

HOW-TO CREATE A CUSTOM BIP REPORT IN FUSION APPLICATIONS

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BUSINESS REQUIREMENT

Oracle has already delivered a lot of BIP Reports in the Fusion Instance, However during a course of implementation it is a common requirement to develop new ones.

CONTENT

There are few common steps involved they are:

- a) Create a SQL Query which comprises of DB Tables (that exist in Fusion Schema).

We have a SQL Query which is as below:

```
select A.person_number,
       A.full_name,
       A.legal_employer,
       A.business_unit,
       A.department,
       A.absence_plan_name,
       A.adjustment_type,
       A.adjustment_reason,
       A.value,
       A.procd_date accrual_entry_date
from
(
select apaed.per_accrual_entry_dtl_id,
       apaed.per_accrual_entry_id,
       apaed.enterprise_id,
       apaed.value,
       apaed.type,
       apaed.created_by,
       apaed.creation_date,
       apaed.last_updated_by,
       apaed.last_update_date,
       apaed.last_update_login,
       apaed.person_id,
       apaed.pl_id,
       apaed.procd_date,
       apaed.per_event_id,
```

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```
apaed.legal_employer_id,
apaed.assignment_id,
apaed.per_absence_entry_id,
apaed.per_plan_enrt_id,
apaed.work_term_asg_id,
DECODE(apaed.type,'ADJOTH',ADD_MONTHS(procd_date,6),NULL) proposed_expiration_date,
papf.person_number,
ppnf.full_name,
paam.organization_id,
dept.name department,
paam.legal_entity_id,
legal_employer.classification_code      legal_emp_classification_code,
legal_employer.name                    legal_employer,
paam.business_unit_id,
business_unit.classification_code      bu_classification_code,
business_unit.name                    business_unit,
absence_plan.name                     absence_plan_name,
flvt.meaning                          adjustment_type,
                                adj_reason.meaning      adjustment_reason
FROM anc_per_acrl_entry_dtls apaed
JOIN fnd_lookup_values_tl flvt
  ON (flvt.lookup_type = 'ANC_ACCRUAL_ENTRY_TYPE'
  AND flvt.lookup_code = apaed.type
  AND flvt.language = 'US')
JOIN per_all_people_f papf
  ON (apaed.person_id = papf.person_id
  AND TRUNC(sysdate) BETWEEN papf.effective_start_date and papf.effective_end_date)
JOIN per_person_names_f ppnf
  ON (ppnf.name_type = 'GLOBAL'
  AND ppnf.person_id = apaed.person_id
  AND TRUNC(SYSDATE) BETWEEN ppnf.effective_start_date and ppnf.effective_end_date)
JOIN per_all_assignments_m paam
  ON (paam.assignment_id = apaed.assignment_id
  AND paam.person_id = apaed.person_id
  AND paam.primary_assignment_flag = 'Y'
  AND paam.assignment_type = 'E'
  AND TRUNC(SYSDATE) between paam.effective_start_date and paam.effective_end date)
                                LEFT OUTER JOIN
                                ( SELECT      flvt1.lookup_code,
                                flvt1.meaning
                                FROM fnd_lookup_values_tl flvt1
                                WHERE flvt1.lookup_type =
                                'ANC_ABS_PLAN_OTHER_REASONS'
                                AND flvt1.language = 'US'
                                ) adj_reason
```

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```
ON (apaed.adjustment_reason =  
adj_reason.lookup_code)  
LEFT OUTER JOIN  
( SELECT hauf.organization_id,  
  hauf.NAME  
  FROM HR_ORG_UNIT_CLASSIFICATIONS_F houcf,  
  HR_ALL_ORGANIZATION_UNITS_F haouf,  
  HR_ORGANIZATION_UNITS_F_TL hauf  
  WHERE haouf.ORGANIZATION_ID = houcf.ORGANIZATION_ID  
  AND haouf.ORGANIZATION_ID = hauf.ORGANIZATION_ID  
  AND haouf.EFFECTIVE_START_DATE BETWEEN houcf.EFFECTIVE_START_DATE AND  
houcf.EFFECTIVE_END_DATE  
  AND hauf.LANGUAGE = 'US'  
  AND hauf.EFFECTIVE_START_DATE = haouf.EFFECTIVE_START_DATE  
  AND hauf.EFFECTIVE_END_DATE = haouf.EFFECTIVE_END_DATE  
  AND houcf.CLASSIFICATION_CODE = 'DEPARTMENT'  
  AND TRUNC(SYSDATE) BETWEEN hauf.effective_start_date AND hauf.effective_end_date  
) dept  
ON (paam.organization_id = dept.organization_id)  
LEFT OUTER JOIN  
(SELECT hauf.organization_id,  
  hauf.NAME,  
  houcf.classification_code  
  FROM HR_ORG_UNIT_CLASSIFICATIONS_F houcf,  
  HR_ALL_ORGANIZATION_UNITS_F haouf,  
  HR_ORGANIZATION_UNITS_F_TL hauf  
  WHERE haouf.ORGANIZATION_ID = houcf.ORGANIZATION_ID  
  AND haouf.ORGANIZATION_ID = hauf.ORGANIZATION_ID  
  AND haouf.EFFECTIVE_START_DATE BETWEEN houcf.EFFECTIVE_START_DATE AND  
houcf.EFFECTIVE_END_DATE  
  AND hauf.LANGUAGE = 'US'  
  AND hauf.EFFECTIVE_START_DATE = haouf.EFFECTIVE_START_DATE  
  AND hauf.EFFECTIVE_END_DATE = haouf.EFFECTIVE_END_DATE  
  AND houcf.CLASSIFICATION_CODE = 'HCM_LEMP'  
  AND TRUNC(SYSDATE) BETWEEN hauf.effective_start_date AND hauf.effective_end_date  
) legal_employer  
ON (paam.legal_entity_id = legal_employer.organization_id)  
LEFT OUTER JOIN  
(SELECT hauf.organization_id business_unit_id,  
  hauf.NAME,  
  houcf.classification_code  
  FROM HR_ORG_UNIT_CLASSIFICATIONS_F houcf,  
  HR_ALL_ORGANIZATION_UNITS_F haouf,  
  HR_ORGANIZATION_UNITS_F_TL hauf  
  WHERE haouf.ORGANIZATION_ID = houcf.ORGANIZATION_ID  
  AND haouf.ORGANIZATION_ID = hauf.ORGANIZATION_ID
```

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```
AND haouf.EFFECTIVE_START_DATE BETWEEN houcf.EFFECTIVE_START_DATE AND
houcf.EFFECTIVE_END_DATE
AND hauft.LANGUAGE = 'US'
AND hauft.EFFECTIVE_START_DATE = haouf.EFFECTIVE_START_DATE
AND hauft.EFFECTIVE_END_DATE = haouf.EFFECTIVE_END_DATE
AND houcf.CLASSIFICATION_CODE = 'FUN_BUSINESS_UNIT'
AND TRUNC(SYSDATE) BETWEEN hauft.effective_start_date AND hauft.effective_end_date
) business_unit
ON (paam.business_unit_id = business_unit.business_unit_id)
LEFT OUTER JOIN
(SELECT aapf.absence_plan_id,
aapft.NAME
FROM anc_absence_plans_f_tl aapft,
anc_absence_plans_f aapf
WHERE aapft.absence_plan_id = aapf.absence_plan_id
AND aapf.plan_status = 'A' -- added to pick only Active Absence Plans
AND trunc(SYSDATE) BETWEEN aapf.effective_start_date AND aapf.effective_end_date
AND trunc(SYSDATE) BETWEEN aapft.effective_start_date AND aapft.effective_end_date
AND aapft.language = 'US'
) absence_plan
ON apaed.pl_id = absence_plan.absence_plan_id
where pl_id = absence_plan.absence_plan_id
and apaed.value <> 0
order by apaed.person_id,apaed.procd_date asc
) A
where person_number = nvl(:pPersonNumber,person_number)
and legal_employer = nvl(:pLegalEmployer,legal_employer)
and business_unit = nvl(:pBusinessUnit,business_unit)
and procd_date >= nvl(:pCalculationDate,procd_date)
and department = nvl(:pDepartment,department)
and full_name = nvl(:pPersonName,full_name)
and absence_plan_name = nvl(:pAbsencePlanName,absence_plan_name)
```

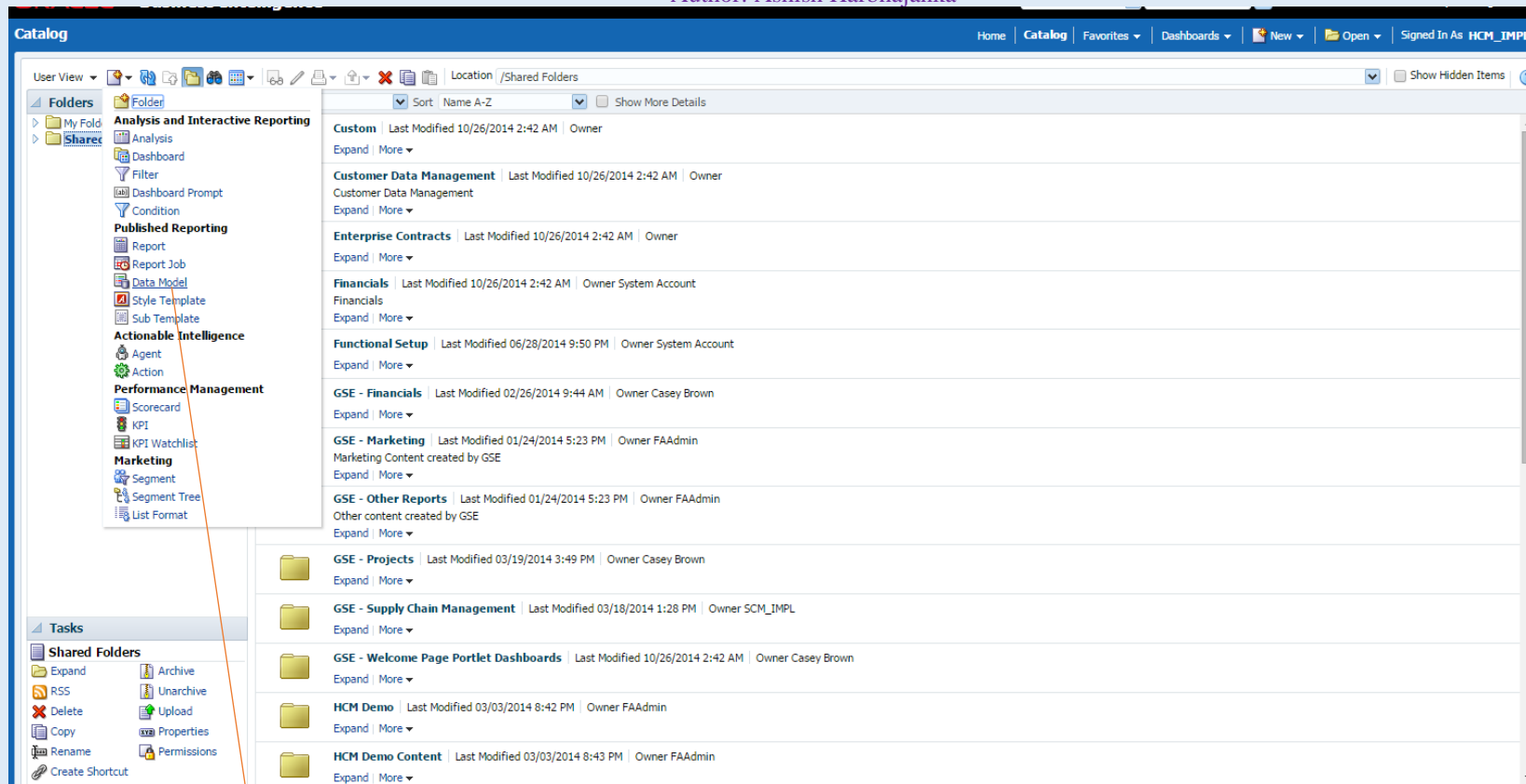


AbsenceAccrualEntryDetails.sql

Navigate to the screen as shown:

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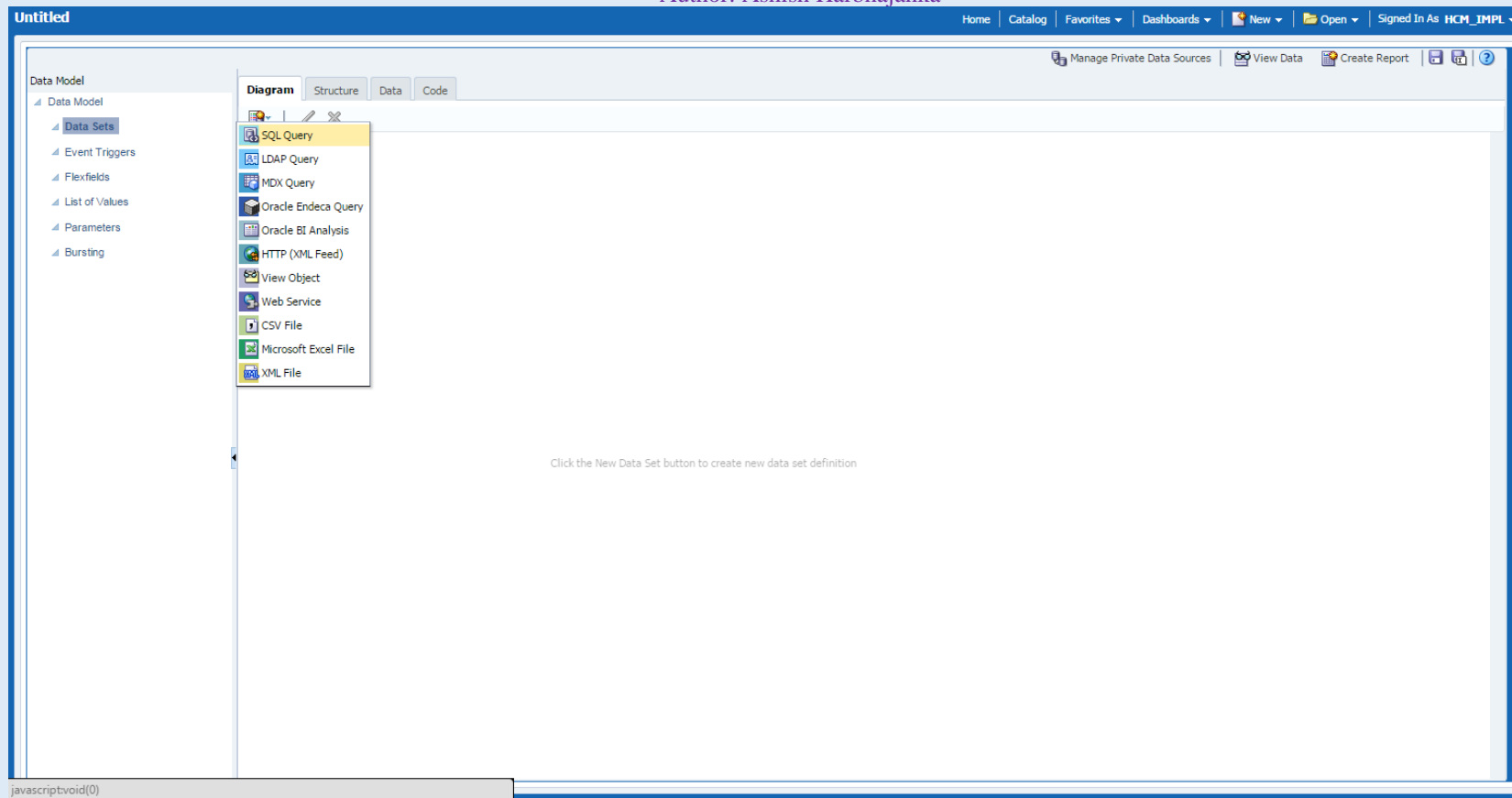


Under Published Reporting -> Data Model

Create a New Data Set (of SQL Query type) as shown in Screenshot below:

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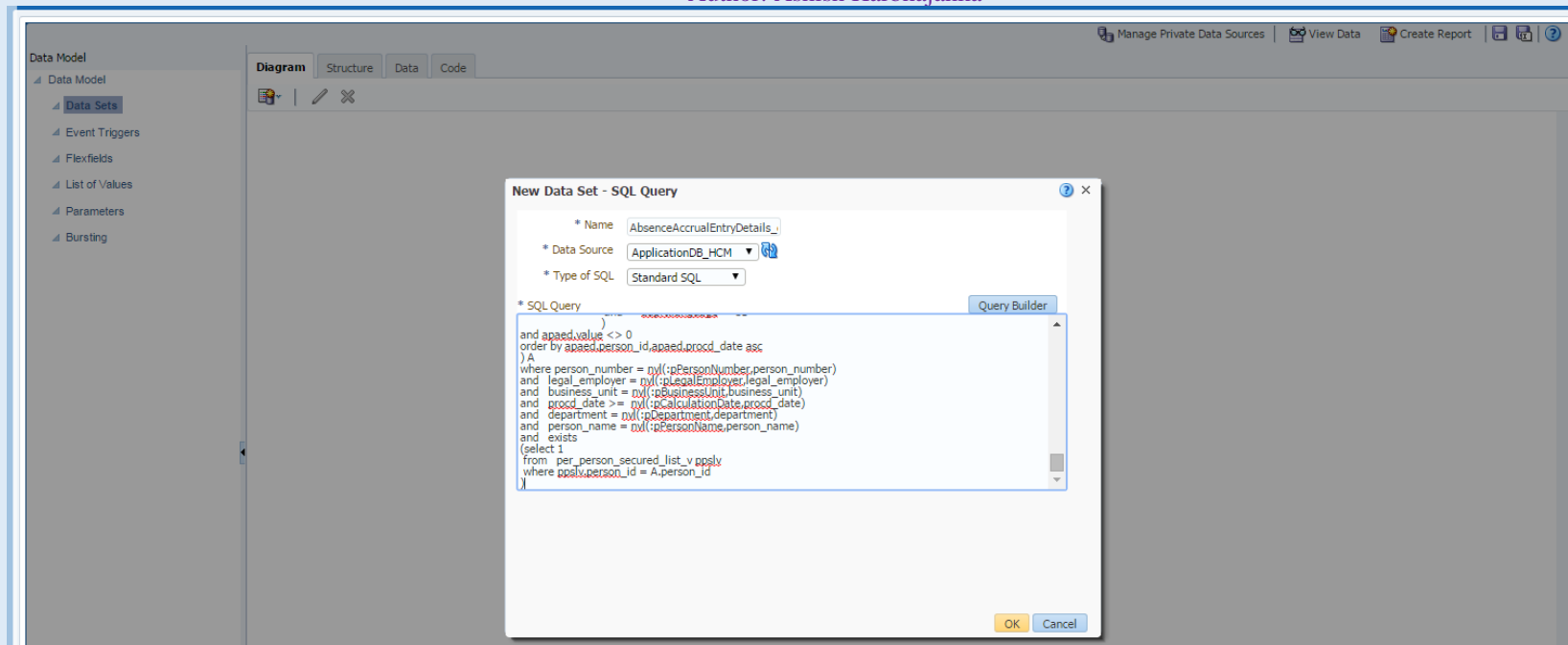
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Give a Name to Data Set (for this example say PersonAbsenceAccrualEntryDetails_ds):

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You would need to take special care while selecting Data Source (Logic Below):

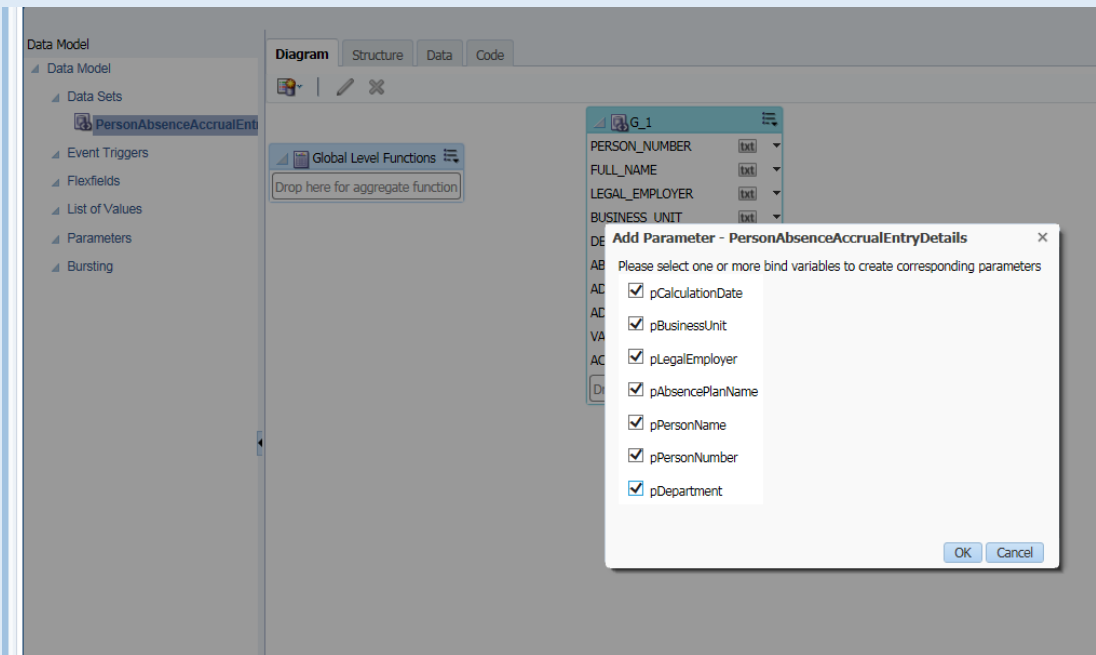
- If you are Building Finance reports use : ApplicationDB_FSCM
- If you are Building HCM reports use : ApplicationDB_HCM
- If you are Building CRM Reports use : ApplicationDB_CRM

For this example we use ApplicationDB_HCM

Depending on the number of Parameters(Bind Variables) used a Popup window will appear as :

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Click OK. Give a Name to the Parameters as shown below

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Parameters

Name	Data Type	Default Value	Parameter Type	Row Placement	Reorder
pAbsencePlanName	String		Menu	1	
pLegalEmployer	String		Menu	2	
pBusinessUnit	String		Menu	3	
pDepartment	String		Menu	4	
pCalculationDate	Date	{SYSDATE(\$)}	Date	5	
pPersonName	String		Menu	6	
pPersonNumber	String		Text	7	

pPersonName: Type: Menu

Display Label: Person Name**

List of Values: Person Name

Number of Values to Display in List: 100

Options:

- ☐ Multiple Selection
- ☒ Can select all
- ☒ NULL Value Passed ☐ All Values Passed
- ☐ Refresh other parameters on change

PARAMETER DETAILS :

PARAMETER NAME	DATA TYPE	DEFAULT VALUE	PARAMETER TYPE	ROW PLACEMENT	DISPLAY LABEL
pLegalEmployer	String		Menu (List of Values Legal Employer)		LegalEmployer**
pBusinessUnit	String		Menu (List of Values Business Unit)		BusinessUnit**

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pDepartment	String		Menu (List of Values Department)		Department**
pAbsencePlanName	String		Menu (List of Values Absence Plan Name)		AbsencePlanName**
pCalculationDate	Date		Text		CalculationDate**
pPersonName	String		Menu (List of Values Person Name)		PersonName**
pPersonNumber	String		Text		PersonNumber**

Data Model is created. Now we need to check the data retrieved.

. Create List of Values for Parameters.

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AbsenceAccrualEntryDetails_dm

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As HCM_IMPL

Manage Private Data Sources | View Data | Create Report

Data Model

- Data Model
 - Data Sets
 - AbsenceAccrualEntryDetails
 - Event Triggers
 - Flexfields
 - List of Values
 - Legal Employer
 - Business Unit
 - Department
 - Absence Plan Name**
 - Person Name
 - Parameters
 - pLegalEmployer
 - pBusinessUnit
 - pDepartment
 - pAbsencePlanName
 - pCalculationDate
 - pPersonName
 - pPersonNumber
 - Bursting

List of Values

Name	Type	Data Source	Reorder
Legal Employer	SQL Query	ApplicationDB_HCM	△ ▽
Business Unit	SQL Query	ApplicationDB_HCM	△ ▽
Department	SQL Query	ApplicationDB_HCM	△ ▽
Absence Plan Name	SQL Query	ApplicationDB_HCM	△ ▽
Person Name	SQL Query	ApplicationDB_HCM	△ ▽

Absence Plan Name: Type: SQL Query

Options ☐ Cache Result

SQL Query

```
select aapft.name
from anc_absence_plans_f_tl aapft,
anc_absence_plans_f_aapf
where sysdate between aapft.effective_start_date and aapft.effective_end_date
and sysdate between aapft.effective_start_date and aapft.effective_end_date
and aapf.absence_plan_id = aapft.absence_plan_id
and aapf.plan_status = 'A' -- added to pick only Active Absence Plans
and aapft.language = 'US'
```

Query Builder

LIST OF VALUES

LOV NAME	TYPE	DATA SOURCE	SQL QUERY	ASSOCIATED WITH PARAMETER
Legal Employer	SQL Query	ApplicationDB_HCM	Refer Legal Employer LOV SQL in LOV SQL Section	pLegalEmployer
Business Unit	SQL Query	ApplicationDB_HCM	Refer Business Unit LOV SQL in LOV SQL Section	pBusinessUnit
Department	SQL Query	ApplicationDB_HCM	Refer Department LOV SQL in LOV SQL Section	pDepartment

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Absence Plan Name	SQL Query	pLegalEmployer	Refer Absence Plan Name LOV SQL in LOV SQL Section	pAbsencePlanName
Person Name	SQL Query	pLegalEmployer	Refer Person Name LOV SQL in LOV SQL Section	pPersonName

LOV SQL SECTION

This Section shows all the SQL which are used for LOV Creation.

LEGAL EMPLOYER LOV SQL



LegalEmployerLOVS
QL.sql

BUSINESS UNIT LOV SQL



BusinessUnitLOVS
QL.sql

DEPARTMENT LOV SQL



DepartmentLOVSQL
.sql

ABSENCE PLAN LOV SQL

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**AbsencePlanLOVSQ
L.sql**

PERSON NAME LOV SQL



**PersonNameLOVSQ
L.sql**

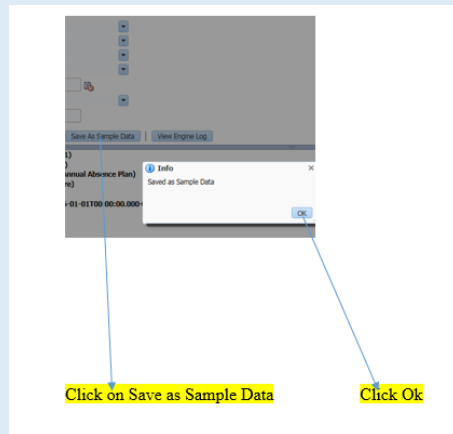
VIEW DATA :

**** - Denotes Optional Parameter * - Denotes Mandatory Parameter Drop Down Arrow Denotes Menu Item (LOV)**

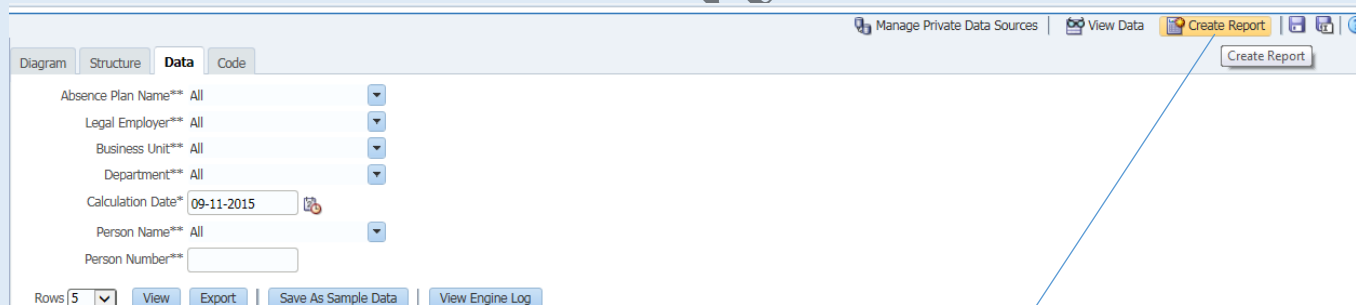
CLICK ON 'SAVE AS SAMPLE DATA':

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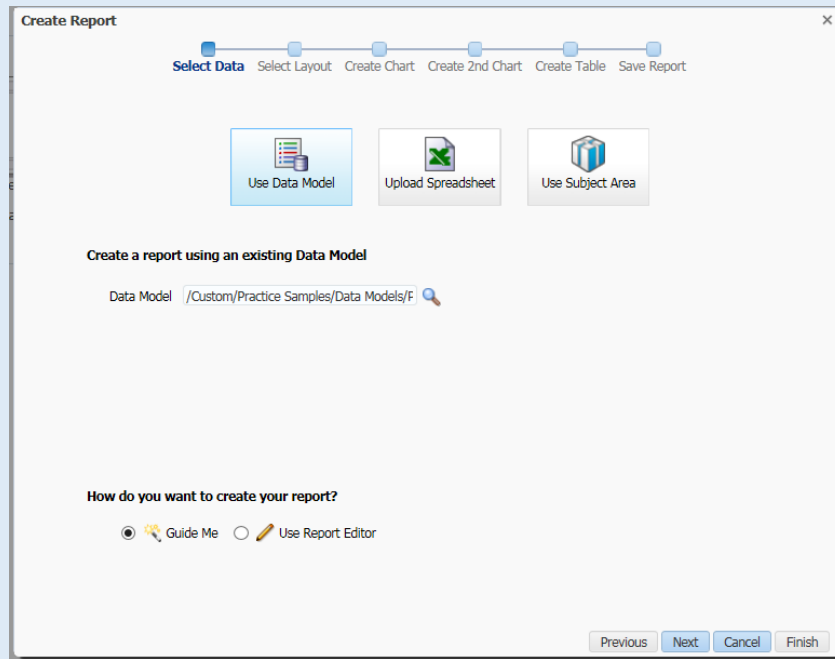


CREATE REPORT



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Click Next and Follow Train Stops :

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The screenshot shows the 'Create Report' dialog box with the 'Select Layout' step selected in the progress bar. The dialog is divided into two main sections: 'Page Options' and 'Layout'.

Page Options:

- Orientation:** Portrait (selected) and Landscape.
- Page Header:** ☐ Page Header
- Page Footer:** ☐ Page Footer

Layout:

- Table:** ☒ (Selected)
- Chart:** ☐
- Pivot Table:** ☐
- Chart and Table:** ☐
- Chart and Pivot Table:** ☐
- Two Charts and Table:** ☐

At the bottom, there are navigation buttons: Previous, Next (highlighted), Cancel, and Finish.

Create Table

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Create Report

Select Data Select Layout Create Chart Create 2nd Chart **Create Table** Save Report

Drag fields from the Data Source to create the table. Sample data is displayed.

Data Source

- DATA_DS
 - pAbsencePlanName
 - pLegalEmployer
 - pBusinessUnit
 - pDepartment
 - pCalculationDate
 - pPersonName
 - pPersonNumber
- G_1
 - PERSON_NUMBER
 - FULL_NAME
 - LEGAL_EMPLOYER
 - BUSINESS_UNIT
 - DEPARTMENT
 - ABSENCE_PLAN_NAME
 - ADJUSTMENT_TYPE
 - ADJUSTMENT_REASON
 - VALUE
 - ACCRUAL_ENTRY_DATE

[Drop Fields Here]

☐ Show Grand Totals Row

Preview Report

Previous Next Cancel Finish

Drag and Drop fields and the Final Report output will look like :

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Absence Plan Name** All
Legal Employer** All
Business Unit** All
Department** All
Calculation Date* 09-11-2015
Person Name** All
Person Number**

PersonAbsenceAccrualEnt...

Legal Employer	Business Unit	Department	Absence Plan Name	Employee Number	Employee Name	Adjustment Type	Adjustment Reason	Accrual Value	Accrual Entry Date
US1 Legal Entity	US1 Business Unit	Consulting South US	Vacation	2	Marlin, Amy	Periodic accruals		12	30-11-2015
US1 Legal Entity	US1 Business Unit	Consulting South US	Vacation	2	Marlin, Amy	Periodic accruals		12	31-12-2015
US1 Legal Entity	US1 Business Unit	Consulting South US	Vacation	2	Marlin, Amy	Carryover		40	01-01-2016
US1 Legal Entity	US1 Business Unit	Consulting South US	Vacation	2	Marlin, Amy	Forfeiture		-184	01-01-2016
US1 Legal Entity	US1 Business Unit	Procurement US	Vacation	3	Roth, Calvin	Periodic accruals		12	30-11-2015
US1 Legal Entity	US1 Business Unit	Procurement US	Vacation	3	Roth, Calvin	Periodic accruals		12	31-12-2015
US1 Legal Entity	US1 Business Unit	Procurement US	Vacation	3	Roth, Calvin	Forfeiture		-184	01-01-2016
US1 Legal Entity	US1 Business Unit	Procurement US	Sick	3	Roth, Calvin	Carryover		120	01-01-2016
US1 Legal Entity	US1 Business Unit	Procurement US	Sick	3	Roth, Calvin	Forfeiture		-120	01-01-2016
US1 Legal Entity	US1 Business Unit	Procurement US	Vacation	3	Roth, Calvin	Carryover		40	01-01-2016