanged.</p>

Table 10-1 (Cont.) Examples: The Effect on Data of Entering or Changing a Currency or Non-currency Value

Time Balance Property of the Account	New Value Distribution	Examples
<p>FIRST All types of Accounts</p>	<p>Upward to its first parent and downward to its child only if the changed cell is the first child of its parent time period. The summary time period equals the first of its child time periods. If no distribution exists (that is, values for all children are zeros or are missing), the value is copied to each of the children.</p>	<p><u>Example</u> You change Qtr 1 from 20 to 40, with these current values for its months:</p> <ul style="list-style-type: none"> • Jan = 20 • Feb = 15 • Mar = 05 • Q1 = 20 <p>Result: 40 is distributed to its children, replacing their previous values with:</p> <ul style="list-style-type: none"> • Jan = 40 • Feb = 15 • Mar = 05 • Q1 = 40
<p>BALANCE Asset, Liability, Equity, Saved Assumption (where the Time Balance property is set to Balance)</p>	<p>Downward to its last child and upward to its parent only if the changed cell is the last child of its parent time period. The summary time period equals the last of its child time periods. If no distribution exists (that is, the values for all children are zeros or are missing), the value is spread across its children.</p>	<p><u>Example 1</u> You change Qtr 1 from 30 to 50. Result: March also changes to 50. Jan and Feb don't change. Year Total does not change because Qtr 1 is not its last child.</p> <p><u>Example 2</u> You change Qtr 4 from 100 to 50. Result: Dec changes to 50 because it is Qtr 4's last child. Oct and Nov remain unchanged, as do Qtrs 1, 2, and 3. Year Total changes to 50 because Qtr 4 is its last child.</p> <p><u>Example 3</u> You change Qtr 2 to 100 with these current values:</p> <ul style="list-style-type: none"> • Apr = 0 • May = 0 • June = 0 <p>Result:</p> <ul style="list-style-type: none"> • Apr = 100 • May = 100 • June = 100 <p>Year Total is unchanged.</p>

Table 10-1 (Cont.) Examples: The Effect on Data of Entering or Changing a Currency or Non-currency Value

Time Balance Property of the Account	New Value Distribution	Examples
<p>AVERAGE</p> <p>Revenue, Expense, Saved Assumption, (where the Time Balance property is set to Average)</p>	<p>To all its children and its parents proportionally, based on the existing distribution. The value affects the entire Summary Time Period Rollups hierarchy so that the parent is the average of its children.</p> <p>Assumes an equal number of days in each period, such as 30 days for each month.</p>	<p><u>Example</u></p> <p>You change Qtr 1 from 5 to 10 with these current values:</p> <ul style="list-style-type: none"> • Jan = 05 • Feb = 10 • Mar = 00 • Q1 = 05 <p>Result:</p> <ul style="list-style-type: none"> • Jan = 10 • Feb = 20 • Mar = 00 • Q1 = 10
<p>FILL</p> <p>All types of Accounts</p>	<p>The value set at the parent is filled into all its descendants.</p>	<p><u>Example</u></p> <p>You change YearTotal from 100 to 200.</p> <p>Result:</p> <p>Values for Q1, Q2, Q3, Q4 and all months are changed to 200</p> <p>Consolidation operators and member formulas overwrite FILL values when the members are recalculated.</p>
<p>Weighted Average - Actual_365</p> <p>Revenue, Expense, Saved Assumption, (where the Time Balance property is set to Average)</p>	<p>Weighted daily average based on 365 days in a year, assuming that February has 28 days. This does not account for leap years.</p> <p>About Weighted Average - Actual_365:</p> <ul style="list-style-type: none"> • You can't customize month labels, although you can use aliases. • Years must have 12 months, and quarters must be the sum of three base months. • You can't change the fiscal start month after FreeForm is set up. • All months are included in the calculation. #MISSING is treated as 0 in the numerator, and all the days are included in missing months in the denominator. This means, for example, that QTR means three months, not QTD, and Total Year means all 12 months, not YTD. 	<p><u>Example</u></p> <p>You enter values for Jan, Feb, and Mar. For any year, including leap years, February is assumed to have 28 days, and Q1 is assumed to have 90 days.</p> <p>Value Entered and Number of Days</p> <ul style="list-style-type: none"> • Jan = 9,000 31 days • Feb = 8,000 28 days • Mar = 8,000 31 days • Q1 = 90 days (the total days for Jan, Feb, and Mar) <p>Result:</p> <p>Q1 = 8,344</p> <p>The average for Q1 is calculated thus: (1) Multiply the value for each month in Q1 by the number of days in that month, (2) Sum these values, and (3) Divide the total by the number of days in Q1. Using 28 for the number of days in Feb, and 90 for the number of days in Q1, the result is: (9,000 times 31 plus 8,000 times 28 plus 8,000 times 31) divided by 90 = 8,344.</p>

Table 10-1 (Cont.) Examples: The Effect on Data of Entering or Changing a Currency or Non-currency Value

Time Balance Property of the Account	New Value Distribution	Examples
Weighted Average - Actual_Actual Revenue, Expense, Saved Assumption , (where the Time Balance property is set to Average)	Weighted daily average based on the actual number of days in a year. This accounts for leap years, in which February has 29 days. About Weighted Average - Actual_Actual: <ul style="list-style-type: none"> • You can't customize month labels, although you can use aliases. • Years must have 12 months, and quarters must be the sum of three base months. • You can't change the fiscal start month after FreeForm is set up. • All months are included in the calculation. #MISSING is treated as 0 in the numerator, and all the days are included in missing months in the denominator. This means, for example, that QTR means three months, not QTD, and Total Year means all 12 months, not YTD. • This time balance property is only supported for dimensions bound to a block storage cube. Aggregate storage cubes do not support the Weighted Average - Actual_Actual time balance property. 	<p><u>Example 1</u></p> <p>For a leap year, you enter values for Jan, Feb, and Mar. February is assumed to have 29 days, and Q1 is assumed to have 91 days.</p> <p>Value Entered and Number of Days</p> <ul style="list-style-type: none"> • Jan = 9,000 31 days • Feb = 8,000 29 days • Mar = 8,000 31 days • Q1 = 91 days (the total days for Jan, Feb, and Mar) <p>Result: Q1 = 8,341</p> <p>The average for Q1 is calculated thus: (1) Multiply the value for each month in Q1 by the number of days in that month, (2) Sum these values, and (3) Divide the total by the number of days in Q1. Using 29 for the number of days in Feb, and 91 for the number of days in Q1, the result is: (9,000 times 31 plus 8,000 times 29 plus 8,000 times 31) divided by 91 = 8,341.</p> <p><u>Example 2</u></p> <p>For a non-leap year, you enter values for Jan, Feb, and Mar. February is assumed to have 28 days, and Q1 is assumed to have 90 days.</p> <p>Value Entered and Number of Days</p> <ul style="list-style-type: none"> • Jan = 9,000 31 days • Feb = 8,000 28 days • Mar = 8,300 31 days • Q1 = 90 days (the total days for Jan, Feb, and Mar) <p>Result: Q1 = 8,344</p> <p>Using 28 for the number of days in Feb, and 90 for the number of days in Q1, the result is: (9,000 times 31 plus 8,000 times 28 plus 8,000 times 31) divided by 90 = 8,344.</p>

Table 10-1 (Cont.) Examples: The Effect on Data of Entering or Changing a Currency or Non-currency Value

Time Balance Property of the Account	New Value Distribution	Examples
CUSTOM	Spreading is disabled and the application designer is expected to add customized spreading. For instance, you can feed a value into the period total (Q1) using Groovy rules and it will calculate the summary time periods using the Flow method.	NA
DISABLE	Spreading is disabled and the summary time period is read-only. Disable prevents data from being entered on non-level zero periods. The Flow method is used to aggregate into the period total (Q1), but it won't spread down to the summary time periods.	NA

**Note:**

The **Skip** option does not apply to data spreading but affects only the calculation of the member hierarchy.

If you change a percentage:

Regardless of account type, existing distribution, or 4-4-5 setting, the value is spread evenly across its children. If the changed cell is the last child of its parent time period, the value is copied upward to its parent.

Example 1

You change Qtr 1 from 10 to 20.

Result: Jan, Feb, and Mar also change to 20. However, Year Total does not change because Qtr 1 is not its last child.

Example 2

You change Feb from 10 to 20.

Result: Jan and Mar do not change because neither one is a child or parent of Feb. Qtr 1 (and therefore Year Total) does not change because Feb is not its last child.

Example 3

You change Qtr 4 from 30 to 20.

Result: Oct, Nov, and Dec also change to 20 because the value is copied to Qtr 4's children. Year Total also changes to 20 because Qtr 4 is its last child.

**Note:**See [Adjusting Cell Values](#).

Locking Cells

When spreading or manipulating data, you can temporarily lock cells while FreeForm calculates and fills in other values.

You can review the changes before saving them. See [Examples of Spreading Data with Cell Locking](#).

To temporarily lock values:

1. Select the cells to lock.
2. Click **Data**, and then **Lock**.

A lock icon indicates that a cell is locked. If you lock multiple cells, some of which are already locked, all the unlocked cells become locked.

You can now spread or manipulate the other data. (See [Spreading Data for Time Periods](#) and [How Spreading Data Works](#).)

3. To unlock cells, click **Lock** again.

Clicking **Lock** unlocks all cells in a group only if they were all locked (or were read-only for another reason). When you save the data, locked cells become unlocked.

Examples of Spreading Data with Cell Locking

To learn how data is spread when cells are locked, see these examples.

Example 1

Before locking and spreading, Account A has these values:

	Jan	Feb	Mar	Q1
Account A	100	100	100	300

You then lock the Feb and Mar values at 100 and change Q1 from 300 to 600. Because Jan, Feb, and Mar must now total 600, and Feb and Mar are locked at 100 each, FreeForm calculates Jan to be 400 and fills in that value:

	Jan	Feb	Mar	Q1
Account A	400	100	100	600

Example 2

Before locking and spreading, Account B has these values:

	Q1	Q2	Q3	Q4	YearTotal
Account B	100	100	100	100	400

You then lock Q1 and Q2 values at 100 each and change Year Total from 400 to 800. Because the yearly total must equal 800, and Q1 and Q2 are locked at 100 each, Q3 and Q4 are calculated to be 300 each:

	Q1	Q2	Q3	Q4	YearTotal
Account B	100	100	300	300	800

Spreading Values Using Grid Spread

If your administrator has enabled **Grid Spread** as a form property, you can specify an amount or percentage by which values across multiple dimensions on the form are increased or decreased, based on the existing values in the target cells.



You immediately see the result in the form and can save the new data or discard it. When calculating the spread data, FreeForm ignores read-only and locked cells and cells that have Supporting Detail. Data integrity is ensured by spreading values only to cells you have write permission to.



Note:

The **Time Balance** property setting affects how data is spread with the **Fill** option. See [How Spreading Data Works](#).

To spread values using **Grid Spread**:

1. Place the cursor in the Subtotal or Total source cell whose value you want to spread to target cells.
2. Click **Data**, and then **Spread**.
3. In **Adjust By**, enter the change factor:
 - To change values by a specified amount, click . Precede the value by a minus sign to decrease the value.
 - To change values by a percentage, click .
4. Click a spreading pattern:
 - **Proportional spread**: Spreads the value proportionally, based on the existing values in the target cells (default).
 - **Evenly split**: Spreads the value evenly among the target cells.
 - **Fill**: Replaces the value in all target cells.
5. Click **Apply**.

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

- Click **Save**.

Spreading Values Using Allocations

Using **Allocate**, you can mass allocate data to multiple cells, even across dimensions.

Notes:

- You can't undo a mass allocation of values.
- The **Time Balance** property setting affects how data is spread with the **Fill** option. See [How Spreading Data Works](#).

If your administrator assigned the Mass Allocate role to you and selected the **Enable Mass Allocate** property for your forms, you can spread data using **Allocate**. You can allocate data to all the source cell's descendants, allocate across multiple dimensions, and spread data even to cells not displayed on the form. In fact, you need not have write permission to the target cells.

To spread values using **Allocate**:



- Place the cursor in the Subtotal or Total cell whose value you want to spread.
- Click **Data**, and then **Allocate**.
- In **Adjust By**, enter the change factor:
 - To change values by a specified amount, click . Precede the value by a minus sign to decrease the value.
 - To change values by a percentage, click .
- Click **Spread Type** for allocating the specified value or percentage across the target cells, as described in the following table.

Table 10-2 Spread Types for Allocate

Spread Type	Description
Proportional Spread	Spreads the value proportionally, based on the existing values in the target cells (the default).
Relational Spread	Spreads into the selected cells, based on values in a different source location. Selecting this option displays the currently selected members for each dimension in the Selected column. Under Relative , select the members that identify the base values to be spread, creating a pattern based on the existing values in the relative cells. To select members, use the Member Selector . See Working with Members in <i>Administering FreeForm</i> .
Evenly Split	Spreads the value evenly among the target cells.
Fill	Replaces the value in all target cells.

- Click **Spread**.

11

Working with Supporting Detail

Related Topics

- [About Using Supporting Detail](#)
If you want to build logic into how a cell value is calculated, you can use the built-in calculator, called **Supporting Detail**, to develop that value and save your assumptions behind the value.
- [More About Supporting Detail](#)
Supporting Detail helps you build and understand the assumptions behind data in a form.
- [Adding Supporting Detail](#)
Use **Supporting Detail** to set how detail items aggregate to cell values.
- [Pasting Multiple Cells into the Supporting Detail Window](#)
You can copy Supporting Detail from multiple cells in Microsoft Excel or another product and paste it into the **Supporting Detail** window.

About Using Supporting Detail

If you want to build logic into how a cell value is calculated, you can use the built-in calculator, called **Supporting Detail**, to develop that value and save your assumptions behind the value.

For example, say you want to plan for—using your own logic—the travel expenses for an upcoming quarter. This example shows how you could use **Supporting Detail** to plan travel expenses:

Supporting Detail

	Operator	FY13 Jul	FY13 Aug	FY13 Sep
<input type="checkbox"/> AirFare	+	2400.0	3600.0	6000.0
CustomerVisits	+	2.0	3.0	5.0
AverageRate	*	1200.0	1200.0	1200.0
<input type="checkbox"/> Hotel	+	450.0	900.0	1500.0
NumberOfNights	+	3.0	6.0	10.0
RatePerNight	*	150.0	150.0	150.0
Total		2850.0	4500.0	7500.0

You can include text, numbers, and operators that define how data is calculated. See [Adding Supporting Detail](#).

More About Supporting Detail

Supporting Detail helps you build and understand the assumptions behind data in a form.

For example, you can add Supporting Detail for Pens: ballpoint, fountain, marker, and so on. The Pen member can then display the total for all pen types.

About Supporting Detail:

- Cells with Supporting Detail have a teal background.
- Supporting Detail does not add members to the form or change its organization.
- You must have write permission to cells that you create Supporting Detail for.
- To protect the Supporting Detail, the aggregate values in cells having Supporting Detail are read-only.
- You can add Supporting Detail to target and bottom-up versions.
- You can add Supporting Detail only to base time periods (level-0 members). You can't add Supporting Detail to Summary Time Periods, such as Quarters.
- Number and precision formatting is not reflected in the **Supporting Detail** window.
- The sequence of operators follows the same logic as is used to process multiple operators in a complex calculation. See [Order of Supporting Detail](#).
- You can print Supporting Detail.
- Your administrator can use the Copy Versions functionality to copy Supporting Detail from one version to another.
- Your administrator can copy data, including Supporting Detail, from one dimensional intersection to another. For example, administrators can copy *Budget, FY19, Final to Forecast, FY20, First Draft*.



Adding Supporting Detail

Use **Supporting Detail** to set how detail items aggregate to cell values.

To work with supporting detail:

1. Select the cell or cells you want to add supporting detail to.

You can select contiguous cells in a row or column, but can't include a combination of rows and columns. Select cells that are in the local or input currency so that you can write to them.

2. Click  , click  , and then click **Supporting Detail**.

3. From this window, click **Actions**, and then add rows that reflect the structure you want.

For example, click **Add Child** to add a row directly below the selected item. See [Working with the Supporting Detail Structure](#).

4. For each row, enter a description of up to 1,500 characters.

5. Set the mathematical relationships among the rows by selecting an operator for each row: click in each row's **Operator** cell, and then select from these operators: + - * / and ~(ignore).
6. Enter data to set or calculate.
Enter numbers using the same scaling that was set up for the form.
7. Click **Save**.
Values are dynamically calculated and aggregated before the data is saved. Data on the form is also saved.

See [Working with the Supporting Detail Structure](#).

Working with the Supporting Detail Structure

Learn how to structure the elements in Supporting Detail.

To create or change the Supporting Detail structure:

1. Select a row, and then click one of the following options from **Actions**:

Table 11-1 Supporting Detail Options

Option	Result
Add Child	Adds an item one level below the selected cell. You can add unlimited children, but consider the potential performance impact.
Add Sibling	Adds an item at the same level as the selected cell. You can add unlimited siblings, but consider the potential performance impact.
Delete	Removes the selected item.
Delete All	Removes all Supporting Detail.
Promote	Moves the selected item to the next-higher level.
Demote	Moves the selected item to the next-lower level.
Move Up	Moves the selected item before its sibling predecessor.
Move Down	Moves the selected item after its sibling successor
Duplicate Row	Adds a row below the selected item, duplicating its structure (text, operator, and values)
Fill	When you select contiguous cells and then enter a value in one of the cells, fills the other empty cells

2. Click **Save**.
Save stores the rows, data, and calculated values.

Order of Supporting Detail

The Supporting Detail order affects the resulting value that is saved.

Understanding the calculation order helps you correctly enter Supporting Detail. Supporting Detail leverages the calculation order of + (addition), - (subtraction), * (multiplication), and / (division). A simple Unit times Rates example demonstrates how to correctly enter Supporting Detail.

See [Incorrectly Entering Supporting Detail](#) and [Correctly Entering Supporting Detail](#).

Incorrectly Entering Supporting Detail

This example shows the order of rows in Supporting Detail generating incorrect data.

Because Rate in the following table is set to the unary operator +, the calculation order first adds the Rate and then multiplies by the Unit, resulting in incorrect data for Feb and Mar.

	Jan	Feb	Mar
Rate +	250	250	250
Unit *	10		
Total:	2500	250	250

Correctly Entering Supporting Detail

This example shows the order of Supporting Detail generating correct values.

The following table shows the correct order of the Units times Rates calculation, resulting in correct values.

	Jan	Feb	Mar
Unit +	10		
Rate *	250	250	250
Total:	2500		

Verify the Supporting Detail order, ensuring that correct values are calculated and saved.

Totaling When Supporting Detail Cells are Blank

If a data cell in Supporting Detail is blank, FreeForm ignores it when aggregating values (instead of assuming that a blank cell means zero).

For example, you might define Supporting Detail to calculate the daily rate of hiring an instructor (\$250) times the number of days per month for which you plan to hire an instructor (4 in January, but none in February). The Instructor total for Feb is 250, even though you don't intend to hire an instructor in Feb:

	Jan	Feb
Instructor	1000	250
Rate +	250	250
Days	4	

To correctly total values that are aggregated by the * multiplier when some cells are blank, you can leave the Rate cell blank, or enter a zero in the Days cell, instead of leaving it blank:

	Jan	Feb
Instructor	1000	0
Rate +	250	250
Days	4	0

This causes the rate (250) to be multiplied by 0 (zero), resulting in a value of zero for Feb.

Pasting Multiple Cells into the Supporting Detail Window

You can copy Supporting Detail from multiple cells in Microsoft Excel or another product and paste it into the **Supporting Detail** window.



Note:



This functionality is available on desktops only, not on mobile devices.


For example, you can work on Supporting Detail in spreadsheets, and copy it back to FreeForm.

About copying and pasting Supporting Detail:

- The cell range of the data that you paste must exist in the **Supporting Detail** window. Any excess values on the clipboard are ignored when you paste the contents of the clipboard.
- You can copy only the *data* (not the row descriptions or labels) in a range of cells from Microsoft Excel into a range of cells in Supporting Detail.
- The pasted data does not retain the original formatting.

To copy Supporting Detail from a Microsoft Excel worksheet:

1. In FreeForm, select a cell or range of cells that you want to view or create Supporting Detail for, then click , then , and then click **Supporting Detail**.

2. In **Supporting Detail**, note the range of cells with Supporting Detail, or add cells with Supporting Detail, and then click **OK**.
3. In Excel, select the range of cells containing Supporting Detail, and then press **Ctrl+C** to copy the data.
4. In FreeForm, open the form to which to add Supporting Detail.
5. Select the cell or cells with the details to modify, and then click **Supporting Detail**.
6. In **Supporting Detail**, click in the gray frame of the range's upper-left cell that you want to paste Supporting Detail to , and then press **Ctrl+V**.
In your browser, pressing **Ctrl+V** displays the clipboard. Press **Ctrl+V** again to paste the copied data.
7. Click **Save**.

12

Working with Reports

Create reports and books to view summaries of key data.

FreeForm provides two ways to create reports that enable you to summarize your data:

- Reports
- Financial Reporting

Reports

This next-generation cloud-based reporting solution provides a user-friendly, robust report development framework along with an enriched report viewer experience. Reports enables users to insert charts and grids utilizing Oracle Enterprise Performance Management Cloud sources, such as Oracle Essbase as well as ERP Cloud Financials, into a report. This reporting solution works alongside with, and will eventually replace, Financial Reporting.

To work with the Reports functionality, on the Home page click **Reports**, and then click the



Reports tab on the left side of the page.

See [Working with the Reports Reporting Solution](#).

Financial Reporting

This legacy reporting solution generates highly formatted, book-quality financial and management reports that are GAAP compliant.

To work with the Financial Reporting functionality, on the Home page click **Reports**, and then



click the **Financial Reports** tab on the left side of the page.

See [Working with Legacy Financial Reports and Books](#).

Working with the Reports Reporting Solution

Overview of Reports

Reports, which has previously been available as Management Reporting in the Narrative Reporting business process, is now embedded in the Oracle Enterprise Performance Management Cloud Platform business processes and applications alongside, and eventually replacing, Financial Reporting. Reports provides a user-friendly, robust report development framework along with an enriched report viewer experience.

To learn about designing and working with the Reports reporting solution, see the following topics and guides:

- Learning About Reports in *Working with Reports for Oracle Enterprise Performance Management Cloud*

- Learning About Reports in *Designing with Reports for Oracle Enterprise Performance Management Cloud*

Accessing Reports and Viewing the Reports Repository



To view the next-generation Reports, on the Home page, click



the **Reports** tab on the left side of the page.

The **Reports** listing page uses the same folder hierarchy as dashboards, infolets, and data entry forms and all artifacts and folders reside under a root folder called **Library**. Reports, books, and bursting definitions are stored in the Reports repository.

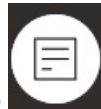
Note:

Only administrators can add files (for example, dashboards, infolets, forms, reports, and so on) to the **Library** root folder.

- To search for Reports or a folder, enter search text in the **Search** box at the top of the pane and click .
- On the listing page for **Reports**, you can toggle between viewing reports folders in a flat view or a tree view:

You can also access 3rd party documents used and generated with Books and Bursting under **Documents**. For example, MS Word and PDF documents inserted in Books, and CSV files used in a bursting definition, along with PDF files generated by a bursting definition.

To view the **Documents** repository, on the Home page, click **Reports**, and then click





the **Documents** tab on the left side of the page.


Managing Folders and Reports

Reports are managed on the **Reports** listing page with different view options available. Under **Documents**, you can access and maintain 3rd party documents used and generated with Books and Bursting; for example, MS Word and PDF documents inserted in Books and .CSV files used in a bursting definition, along with PDF files generated by a bursting definition.

Reports and Documents are grouped into folders. When viewing the Reports listing you can:

- Search by a report artifact or document
- Filter by a folder. For report artifacts, you can filter by the type (**Report, Snapshot, Book, Bursting Definition**)

- Switch between a folder tree view or a flat list view:  

Report designers can perform the following folder and report management tasks by clicking the  icon for folders or for individual reports:

- For folders:
 - **Upload file** (Documents only)
 - **Create Folder**
 - **Delete**
 - **Rename**
 - **Move to**
 - **Assign Permission**
- For reports, books, and bursting definitions:
 - **Open** (reports and books only)
 - **Edit**
 - **Rename**
 - **Copy As**
 - **Delete**
 - **Move To**
 - **Assign Permission**
 - **Copy URL**
- For documents:
 - **Properties**
 - **Copy As**
 - **Delete**
 - **Move to**
 - **Assign Permission**

The **Documents** listing supports the following file types and extensions (the default file size limit is 5mb, except for **.PDF** which supports 100mb):

- Word (**.DOC**, **.DOCX**)
- Excel (**.XLS**, **.XLSX**)
- Comma Separated Values (**.CSV**)
- PDF (**.PDF**)
- Text (**.TXT**)
- PowerPoint (**.PPT**, **.PPTX**)

To upload a 3rd party file in **Documents**:

1. In the **Documents** listing, select a destination folder, then either:
 - Click **Upload** in the top right of the **Documents** panel.

- Click the **•••** icon and select **Upload File**.
2. In **Upload File**, select a file to upload from your local file system, and then click **OK**. The file will be uploaded to the selected folder.

To download a 3rd party file in **Documents**, in the **Documents** listing, browse to the desired file location and click on the file name to download it.

Reports Books and Bursting

Reports includes books and bursting functionality. 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. You can schedule a bursting definition as a scheduled job. To learn how to work with the books and bursting features in Reports, see the following topics in *Designing with Reports for Oracle Enterprise Performance Management Cloud*:

- Working with Books
- Working with Bursting

To schedule a bursting definition as a scheduled job, see Scheduling Jobs in *Administering FreeForm*.

Migrating Financial Reporting Reports to Reports

You can migrate Financial Reporting reports to Reports either with in-place migration where you can migrate all or individual reports, or by importing Financial Reporting report files that were exported locally from the Explore Repository. Please note when migrating, the system will convert as many elements of the original report into the Reports equivalent as possible. However, there are differences between the two solutions, and not all elements exist in both solutions. You may have to modify certain elements after the report has been migrated in order to produce a report that is equivalent to the original report.

Financial Reporting will eventually be removed at some future undetermined date, after you have ample time to migrate your content from Financial Reporting to Reports.

See Migrating Reports from Financial Reporting in *Designing with Reports for Oracle Enterprise Performance Management Cloud*.


Managing Fonts in Reports

Oracle recommends that the report designer upload any TrueType fonts that your company uses to produce reports. You can upload individual font files or zipped files containing multiple TrueType fonts to the **Fonts** folder using **Application Settings**.

The font file must be a TrueType font and cannot already exist in the font folder structure. If you do upload a duplicate font, you will receive an error message indicating the duplicate (or invalid) font file. If you uploaded multiple fonts in a zip file, all other valid files are loaded.

When uploading a font, you must ensure whether that font has any variants such as **Regular**, **Italic**, **Bold**, and **Bold Italic** fonts which are part of the font family itself. In this case, you may want to upload the complete font family as a zip file instead of uploading the regular font file that will be used within the system. For more details about font family and its variants, see [Microsoft Font library](#).

To upload fonts in EPM Cloud deployments:

1. From an EPM Cloud service, click **Application**, and then click **Settings**.
For more information, see What Application and System Settings Can I Specify? in *Administering FreeForm*
2. To specify the reporting options, click **Report Settings**.
3. From the Settings page, click **Manage Fonts**.
4. From the Fonts page, click , and then select **Upload File**.
5. Click **Browse** in the Upload File dialog to navigate to the TrueType fonts that you want to upload, and then click **OK**.

 **Note:**

If you need to upload more than one font, create a zip file. Be aware that it might take some time to perform the upload depending on the size of the font file.

Considerations

The backslash character (\) is restricted in Reports.

Working with Legacy Financial Reports and Books



On the Home page, click **Reports**, and then click the Financial Reports tab on the left side of the page.

An example of a report:



Vision Operations
Account Detail Report

Entity
Forecast

Report Run Date: 18-Jun-19 2:09:56 PM by fin_superuser

	Q3	Jul	Aug	Sep	Q4	Q1	Q2	4 Quarter
	FY14				FY14	FY15	FY15	Total
5800: Salaries	474,826	161,175	168,376	145,275	488,306	542,989	540,961	2,047,082
6100: Miscellaneous Employee Expenses	125,072	42,382	44,281	38,410	128,406	144,408	145,198	543,085
6000: Total Employee Expenses	599,899	203,556	212,657	183,685	616,712	687,397	686,159	2,590,167
7110: Advertising	524,574	165,379	178,341	180,854	498,034	819,649	863,798	2,706,055
7120: Public Relations	330,797	107,448	111,205	112,145	329,719	1,320,641	1,156,839	3,137,996
7410: Utilities	885,131	299,470	293,434	292,227	879,095	1,345,518	1,406,329	4,516,072
7420: Rent Expense	1,095,357	370,988	362,738	361,631	1,087,711	1,664,904	1,743,499	5,591,471
7440: Cleaning and Maintenance	863,690	505,049	179,321	179,321	1,786,715	5,400,722	2,235,284	10,286,412
7450: Telephone Expenses	562,368	189,233	188,429	184,706	555,828	845,574	886,612	2,850,382
7460: Office Supplies	324	108	108	108	324	1,205	758	2,611
7510: Postage	224,632	76,351	74,141	74,141	223,427	331,502	345,966	1,125,527
7530: Equipment Expense	273,938	104,865	123,070	46,003	352,926	1,759,339	1,047,733	3,433,937
7003: Total Office Expenses	4,760,811	1,818,891	1,510,785	1,431,135	5,713,779	13,489,055	9,686,818	33,650,464
7620: Legal Services	72,419	39,086	16,667	16,667	136,127	878,777	376,300	1,463,623
7004: Total Facility Services Expenses	72,419	39,086	16,667	16,667	136,127	878,777	376,300	1,463,623
7640: Airfare	116,572	39,468	38,623	38,481	116,290	153,507	173,779	560,147
7650: Car Rental	31,297	10,432	10,432	10,432	31,396	33,423	34,295	130,410
7660: Shipping	1,648,718	707,293	728,858	212,566	616,844	2,080,164	2,624,543	6,970,268
7670: Accommodation	26,459	8,820	8,820	8,820	26,764	36,040	38,950	128,213
7690: Meals	6,312	2,104	2,104	2,104	6,312	9,259	9,805	31,688
7695: Entertainment	5,817	1,939	1,939	1,939	5,817	13,224	13,761	38,619

You can also create report books, which are collections of related reports. See [Creating Dynamic Books](#).


Related Topics




- [Types of Financial Reports](#)
- [Creating Snapshot Reports and Books](#)
- [Fine-Tuning Reports and Books](#)
- [Exporting Formatted Reports to Excel](#)
- [Creating Dynamic Reports](#)
- [Viewing and Updating Dynamic Reports](#)
- [Creating Dynamic Books](#)
- [Viewing and Updating Dynamic Books](#)
- [Displaying the POV Member Selector for a Report](#)
- [Using Financial Reporting Reports and Annotations](#)

Types of Financial Reports

Snapshot reports and books display a view of data when the financial report or book was saved, so they show data at a point in time. With dynamic financial reports and books, you view the latest data and can change which data to view.

The icons on the **Financial Reports** page describe their type:

- : Dynamic report, one that you can preview on-the-fly as you create or change it.

-  : Snapshot report, which you create in Financial Reporting from a dynamic report. See [Creating Snapshot Reports and Books](#).
-  : Dynamic book, a collection of reports that you create in Financial Reporting.
-  : Snapshot book, which you create in Financial Reporting from a dynamic book. See [Creating Snapshot Reports and Books](#).



Tip:

See [Exporting Formatted Reports to Excel](#).

See also *Working with Financial Reporting for Oracle Enterprise Performance Management Cloud*.

Creating Snapshot Reports and Books

You generate snapshot reports and books in several ways.

You can generate a snapshot report either by saving a report in Financial Reporting as a snapshot report, or by scheduling the report in a batch to output as a snapshot. You can generate a snapshot book either by running a book in Financial Reporting and then saving the book as a snapshot book, or by scheduling the book in a batch to output as a snapshot.



Note:

You can open snapshot books only in PDF format.

Fine-Tuning Reports and Books

With dynamic reports and books, you can preview and change them on-the-fly as you create and view them.



For reports and books that have a POV, you can select different POV members to change the context of the presented data. You can create reports of FreeForm data using ad hoc grids. You can publish related reports as report books in Financial Reporting.

Exporting Formatted Reports to Excel

You can export formatted reports to Microsoft Excel.

1. On the Home page, click **Reports**



2. Select a report to export to Excel.
3. Under **Actions**, click the Excel icon  .
4. If the report is dynamic, you can click  to display different members in the POV.
5. Click **Continue**, open or save the file, and view the formatted report in Excel.



Note:

You can also export reports to Excel while viewing the report. See [Viewing and Updating Dynamic Reports](#).

Creating Dynamic Reports

You can generate reports of data in ad hoc grids.

For information about working with ad hoc grids, see [Using Ad Hoc for Data Entry and Analysis](#).



Note:

If the ad hoc grid displays collapsed members, the report you create from it also displays as collapsed. So if you want the report to display as expanded, expand the ad hoc grid before you create the report.

1. From an ad hoc grid, click **Save Ad Hoc Grid**, and then **Report**.
See [Creating an Ad Hoc Grid](#) and [Accessing an Ad Hoc Grid](#).
2. Specify a name, and optionally click **Replace** to replace a previous report.
3. To view the report, click **Reports**, then **Refresh**, and then the report or book.

Viewing and Updating Dynamic Reports

You can view a dynamic report in HTML or PDF format. You can update the report by selecting different POV members or by expanding members.

1. On the Home page, click **Reports**



, and then click the report you want to see.

You may need to expand a folder containing the report. You can toggle between viewing reports by a flat view or a tree view:



 **Tip:**


Click **Refresh** to see recently-saved reports.

2. Click **HTML**, **PDF**, or **XLS** for the report.

The POV on the top defaults to the last selected members. See [Displaying the POV Member Selector for a Report](#). If there is no pre-defined member, see Step 4 for selecting POV members.

For information on the **XLS** option, see [Exporting Formatted Reports to Excel](#).

Click **Continue**.

3. **Optional:** Select the members you want to display from the Page drop-down list.
4. **Optional:** If you view the report in HTML, you can expand members (for example, expand Q1 to display Jan, Feb, and Mar). Using the **HTML Preview** or **PDF Preview** toggle on the top left of the page, you can then switch to PDF with the expanded report displayed.
5. **Optional:** If you view the report in HTML, you can select different POV members.
 - To search for a member, enter all or part of the name in the text box.
 - To change the member data displayed, click  .
See [Working with Members in Administering FreeForm](#).
 - **Optional:** In **HTML Preview**, click **Export in Query-Ready Mode** to export the report to Excel, reflecting the preferences that you set. See [Setting Your Report Preferences](#).

 **Note:**

Clicking **XLS** on the **Reports** page produces a fully-formatted Excel copy of the report, which is not dynamically linked to the source data.

- **Optional:** You can export the report as fully-formatted to Excel. For example, if you've expanded rows and columns, use the **Export to Excel** toggle on the top left of the page.

Creating Dynamic Books

Create books of related FreeForm reports in Financial Reporting.


 **Note:**

You can open dynamic books in PDF format only.

Viewing and Updating Dynamic Books

You can preview and select different members in a dynamic book that was created in Financial Reporting. If you select different book POV members, the new members replace the POV of reports in the book that used the original POV selection.



For example, if three reports use 2019 as the Year member, and you change the book POV to 2020, the reports display data for 2020.

1. Click **Reports**, and then .
2. To the right of the report you want to work with, under **Actions**, click **HTML** or **PDF**.

To expand dimensions to the level of detail you want, click **HTML Preview**, and make your changes.

Note:

To export a formatted report to Microsoft Excel, see [Exporting Formatted Reports to Excel](#).

3. To select different POV members, click .
 - To search for a member, enter all or part of the name in the text box.
 - To change the member data displayed, click .
See [Displaying the POV Member Selector for a Report](#).
4. Click **Continue**.

The book is generated and displays in a separate window. For example, a PDF book displays in Adobe Acrobat

Displaying the POV Member Selector for a Report

Selecting the **Show POV Options** option on the **Reports** page enables you to select different members in reports that have a POV.

When you click **Reports**



on the Home page, the **Reports** page displays, where you select the report to display. If you select the **Show POV Options** check box on the page and select a report that has a POV, a POV member selector window is displayed.

See *Working with Members in Administering FreeForm*.

Your selection for this check box applies to all reports in the list that have a POV and persists for the current session, until you log out.

If you clear the **Show POV Options** check box (it's selected by default), the report launches directly, without displaying the POV member selector window. The POV members in the report are the most recently used members on the form, or the dimension's root if there are no most recently used members.

Even if you launch a report directly and bypass the POV member selector window, when the report is displayed, you can still change the members in the POV by clicking a link in the POV and selecting different members.

Using Financial Reporting Reports and Annotations

To view report annotations, enable the corresponding option in Financial Reporting.

Financial Reporting options:

- Perform an advanced search to find reports
- Attach repository artifacts to annotations
- Open annotation attachments
- Specify annotation access permissions

You can access Financial Reporting by clicking the Navigator's **Manage Reporting** link.

13

Using Business Rules

Like formulas in Microsoft Excel, business rules launch specific calculations.

For example, you might launch a business rule to calculate the updated employee expenses for your department. Your administrator sets rules up for you. Your administrator may schedule business rules to run at a set time or at a regular interval. Administrators can also set business rules to automatically launch when you open a form or when you save the data in a form.

Launching Business Rules

You can also run a business rule from within a form or from a task list if your administrator set them up that way.

1. On the Home page, click **Rules**



.

Optional: Filter the business rules by cube or type of business rule.

2. To the right of the business rule to run, click **Launch**.
3. If presented with a runtime prompt, enter or select the required information, and then click **Launch**.

See [About Runtime Prompts](#).

If the rule runs successfully, a message displays and data is updated. The **Jobs** page lists business rules that have recently run or have errors. See [Checking Job Status](#).

About Runtime Prompts

Some business rules prompt you to enter or select information, called a *runtime prompt*.

About runtime prompts:

- The type of information you're prompted for can vary. Examples:
 - One or more members or a range of members. For a range of members, you select from each dimension the designer set (for example: IDescendants("Marketing"),FY19).
 - A number
 - Text
 - An item in a list
 - A dimension or cross-dimension, which is a member combination that includes only one member from each dimension the designer has set (for example: Sales -> Actual -> Jan, which refers to the member intersection of Sales, Actual, and January).

- Your administrator can set up forms to launch business rules when you open or save the form.
- If your administrator enabled the parent member for adding dynamic children, you can create new members by entering their name in the runtime prompt.
See About Dynamic Members in *Administering FreeForm*.
- If a business rule has a runtime prompt and the administrator selected **Use Members on Forms**, the default member on the runtime prompt window matches the current member in the page or POV axes of the open form.
- If multiple business rules having runtime prompts are launched when you save the data, enter values for each one, and then click **Launch**.

Checking Job Status

You can monitor many activities on the **Jobs** page. For example, you can check on the execution status of such jobs as Smart Push, and Refresh.

Notes:

- You can be notified by email when a launched job is in a state such as completed, in error, or if it involves violation errors or warnings. To set up email notifications, see [Setting Up Email for Notifications](#).
- You can't cancel or start a job from the **Jobs** page.
- Administrators can view all jobs and their status. All other users can view only their own jobs and their status.
- You can't delete jobs that are processing.

To check the execution status of jobs:

1. Click **Application**, and then **Jobs**.
2. To filter which jobs display, select any of the following: **Job Type**, **Status**, **Job Name**, **Start Time**, and **End Time**, and then click **Apply**.
3. **Optional: For administrators only:** To remove selected jobs from the list and to remove their job records from the database, click **Delete**.

Setting Your Preferences

Related Topics

- [Setting Your Preferences](#)
You can set preferences to control many aspects of function and display, including how reports and forms are printed.
- [Setting General Preferences](#)
On the General tab, you can set your preferred time zone, language, profile picture, out-of-office assistant, and so on.
- [Setting Your Display Preferences](#)
You can set how you want numbers formatted, how many members to display on the Page drop-down list, how the members are indented, how dates are formatted, and whether consolidation operators display.
- [Setting Up Email for Notifications](#)
You can set which activities you want to be notified of by email when there's a change in task lists, and the jobs.
- [Setting Ad Hoc Options](#)
Control the display and behavior of ad hoc grids by setting your preferences.
- [Setting User Variables](#)
User variables act as filters in forms, enabling you to focus only on certain members, such as your department. Before you can open a form, you must set your preferences for the user variables that your administrator has set up.
- [Setting Your Report Preferences](#)
You can set preferences for how you want to print and export next-generation Reports and Financial Reporting reports.
- [Setting Your Printing Preferences](#)
You can set your preferences for how forms and their data are printed as PDF files.

Setting Your Preferences

You can set preferences to control many aspects of function and display, including how reports and forms are printed.



Note:

The preferences that you set take precedence over the preferences that your administrator set, but you can restore the administrator's setting by clicking **Use Administrator's Settings**.

To set your preferences:

1. On the Home page, click **Tools**



, and then **User Preferences**



2. Click the tabs on the left to set your preferences.
 - **General:** Set your profile photo, your preferences for time zone, language, which alias table to use, and the display of member names and aliases. See [Setting General Preferences](#).
 - **Display:** Set your preferences for how numbers are formatted, how members are displayed on Page drop-down lists, whether consolidation operators are displayed, and the date format. See [Setting Your Display Preferences](#).
 - **Notifications:** Set your email address and select which activities you want to be notified about: **Task Lists**, and the **Jobs**. See [Setting Up Email for Notifications](#).
 - **Ad Hoc Options:** Set options for working with ad hoc grids. See [Setting Ad Hoc Options](#).
 - **User Variables:** Select members for user variables that your administrator set up. See [Setting User Variables](#).
 - **Reports:** Set preferences for displaying reports. See [Setting Your Report Preferences](#).
 - **Form Printing:** Set your preferences for how to print data in forms as PDF files. See [Setting Your Printing Preferences](#).

Setting General Preferences

On the General tab, you can set your preferred time zone, language, profile picture, out-of-office assistant, and so on.

1. On the Home page, click **Tools**



, and then **User Preferences**



2. Click **General**.
3. Set your preferences for:
 - Your time zone. You can type ahead, for example, type "PT" for Pacific Time. The default time zone for new users is **(UTC) Reykjavik - Greenwich Mean Time**.

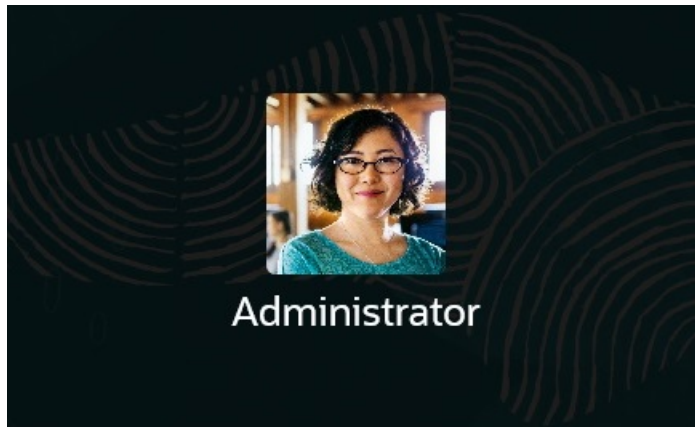
- The language used to display labels and buttons. If you don't select a language, then your browser's locale is used.
- Your profile photo. See [Setting Your Profile Picture](#).
- Which alias table to use and how you want members or their aliases displayed. (Your administrator can set up alias tables and assign alternate names, or aliases, to Account, Currency, Entity, Scenario, Period, Version, Years, and user-defined dimension members. The administrator can set up to 30 aliases per dimension member, including the default alias.)
See [Setting the Display of Member Names or Aliases](#).

4. Click **Save**.

Setting Your Profile Picture

Upload a profile picture to display on the Home page and elsewhere within the application.

For example:



To upload a profile picture:

1. On the Home page, click **Tools**



, and then **User Preferences**



2. By **Profile Image**, click **Browse** to find and open the image file.
The image file can be of type `.png`, `.jpg`, `.jpeg`, or `.gif`.
3. Click **Save**.
The profile picture displays after you sign out and then sign back in. If the uploaded picture exceeds 100 x 100 pixels, it will automatically be resized.

 **Note:**

Automatic resizing only impacts new profile images that are uploaded in **User Preferences**. Existing profile pictures will not be resized.

Setting the Display of Member Names or Aliases

On the **General** page, you can set which alias table you want to use and how you want the member name or alias displayed.

An *alias* is another, often more descriptive, name for a member. Sets of aliases are stored in *alias tables* that your administrator creates. For example, there may have an alias table for English member names, another alias table for German member names, and so on.

1. On the Home page, click **Tools**



, and then **User Preferences**



2. Click the **General** tab, and then select an alias table from **Alias Table**.
3. From **Display Member Label as**, select how you want member names to display:
 - **Member Name**
 - **Alias**
 - **Member Name:Alias**
 - **Alias:Member Name**
 - **Default**. If you select **Default**, then the form, grid, or dimension settings determine how member names are displayed.
4. Click **Save**.

Setting Your Display Preferences

You can set how you want numbers formatted, how many members to display on the Page drop-down list, how the members are indented, how dates are formatted, and whether consolidation operators display.

1. On the Home page, click **Tools**



, and then **User Preferences**



2. Click **Display**, and then set your preferences:
 - Under **Number Formatting**, set how numbers are formatted. Your selections apply to all currencies, in all forms that you have access to. You can't select the same option for the **Thousands Separator** and the **Decimal Separator**.
 - Under **Page Options, Indentation of Members**, set how members are indented on the page and how many items you want listed on the Page drop-down list. If you select **Do not indent**, the members are displayed as a flat, sequential list. If the Page drop-down list displays so many items that you have to scroll through the list, you may want to let a lower number of items to display in the **Number of Items on the Page Drop-down**.
 - Under **Other Options**, set whether to show consolidation operators (for example, **Yes, No**, or use the **Form Setting**). Also set the **Date Format** (for example, **dd/MM/yyyy**). Selecting **Automatically Detect** sets the date format based on your browser locale. The format you select is used throughout the user interface, including in reports.

Also, select an option for **Enable User Formulas in Ad Hoc**. Selecting **Yes** allows you to perform calc on the fly without having to submit changes to the database.
3. Click **Save**.

Setting Up Email for Notifications

You can set which activities you want to be notified of by email when there's a change in task lists, and the jobs.

A new user inherits the default email notification settings defined by the Service Administrator. This includes settings for late notifications, status change notifications, and due date reminder notifications. If the Service Administrator has allowed users to define their own email notification settings, any user can do one of the following:

- Continue to use the default settings defined by the Service Administrator by selecting **Use Administrator's Settings**. Any updates that the Service Administrator subsequently makes to email notifications settings will be reflected in the user's settings.
- Customize their email notification settings by using **Notify Me** for one or more settings. If the user does not set a value for one or more settings, those settings will continue to use the default values set by the Service Administrator.



Note:

If the Service Administrator has disallowed users to customize their notification settings, then **Use Administrator's Settings** is disabled.

To set up and enable email notifications:

1. On the Home page, click **Tools**, and then **User Preferences**.
2. Click **Notifications**.

Notification Type	Notify Me
Late Notification	Every 3 hours
Status Change Notification	Mixed
Due Date Reminder Notification	Once a day

3. **Optional:** If you are a Service Administrator, select **Use Administrator's Settings** to prevent any user customizations to the email notification settings. If the Service Administrator selects this checkbox then all the user preference settings will get overwritten by the administrator's settings, that is, the user will inherit the preferences set by the administrator.
4. For **Email Address**, enter your email address.
5. Under **Notifications**, select the application updates for which you want notifications:
 - **Task Lists**
 - **Job Console**
6. Select an **Email Start Time** and **Email End Time**.
7. For a **Notification Type**, select an option for **Notify Me**:
 - **Immediately**

 **Note:**

If you set **Notify Me** to **Immediately**, the email notifications are sent immediately even when it is outside of the user's email start/end time.

- **Once a day**
 - **Every 2 hours**
 - **Every 3 hours**
 - **Every 4 hours**
 - **Every 6 hours**
 - **Mixed**
 - **Never:** Select this option to deactivate a notification. Note that this option is only applicable for **Status Change Notification** and **Due Date Reminder Notification**. For **Late Notification**, only the following notification types get this option:
 - **You are the task owner and task assignee is late**
 - **You are the task owner and task approver is late**
8. Click **Save**.

Setting Ad Hoc Options

Control the display and behavior of ad hoc grids by setting your preferences.

1. On the Home page, click **Tools**



, and then **User Preferences**



2. Click **Ad Hoc Options**.
3. In the top section, set how members are displayed:
 - **Member inclusion:**
 - **Include selection:** Select to display both the selected member and the members retrieved as a result of the operation. For example, zooming in on the selected member Qtr1 displays data for Qtr1, Jan, Feb, Mar.
 - **Within selected group:** Select to perform an operation such as Zoom only on the selected group of members, leaving unselected cells as is. This setting is meaningful only when there are two or more dimensions down the grid as rows or across the grid as columns. This option pertains to **Zoom**, **Keep Only**, and **Remove Only**.
 - **Zoom in:** Select the level at which to zoom in:
 - **Next level:** Select to get data for the children of the selected members.
 - **All levels:** Select to get data for all descendants of the selected members.
 - **Bottom level :** Select to get data for the lowest level of members in a dimension.
 - **Ancestor Position:** Set how to display ancestors in the hierarchy:
 - **Top:** Select to display member hierarchies in order from highest to lowest level.
 - **Bottom:** Select to display member hierarchies in order from lowest to highest level.
 - **Display Member Label as:** Set whether member names, aliases, or both are displayed.
 - **Alias Table:** Select which alias table to use.
 - **Indentation:** Set how member hierarchy levels are indented:
 - **None:** Select for no indentation.
 - **Subitem:** Select to indent descendants. Ancestors are left-justified in the column.
 - **Totals:** Select to indent ancestors. Descendants are left-justified in the column.
 - **Navigate without refreshing data:** Selecting this option improves performance as you navigate around the grid, for example pivoting and zooming. Just click Refresh when you want to update the data. (If you don't select this option, data is refreshed as you work in ad hoc.)

4. Under **Suppression**, to simplify your view of the data, select options to suppress elements of the grid. For example, you can hide rows or columns with zeros.
 - **Zeros:**
 - **Row:** Select to hide rows containing only zeros.
 - **Column:** Select to hide columns containing only zeros.
 - **Suppress:**
 - **Repeat members:** Select to hide rows that contain repeated member names, regardless of the grid orientation.
 - **Missing blocks on rows:** Select to hide blocks of cells in rows that have no data.
 - **Missing data:** Select to hide rows or columns with zeros or that have no data.
 - **No Access:** Select to hide rows or columns that you don't have access to.

 **Note:**

If you get this error when you try to open an ad hoc grid, "Ad hoc grid cannot be opened as there are no valid rows of data", clear the above **Suppression** options.

5. Under **Precision**, set:
 - **Use currency member setting:** Select to apply the precision setting of the Currency member.
 - Set the minimum and maximum number of decimal positions to display in a cell for currency values, non-currency values, and percentage values. For example, if the cell value is 100, and you select the **Minimum** precision "2", the value displays as "100.00".
6. Under **Replacement**, set labels to display for cells that are missing data, that you don't have access permission to view, or that have invalid data:
 - **No Data:** Enter the text that you want displayed for cells that have #Missing or #NoData as their value.
 - **No Access:** Enter the text that you want displayed for cells that you don't have access permission to view.
 - **Submit Zeros:** Select if you specified #NumericZero as the text for the **No Data** or **No Access** replacement option and you want to submit zeros.

Setting User Variables

User variables act as filters in forms, enabling you to focus only on certain members, such as your department. Before you can open a form, you must set your preferences for the user variables that your administrator has set up.

Administrators can set up user variables to help users focus on those members that they're interested in, such as their department's expenses. For example, your administrator can create a form with entities on the rows and a user variable called Department. You can limit the number of rows displayed on the form by selecting a

member for the Department user variable, such as Sales. Later, you can select another member for Department, such as Marketing.

To update user variables:


1. On the Home page, click **Tools**



, and then **User Preferences**



The **User Variables** page lists the user variables that the administrator has set up for each dimension and under **Member**, the currently selected member for each variable.

2. Click  next to the variable you want to change.
You can also type a member name directly in the **Member** column for the dimension.
3. Select members by clicking the member or the checkmark in front of it.
4. Click **Save**.

To learn more, see *Selecting User Variables as Members in Administering FreeForm*.

Setting Your Report Preferences

You can set preferences for how you want to print and export next-generation Reports and Financial Reporting reports.

1. On the Home page, click **Tools**




, and then **User Preferences**



2. Click **Reports**.
3. At the top of the page, there are two tabs from which to choose.
 - **Reports** for next-generation Reports
 - **Financial Reports** for Financial Reporting
4. For **Reports**, set these preferences:

Table 14-1 Reports Preferences

Option	Description
Preview POV	When enabled, opening or previewing a report requires you to click  to refresh data.
Unit of Measurement	Select Inch or Centimeter as the unit of measure.

5. For **Financial Reports**, set these preferences:

Table 14-2 Financial Reporting Preferences


Option	Description
Default Preview Mode	Select whether to preview reports in PDF or HTML format.
User POV Preview	Select On to preview selected POV members.
Annotation Printing Preferences	<p>Define how to print annotations in a report, and then click OK:</p> <ul style="list-style-type: none"> Select Details, and then under Use Footnote Details, select options to create a system-defined footnote. Generic formatting is applied and system-defined sizes and fonts are used. For example, you can select Title, Description, Category, Date, Author, Attachments, and Include Replies. <div style="border: 1px solid #0070C0; padding: 10px; margin: 10px 0;"> <p> Note:</p> <p>If you select Include Replies, select whether to include: All replies; the Top specified number of replies, starting from the initial reply; or the Bottom specified number of replies, which prints the initial annotation and the last number of specified replies. Enter the number of replies to print in the provided space.</p> </div> <ul style="list-style-type: none"> Select Text Object to select a saved text box in the repository that contains the Financial Reporting text function <i>Footnote</i>. In the text box for Use Footnote Text Object, enter text to use in the footnote function in the report's text object to print annotations. The report designer creates footnote functions. This option provides more flexibility for formatting and printing annotations. For example, the footnote function may specify to print only grid annotations with different size, font, and color to be applied to the heading and content. Select None to print no annotations.

Table 14-2 (Cont.) Financial Reporting Preferences

Option	Description
Merge Equivalent Prompts	Select to respond only once or to respond consecutively to prompts and variables that are repeated.
Show Annotations	Select to include annotations in the report.
Query-Ready Export	Select how reports are exported to Excel: <ul style="list-style-type: none"> • Export Mode: <ul style="list-style-type: none"> – Smart View: Exports the report to Oracle Smart View for Office (the default). This option launches a link that opens Smart View. To use this option, you must install Smart View. See Working with Business Process Data in Excel. – Excel Grid: Opens the exported report in Microsoft Excel, but without the Smart View connection. Under Export To, select: <ul style="list-style-type: none"> * New Worksheet: To open the exported report as a new sheet in an existing Excel workbook. * New Workbook: To open the exported report as sheet1 in a new Excel workbook. – Disabled: Hides the query-ready link when the report is displayed using HTML Preview. • Under Export As, select either: <ul style="list-style-type: none"> – Image: To generate a .jpg-based .doc file, where the report content is an image for each page in the Word document. The image format will have the same layout as it does in the PDF, but you can't edit the image. – Document (.docx): To generate a .docx file, where the report content is output to the document as text and tables. Charts are rendered as images, which you can edit in Word. However, report components are lost in the layout information; all the components go to left side in a .docx document. If you have two Financial Reporting objects side-by-side, the right-most object is displayed under the left-most object. Some Financial Reporting functions, such as page (), do not work correctly. • Under Export To, select either: <ul style="list-style-type: none"> – New Worksheet: To open the exported report as a new sheet in an existing Excel workbook. – New Workbook: To open the exported report as sheet1 in a new Excel workbook.

6. Click **Save**.

Setting Your Printing Preferences

You can set your preferences for how forms and their data are printed as PDF files.

When designing a form, your administrator sets the form's printing options, for example, whether to include Supporting Detail. You can accept these default settings or set your own

preferences for printing PDF files. To print to a PDF file, you must have Adobe Acrobat Reader installed.

 **Note:**

The Print option is only available with Forms 1.0. If you're using Forms 2.0, you can use the browser's print feature or the Excel Print feature in Oracle Smart View for Office if you require printing.

1. On the Home page, click **Tools**



, and then **User Preferences**



2. Click **Form Printing**.
3. Under **Page Settings**, set your preferences for paper size, layout, fit, and flow. You can also select whether to print in black and white.
4. Under **Options**, set whether to apply:
 - Formatting
 - Precision
 - Supporting Detail. If you include Supporting Detail, specify how to print it:
 - **Normal Order:** Print Supporting Detail in the same order as on the **Supporting Detail** page, with the parent on top.
 - **Reverse Order:** Print Supporting Detail in reverse order, with the parent on the bottom.
 - Comments (text notes associated with cells)
 - Attribute members, if they're selected in the form
 - The form name
 - Repeated row and column headers across pages
 - The POV/Page
 - Grid lines
 - A footer
5. Click **Save**.