

With Oracle Fusion Transactional Business Intelligence embedded analytics, role-based dashboards, and on-the-fly ad hoc reporting capabilities make data access and interpretation easier than ever before. Users are able to see updates in real-time, and their impact, through embedded analytics. For example, during the compensation budgeting process, a manager is able to see a running tally for reference right on the page. This eliminates the guesswork with dashboards that deliver in-line information while you do your work. Pre-delivered operational reports are enriched with robust and flexible ad hoc query capabilities that access real-time transactional data – no need to push data to a separate warehouse or engage the IT department for a custom report: it is easy, and right at your fingertips.

### **Business Intelligence Composer**

The Business Intelligence Composer is a simple-to-use wizard that allows organizations to quickly and easily create, edit, or view data without requiring an engineering background. With this capability Human Resource organizations can build and deliver reports that the business needs whenever they need it, without waiting for IT support. It is built for the business user.

### **Real Time Ad Hoc Query**

Traditional ad-hoc reporting solutions require a person to have deep domain in their subject area and an understanding of data objects in the relevant tables they needed to report from.

OTBI hides that complexity and transforms the 9000+ reportable data objects into everyday business terminology. Which means if you are looking to see a worker's average performance rating you will find the reporting object named as "Worker's Average Performance Rating".

This is all done by using the standard Oracle query and reporting tool (OBIEE). OBIEE has end user tools (Answers, Dashboards) to provide an easy-to-use interface for business users to perform current state analysis of their business applications. Constructed queries and reports are executed real time against the transactional schema supported by a layer of view objects.

In OTBI, business users can also easily drill on predefined hierarchies, enable action links, compose a dashboard, schedule a report or dashboard for delivery and export data or reports to a variety of file formats. Fusion users can also easily embed an OTBI report or dashboard in a Fusion page through Personalization

### **Integrated with Fusion Applications**

OTBI is fully integrated with Fusion applications (roles, flex fields, lookups, trees). There is no need for additional implementation steps to map security or provide configuration inputs. OTBI needs minimum setup and is ready for use once Fusion Applications are configured and installed.

## We are going to develop the Below OTBI Reports

1. Navigating to Reports and Analytics
2. Roles Required to Run/Create/Modify the OTBI Reports
3. Running Oracle Standard Report
4. Creating Analysis Report for Supplier Details
  - a. Adding the new column to the existing Report
  - b. Remove the Column from the existing Report
  - c. Applying the Prompt (Filter) to the existing Report Column
5. Creating BI Report (Using Data Model) for Purchase Order Details
6. Creating Ad Hoc Report for Expense Details
7. Creating Dashboard Report
8. Creating Dashboard Report with Prompt (Filter)
9. Creating Master-Child Analysis Report with Prompt (Filter)
10. Creating Analysis Report with Multiple Subject Areas



## 1. Navigating to Reports and Analytics

Login to the application with URL

Enter the User name password and click on the Sign in

Sign In  
Oracle Applications Cloud

User ID  
RAJU.CHINTHAPATLA

Password  
.....

Forgot Password

Sign In

Select Language  
English

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ORACLE

2. Once login to the application, we have two options to connect the Analytics report

3. Option 1: Modify the URL to add the analytics

<https://XXXXXXXXXXXXXX.com/analytics/>

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

Create...

Analysis and Interactive Reporting  
Analysis Dashboard More ▾

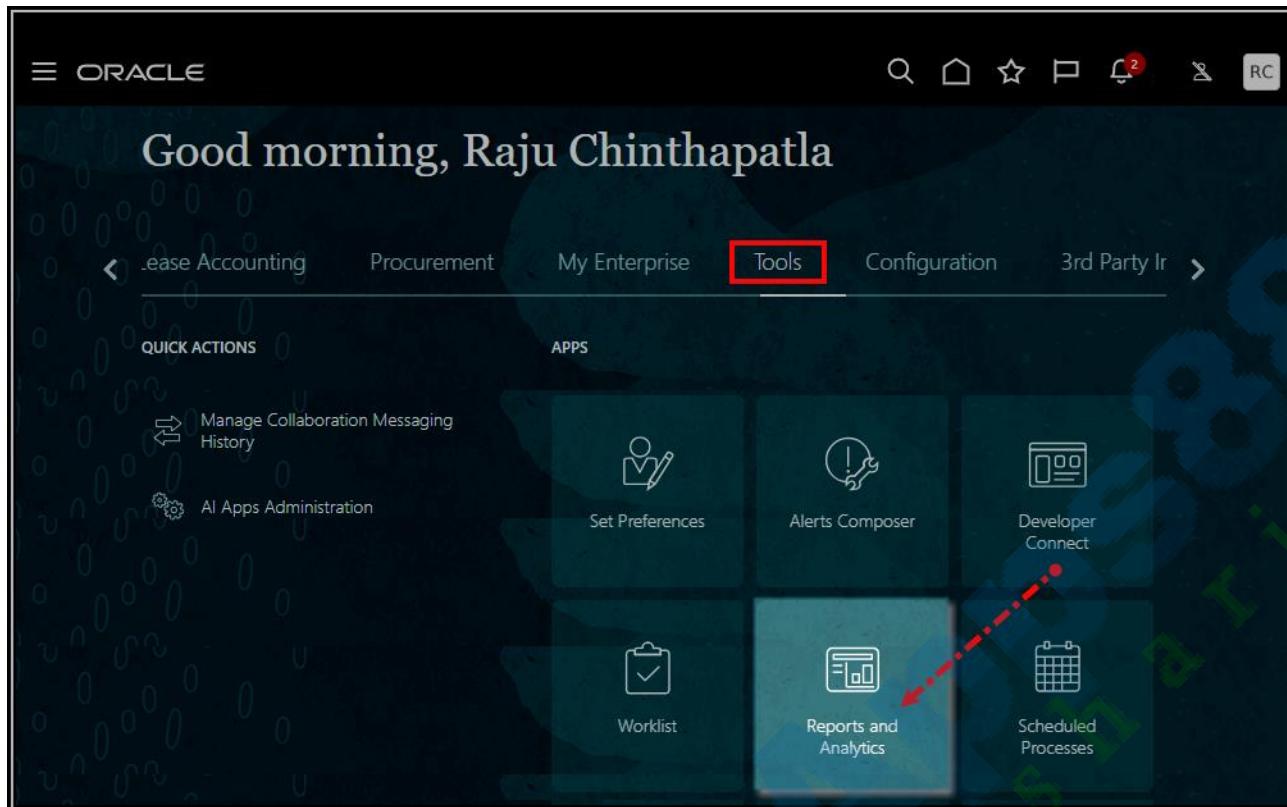
Mobile Application  
Mobile App

Published Reporting  
Report Report Job More ▾

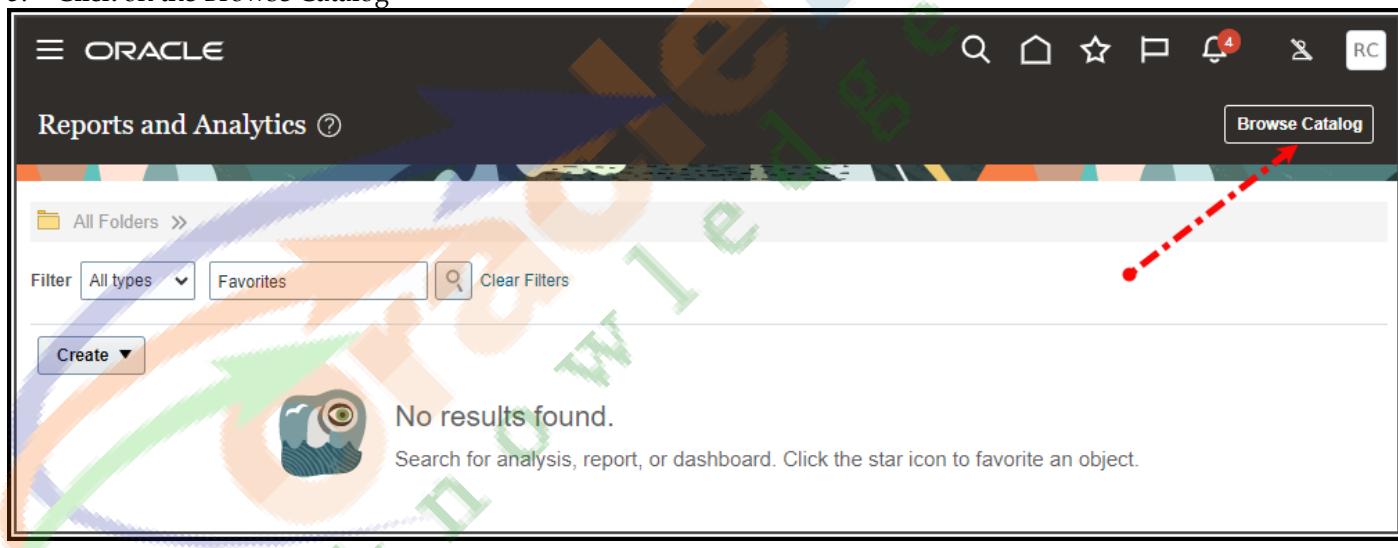
Recent  
Recently opened or edited items will be displayed here.

Download Desktop Tools

4. Option 2: Select Reports and Analytics under Tools in the Navigator.



5. Click on the Browse Catalog



## 2. Roles Required to Run/Create/Modify the OTBI Reports

### BI Consumer Role

The predefined OTBI Transaction Analysis Duty roles inherit the BI Consumer Role. You can configure custom roles to inherit BI Consumer Role so that they can run reports but not author them.

### BI Author Role

The BI Author Role inherits the BI Consumer Role. Users with BI Author Role can create, edit, and run OTBI reports.

### BI Administrator Role

BI Administrator Role is a superuser role. It inherits BI Author Role, which inherits BI Consumer Role. The predefined Sales Cloud job roles do not have BI Administrator Role access.

BI Administrator Role Performs administrative tasks such as creating and editing dashboards and modifying security permissions for reports, folders, and so on.

### 3. Running Oracle Standard Report

On the *Reports and Analytics* page, under the **Contents** section, click the **Expand** icon to the left of Shared Folders and then click the **Expand** icon to the left of the applicable functional area folder into which you want to drill. In this example, we are drilling in to Financials and scrolling down to General Ledger and further drilling in to access the General Journals Report.

Nav: Shared Folder → Financials → General Ledger → Journals → General Journal Report

The screenshot shows the Oracle Fusion Catalog interface. The top navigation bar includes Home, Catalog, Favorites, Dashboards, Create, Open, and a search bar. The main area has tabs for User View, Catalog, Favorites, Dashboards, Create, and Open. The Location is set to /Shared Folders/Financials/Gen. A 'Show Hidden Items' checkbox is checked. On the left, there's a 'Folders' tree view with categories like General Ledger, Account Analysis, Australia, Journals, Data Models, General Journals Report (which is highlighted with a blue border), Setup, Trial Balances, and Intercompany Accounting. To the right, a list of reports is displayed with columns for Type, Name, Last Modified, and Owner. One report, 'General Journals Report', is shown with a description: 'Provides journal activity for a given period.' It has three action buttons: Open, Edit, and More. A red dashed arrow points from the 'General Journals Report' link in the tree view to the report details pane.

6. Click the **General Journals Report** and then in the pop-out, click the **Open** link

This screenshot shows the Oracle Fusion Catalog interface after clicking the 'General Journals Report' link. A large pop-out window displays the report's details. The report name is 'General Journals Report', last modified on 3/29/24 at 8:28 PM, and owned by the current user. The description is 'Provides journal activity for a given period.' Below the description are three buttons: Open, Edit, and More. A red dashed arrow points from the 'Open' link in the main catalog view to the 'Open' button in the pop-out window.

7. A tab displaying the **General Journals Report** Parameters is opened in the pane on the right. Enter the required parameters and any additional parameters, then click the apply button.
8. Depending upon the Parameters entered, the results are displayed in the region below the Parameters.

**General Journals Report**

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

Ledger Set: US Ledger Set  
Ledger: US Primary Ledger  
\* Accounting Period: 09-24  
Entered Currency: USD  
Approval Status: --Select Value--  
Accounting Date Between:

Account: --Select Value--  
Source: --Select Value--  
Category: --Select Value--  
Journal Batch: --Select Value--  
Batch Status: --Select Value--

Balance Type: --Select Value--  
Fund Status: --Select Value--

1

2

**General Journals Report**

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

XX Test Journal Batch - 0906	Manual	XX Test Journal - 0906	Manual	1	Unposted	XX Test Journal Line 01 - 0906	Actual	Not attempted	101.10.63580.121.000.000	USD
				2	Unposted	XX Test Journal Line 02 - 0906	Actual	Not attempted	101.10.63580.121.000.000	USD

**Note:** Depending upon the specific report and your web browser settings, you may need to use the vertical and horizontal scrollbars to view all of the data.

9. Scroll to the bottom of the bottom of the report.
10. Depending upon your access to a specific report, you may have the ability to Edit, Refresh, Print and/or Export a specific Report (also referred to as an Analysis within OTBI).

**General Journals Report**

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

Ledger Set: US Ledger Set  
Account: --Select Value--  
Balance Type: --Select Value--  
Ledger: US Primary Ledger  
Source: --Select Value--  
Fund Status: --Select Value--  
\* Accounting Period: 09-24  
Category: --Select Value--  
Entered Currency: USD  
Journal Batch: --Select Value--  
Approval Status: --Select Value--  
Batch Status: --Select Value--  
Accounting Date Between:     
Apply Reset ▾

**General Journals Report**

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

XX Test Journal Batch - 0906	Manual	XX Test Journal - 0906	Manual	1	Unposted	XX Test Journal Line 01 - 0906	Actual	Not attempted	101.10.63580.121.000.000	USD
				2	Unposted	XX Test Journal Line 02 - 0906	Actual	Not attempted	101.10.63580.121.000.000	USD
		XX Test Journal - 0906 Total								
	Manual Total									
XX Test Journal Batch - 0906 Total										
batch01	Manual	090924jurnal	Adjustment	1	Unposted	Testing jurnal Cash	Actual	Not attempted	101.10.11200.000.000.000	USD
				2	Unposted	Testing jurnal Cash	Actual	Not attempted	101.10.47000.000.000.000	USD
	Manual Total									
batch01 Total		090924jurnal Total								
Grand Total										
<a href="#">Edit</a> - <a href="#">Refresh</a> - <a href="#">Print</a> - <a href="#">Export</a>										

Report Option	Definition
Edit	Provides the user the ability to edit the current version of the Report (add additional columns, etc.). This option also allows the user to choose to "Save As" instead of overwriting the existing version.
Refresh	Provides the user the ability to refresh the results of the current Report.
Print	Provides the user the ability to view the current Report in a printable PDF version or a Printable HTML version.
Export	Provides the user the ability to export the current Report to PDF, Excel (2003, 2007+), PowerPoint (2003, 2007+), Web Archive (mht), or to a Data file (CSV Format, Tab delimited Format or XML Format).

11. Click the Print link and select Print link and select **Printable PDF**.

Ledger US Primary Ledger  
Ledger Currency USD

Accounting Period	Journal Batch	Source	Journal Name	Category	Journal Line Number	Batch Status	Description	Balance Type	Fund Status	Account	Entered Currency	Stati
09-24	Payables A 7203343000001 7203343 N	Payables	09-24 Purchase Invoices	Purchase Invoices	1	Unposted	Journal Import Created	Actual	Not attempted	101.10.22100.000.000.000	USD	
					2	Unposted	Journal Import Created	Actual	Not attempted	101.10.63530.110.000.000	USD	

12. The Printable PDF is displayed in a separate browser window. Use the PDF buttons to print, download or modify the current view within the browser window.

Ledger Set US Ledger Set  
Ledger US Primary Ledger  
Accounting Period 09-24  
Entered Currency USD  
Approval Status None  
Accounting Date Between None - None

Ledger US Primary Ledger  
Ledger Currency USD

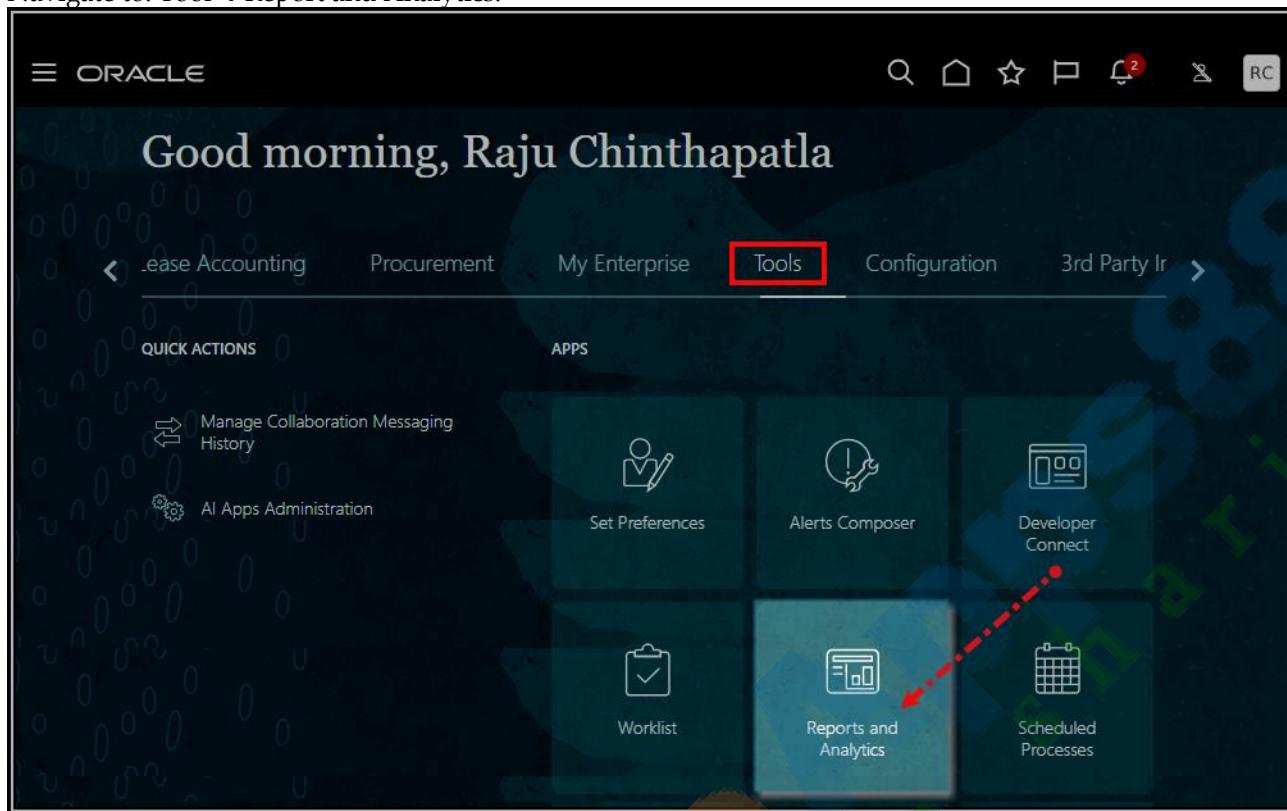
Accounting Period	Journal Batch	Source	Journal Name	Category	Journal Line Number	Batch Status	Description	Balance Type	Fund Status	Account	Entered Currency
09-24	Payables A 7203343000001 7203343 N	Payables	09-24 Purchase Invoices	Purchase Invoices	1	Unposted	Journal Import Created	Actual	Not attempted	101.10.22100.000.000.000	USD
					2	Unposted	Journal Import Created	Actual	Not attempted	101.10.63530.110.000.000	USD

13. Click the Close button (X on the Printable PDF tab to close out).

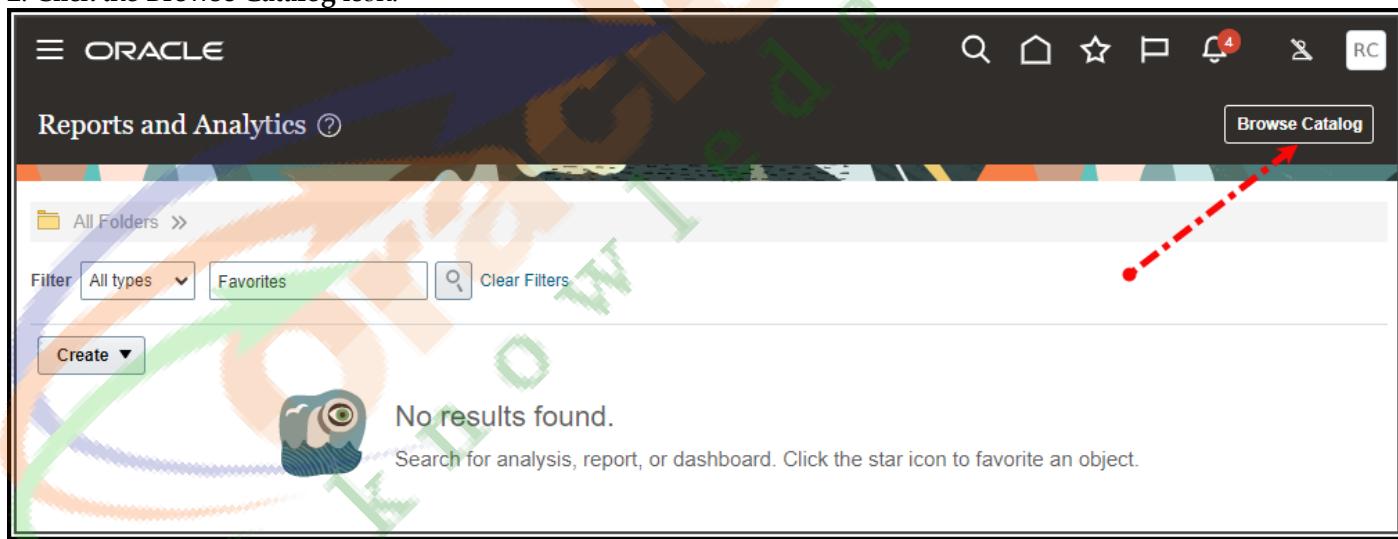
14. Click the Home icon when finished.

#### 4. Creating Analysis Reports for Suppliers

Navigate to: Tool → Report and Analytics.

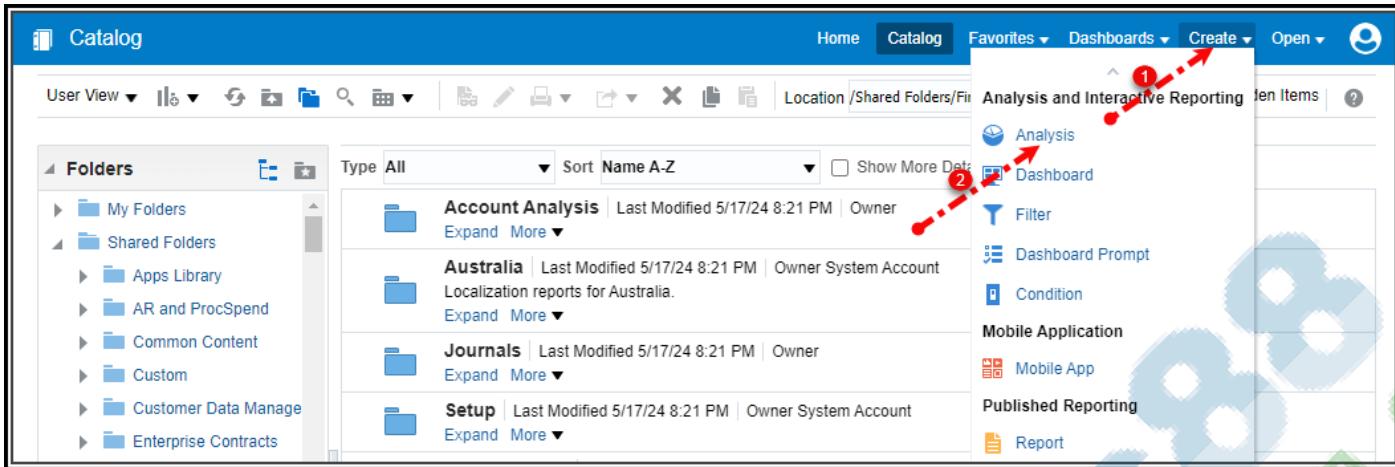


2. Click the **Browse Catalog** icon.



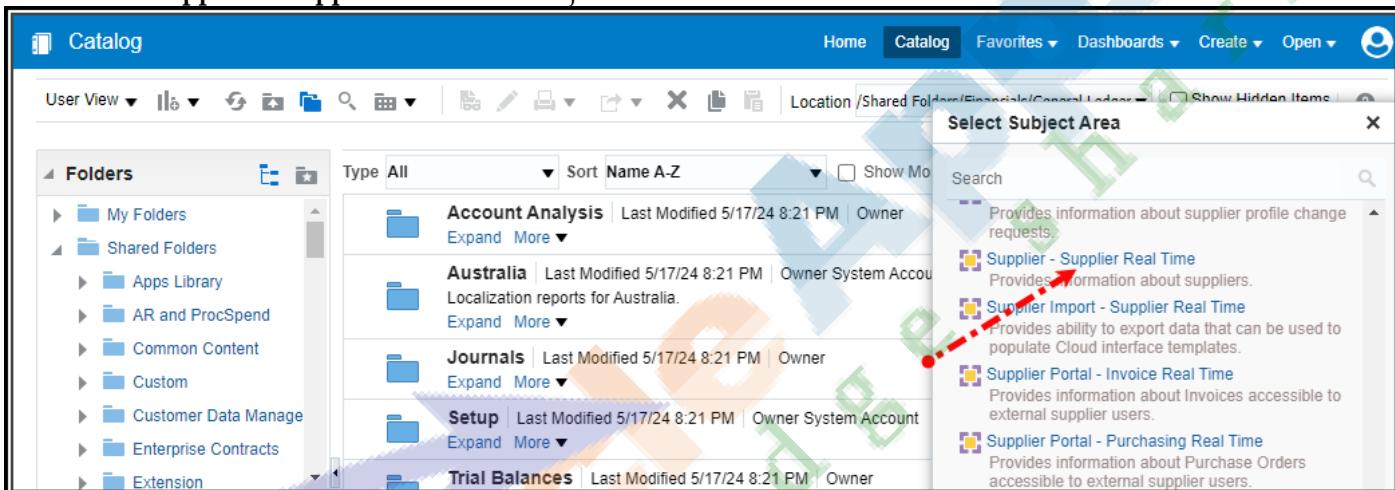
3. Click Create (New).

4. Select the **Analysis** option from the menu on the top-left of the page.



## Creating the Report

5. Select the **Supplier - Supplier Real Time** subject area.



6. Expand the Folders and select the field and Double-click on the field, it will populate on the right side  
Or select the field and Drag and drop to right side.

Untitled

Criteria Results Prompts Advanced

**Subject Areas**

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
- Supplier Sites
  - Consigned Inventory
  - General
  - Invoicing
- Procurement BU
  - Business Unit
  - Business Unit Status
  - Created
  - Created By

**Selected Columns**

Supplier Profile	
Supplier Name	Supplier Number
Business Unit	

Add Filters Here

7. Click the Results tab, Data will display in Compound Layout and click on Save Analysis icon

Untitled

Criteria **Results** Prompts Advanced

**Subject Areas**

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
  - Supplier Sites
  - Supplier Spend Authorization
  - Suppliers
- Catalog
- Views
  - Title
  - Table

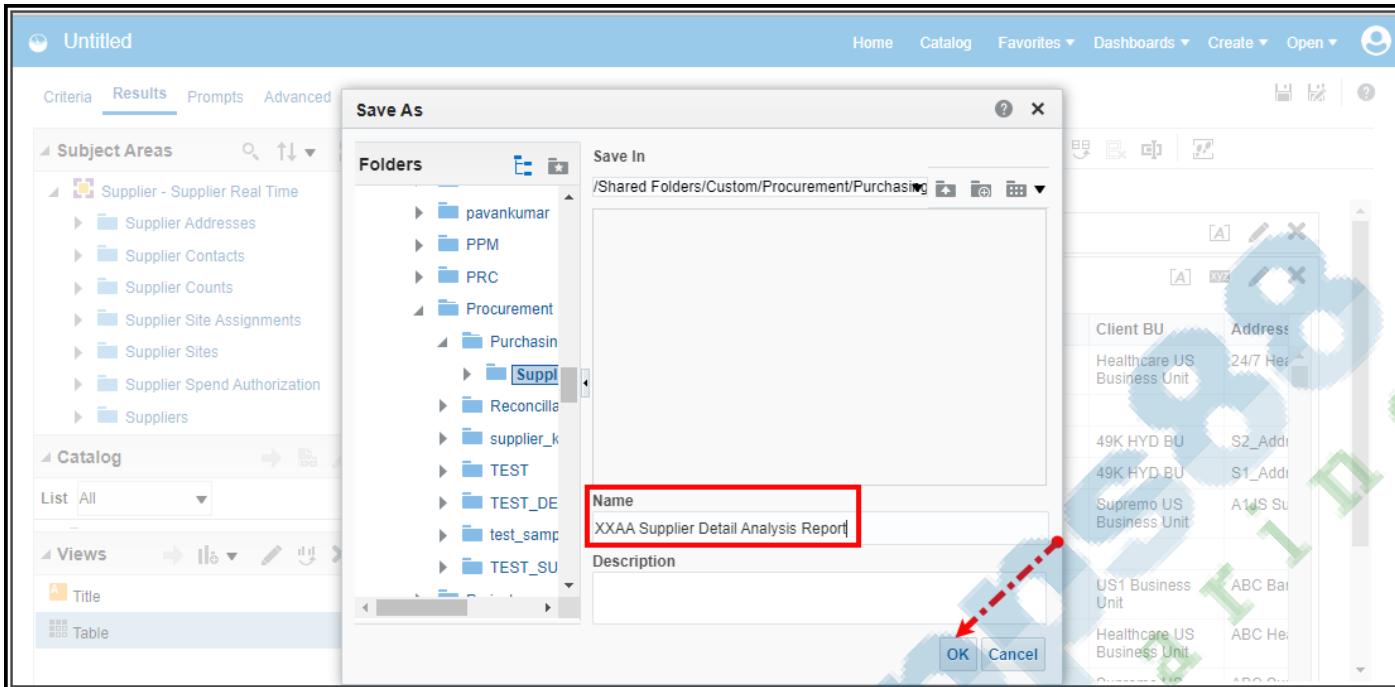
**Compound Layout**

Table

Supplier Name	Supplier Number	Business Unit	Site	Client BU	Address
24/7 Community Hospital Group	1416	Healthcare US Business Unit	24/7 Healthcare	Healthcare US Business Unit	24/7 Health
49K	1479				
49K Home supplier	1480	49K HYD BU	S2_Address	49K HYD BU	S2_Ad
49K Office Supplies	1477	49K HYD BU	S1_Address	49K HYD BU	S1_Ad
A1 Juice Supply	1373	Supremo US Business Unit	A1JS Supremo US	Supremo US Business Unit	A1JS Su
ABC	123				
ABC Bank	1359	US1 Business Unit	ABC Bank US1	US1 Business Unit	ABC Ban
ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	Healthcare US Business Unit	ABC He
ABC Contractors	1299	Supreme US	ABC Supreme US	Supreme US	ABC Con

Selection Steps

08. Save the report in custom folder.



09. Click Edit icon on Table area

Supplier Name	Supplier Number	Business Unit	Site	Client BU	Address
24/7 Community Hospital Group	1416	Healthcare US Business Unit	24/7 Healthcare	Healthcare US Business Unit	24/7 Head
49K	1479				
49K Home supplier	1480	49K HYD BU	S2_Address	49K HYD BU	S2_Addr
49K Office Supplies	1477	49K HYD BU	S1_Address	49K HYD BU	S1_Adde
A1 Juice Supply	1373	Supremo US Business Unit	A1JS Supremo US	Supremo US Business Unit	A1JS Su
ABC	123				
ABC Bank	1359	US1 Business Unit	ABC Bank US1	US1 Business Unit	ABC Ban
ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	Healthcare US Business Unit	ABC He

10. To get the group wise values in the report perform the below step

In the Layout Pane, Under the Columns and Measures section, click and drag Supplier Type into **Sections Area** Click on the Done button to apply the changes

**XXAA Supplier Detail Analysis Report**

Criteria Results Prompts Advanced

Table

Editing from: "Compound Layout" Done Revert

**Subject Areas**

- Status
- Supplier Customer Number
- Supplier Hierarchy Spend Summary
- Supplier Name
- Supplier Number
- Supplier Spend Summary
- Supplier Type
- Tax Classification Code
- Tax Officer Number
- Tax Officer Number (Description)

**Catalog**

List All

- My Folders
- Shared Folders

**Layout**

Drag/drop measures, columns and hierarchies to determine table layout.

Table Prompts  $\Sigma$  XYZ

Drop here for Table prompts

Sections  $\Sigma$  XYZ

Supplier Type Drop here for a sectioned Table

Selection Steps

Supplier Name	Supplier Number	Business Unit	Site	Client BU	Address
24/7 Community Hospital Group	1416	Healthcare US Business Unit	24/7 Healthcare	Healthcare US Business Unit	24/7 Health
49K	1479				
49K Home supplier	1480	49K HYD BU	S2_Address	49K HYD BU	S2_Ad
49K Office Supplies	1477	49K HYD BU	S1_Address	49K HYD BU	S1_Ad
Δ1 Juice Supply	1373	Supremo US	Δ1 IS Supremo US	Supremo US	Δ1 IS Su

**XXAA Supplier Detail Analysis Report**

Criteria Results Prompts Advanced

Table

Editing from: "Compound Layout" Done Revert

**Subject Areas**

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
  - Supplier Sites
  - Supplier Spend Authorization
  - Suppliers
  - Income Tax
  - Supplier Bank Accounts

**Catalog**

List All

- My Folders
- Shared Folders

**Layout**

Contractor

Supplier Name	Supplier Number	Business Unit	Site	Client BU	Address Name
Eric Whims	1452	Supremo US Business Unit	Eric Whims Supremo US	Supremo US Business Unit	Eric Whims Supremo US

Insurance Company

Supplier Profile

Supplier Type

Table XYZ

Columns and Measures  $\Sigma$  XYZ

Report will have divided into groups based on supplier type

15. Click on the Edit button to modify the column properties

16. Click on the Field properties, The Edit Format Window opens to allow a user to format the display of the field

- The Column Format tab can change the name of the column.
- The Data Format tab can change the format of the data to be shown.
- Conditional Format tab can add a condition to the column in order to highlight that

Editing from: "Compound Layout" Done Revert

**Subject Areas**

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
  - Supplier Sites
  - Supplier Spend Authorization
- Suppliers
  - Income Tax
  - Supplier Bank Accounts

**Catalog**

List All

**Table**

**Layout**

**Sections**

**Table**

**Columns and Measures**

**Supplier Profile**

**Supplier Type**

**Supplier Name**

**Supplier Number**

**Business Unit**

**Supplier Site Details**

**Supplier Site**

**Site**

**Client BU**

### 17. Modify the column properties

**Column Properties**

Style Column Format Data Format Conditional Format Interaction Write Back

**Font**

Family Default (System) Size

Color

Style Default (System) Effects Default (System)

**Cell**

Horizontal Alignment Default (Left) Background Color

Vertical Alignment Default (Top)  Wrap Text

Image Select Image Position Default (System)

**Border**

Position Default (System) Border Style Default (System)

Border Color

Additional Formatting Options

Custom CSS Style Options (HTML Only)

### 18. After clicking on Format Headings, the Edit Format Window opens to allow a user to format the display of the field.

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Table

**Subject Areas**

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
  - Supplier Sites
  - Supplier Spend Authorization
- Suppliers
  - Income Tax
  - Supplier Bank Accounts

**Catalog**

Editing from: "Compound Layout" Done Revert

**Contractor**

**Layout**

Supplier Profile

Supplier Type

**Table xyz**

Columns and Measures  $\Sigma$  xyz

Supplier Profile

Supplier Name  $\Sigma$  Supplier Number  $\Sigma$  Business Unit  $\Sigma$  Site  $\Sigma$  Client BU

Hidden  
New Calculated Item...  
Aggregation Rule  
Duplicate Layer  
Remove Column

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Table

**Subject Areas**

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
  - Supplier Sites
  - Supplier Spend Authorization
- Suppliers
  - Income Tax
  - Supplier Bank Accounts

**Catalog**

Edit Format

Caption **Supplier Num**

Font

Family Default (System) Size

Color Style Effects

Cell

Horizontal Alignment Default (System) Vertical Alignment Default (System) Wrap Text

Background Color

Border

Position Border Style Border Color

Additional Formatting Options Custom CSS Style Options (HTML Only)

OK Cancel

19. Adding filter to the report, move to the Criteria tab and click on the Filter icon and select the filed for filter the report

20. Select the Operator and value and click on OK button

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

New Filter

Column: Supplier Type  
Operator: contains any  
Value: Supplier

OK Cancel

21. Click on the result tab to show the report data and save the report

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Subject Areas

Catalog

Views

Title

Compound Layout

XXAA Supplier Detail Analysis Report

Supplier Type	Supplier Name	Supplier Num	Business Unit	Site	Client BU	Ad
Supplier	49K Home supplier	1480	49K HYD BU	S2_Address	49K HYD BU	S2_Ad
Supplier	ABC	123				
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	Healthcare US Business Unit	AB
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	Supremo US Business Unit	AB
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Norway	Sweden Business Unit	AB

22. To run the report, move to Catalog and click on the Open link on report

The screenshot shows the Oracle OTBI Catalog interface. On the left, there is a sidebar with 'Folders' containing 'My Folders', 'Shared Folders', 'Custom', and 'Apps Library'. The main area displays a report titled 'XXAA Supplier Detail Analysis Report' with a status bar indicating it was last modified on 9/9/24 at 4:24 PM by owner RAJU CHINTHAPATLA. Below the report title are 'Open', 'Edit', and 'More' buttons. A red dashed arrow points from the 'Open' button to the report preview area.

23. Click on the Export to download the report into available formats  
Export → Formatted → PDF

The screenshot shows the 'XXAA Supplier Detail Analysis Report' page. It features a table with columns: Supplier Type, Supplier Name, Supplier Num, Business Unit, Site, Client BU, and Ad. A context menu is open at the bottom of the page, listing 'Edit', 'Refresh', 'Print', 'Export', 'Add to Briefcase', 'Formatted', 'Data', and 'Copy'. A red dashed arrow points to the 'PDF' option in the 'Export' submenu, which is highlighted with a red box.

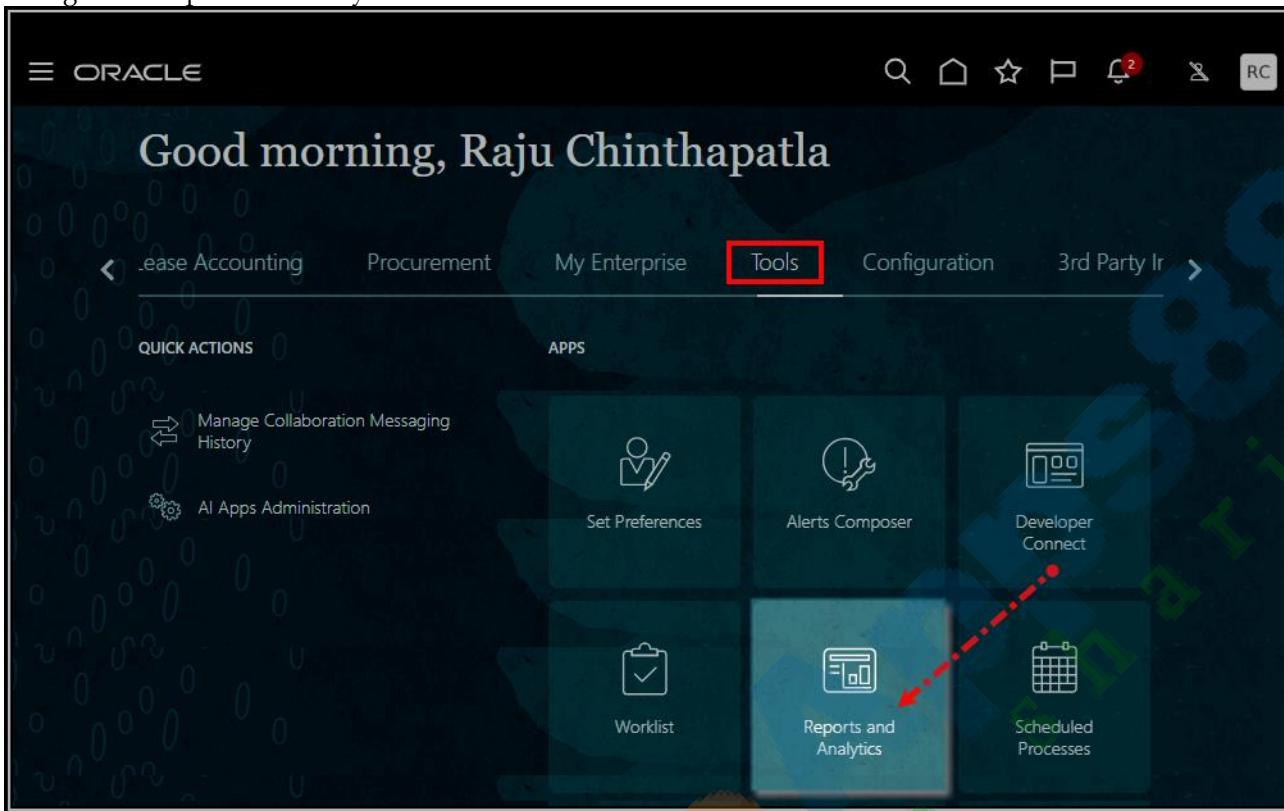
Supplier Type	Supplier Name	Supplier Num	Business Unit	Site	Client BU	Ad
Supplier	49K Home supplier	1480	49K HYD BU	S2_Address	49K HYD BU	S2_Ad
Supplier	ABC	123				
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	Healthcare US Business Unit	AB
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	Supremo US Business Unit	AB
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Norway	Sweden Business Unit	AB
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Sweden	Sweden Business Unit	AB
Supplier	ABC Consulting	1288	US1 Business Unit	ABC US1	US1 Business Unit	AB
Supplier	ABCA	124				
Supplier	ABCAB	125				
Supplier	ABCC	126				
Supplier	ABCG	13				

**XXAA Supplier Detail Analysis Report**

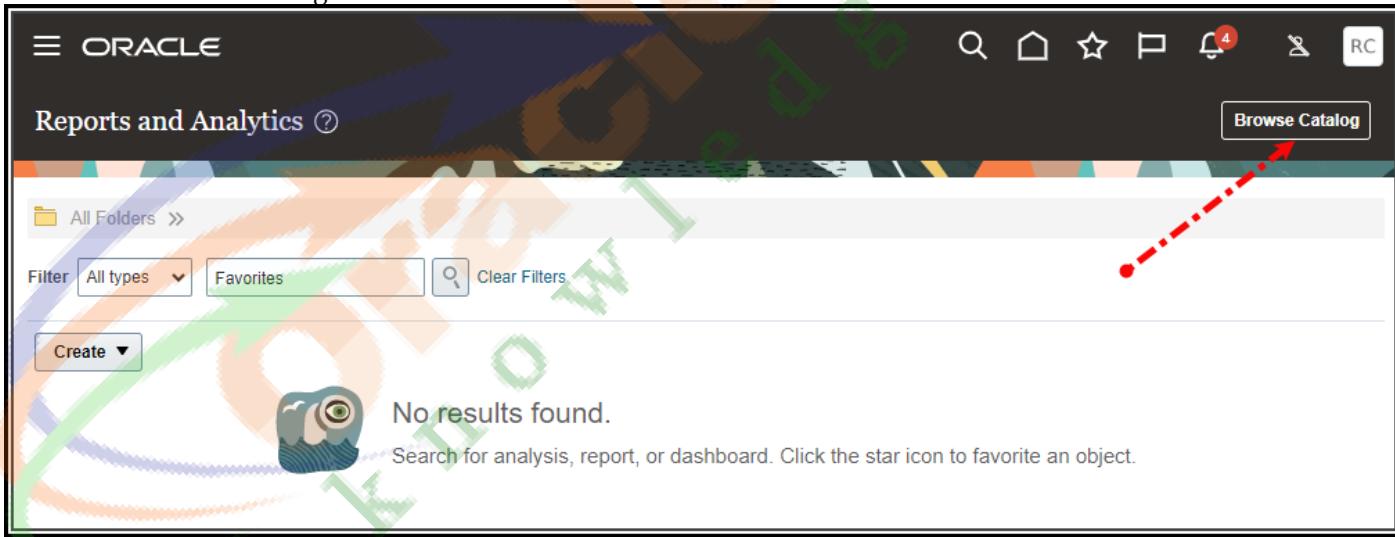
Supplier Type	Supplier Name	Supplier Num	Business Unit	Site	Client BU	Address Name
Supplier	49K Home supplier	1480	49K HYD BU	S2_Address	49K HYD BU	S2_Address
Supplier	ABC	123				
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	Healthcare US Business Unit	ABC Healthcare
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	Supremo US Business Unit	ABC Supremo US
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Norway	Sweden Business Unit	ABC Norway

#### 4 a. Adding the new column to the existing Report

Navigate to: Report and Analytics.



2. Click the Browse Catalog icon.



Move to the folder and click on the Edit in the report

Catalog

User View ▾

Type All Sort Name A-Z Show More Details

**XXAA Supplier Detail Analysis Report** | Last Modified 9/9/24 5:17 PM | Owner RAJU CHINTHAPATLA

Open Edit More ▾

Folders

- Procurement
  - Purchasing
  - Reconciliation
  - Suppliers**
- Projects
- Public Sector
- Redwood
- RelationshipViewer

Click on the Table Edit view

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Subject Area

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignment
  - Supplier Sites
  - Supplier Spend Authorization
  - Suppliers**

Compound Layout

Title: XXAA Supplier Detail Analysis Report

Table

Supplier Type	Supplier Name	Supplier Number	Business Unit	Client BU	Site	Address
Contractor	Eric Whims	1452	Supremo US Business Unit	Supremo US Business Unit	Eric Whims Supremo US	Eric Whims Supremo US
Insurance Company	Washington Insurance	1400	Healthcare US Business Unit	Healthcare US Business Unit	Washington-HC	Wash

Expand the Folders and select the field and Double-click on the field, it will populate on the right side Layout Section  
Or select the field and Drag and drop to right side.

Click on Done

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Table

**Subject Area:**

- Supplier Contacts
  - Contact Details
    - Address Name
    - Administrative Co...
    - Created
    - Created By
    - E-Mail
    - Fax
    - Fax Area Code
    - Fax Country Cod...
    - First Name
    - Inactive Date
    - Job Title
    - Last Name

**Layout**

Editing from: "Compound Layout"

Supplier Type	Supplier Name	Supplier Number	Business Unit	Client BU	Site	Address Name
Contractor	Eric Whims	1452	Supremo US Business Unit	Supremo US Business Unit	Eric Whims Supremo US	Eric Whims Supremo US
Insurance Company	Washington Insurance	1400	Healthcare US Business Unit	Healthcare US Business Unit	Washington-HC	Washington-HC

Procurement BU      Supplier Site Assignment De...      Supplier Site Details      Address Details      Contact Details

Business Unit      Client BU      Site      Address Name      Last Name

Save the Report

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

**Subject Area:**

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Contact Details
    - Address Name
    - Administrative Co...
    - Created
    - Created By
    - E-Mail

**Compound Layout**

Title: XXAA Supplier Detail Analysis Report

Table

Supplier Type	Supplier Name	Supplier Number	Business Unit	Client BU	Site	Address Name
Contractor	Eric Whims	1452	Supremo US Business Unit	Supremo US Business Unit	Eric Whims Supremo US	Eric Whims Supremo US
Insurance Company	Washington Insurance	1400	Healthcare US Business Unit	Healthcare US Business Unit	Washington-HC	Washington-HC

To run the report, move to Catalog and click on the Open link on report

Catalog

User View

Folders

- PRC
- Procurement
  - Purchasing
  - Reconciliation
  - Suppliers
  - Projects

Type All Sort Name A-Z Show More Details

XXAA Supplier Detail Analysis Report | Last Modified 9/9/24 5:25 PM | Owner RAJU CHINTHAPATLA

Open Edit More

Verify the newly added column

XXAA Supplier Detail Analysis Report Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

### XXAA Supplier Detail Analysis Report

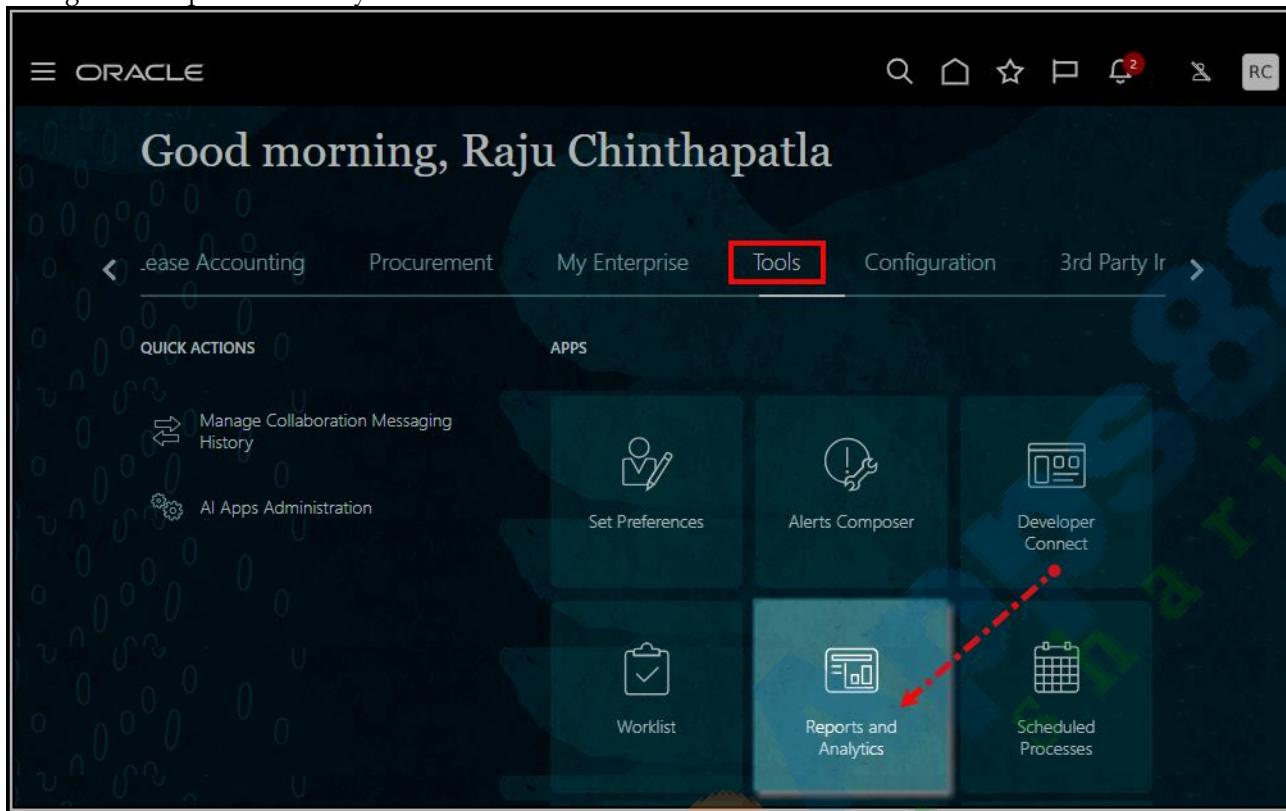
Supplier Name	Supplier Number	Business Unit	Client BU	Site	Address Name	Last Name
Eric Whims	1452	Supremo US Business Unit	Supremo US Business Unit	Eric Whims Supremo US	Eric Whims Supremo US	Whims
Washington Insurance	1400	Healthcare US Business Unit	Healthcare US Business Unit	Washington-HC	Washington-HC	Zeller
ABC Consulting	1288	Sweden	Sweden	ABC Sweden	ABC Sweden	Abbott

Edit - Refresh - Print - Export - Add to Briefing Book - Email - Copy

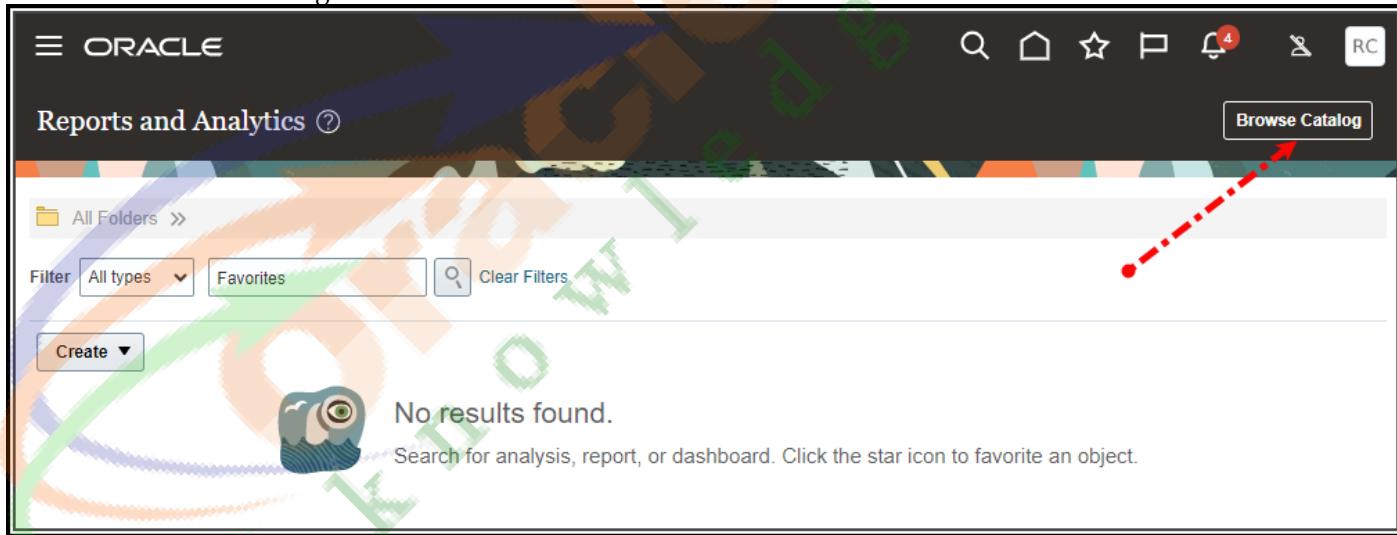


**4 b. Remove the Column from the existing Report**

Navigate to: Report and Analytics.



2. Click the Browse Catalog icon.



Move to the folder and click on the Edit in the report

Catalog

User View ▾

Type All Sort Name A-Z Show More Details

**XXAA Supplier Detail Analysis Report** | Last Modified 9/9/24 5:17 PM | Owner RAJU CHINTHAPATLA

Open Edit More ▾

Folders

- Procurement
  - Purchasing
  - Reconciliation
  - Suppliers**
- Projects
- Public Sector
- Redwood
- RelationshipViewer

Click on the Table Edit view

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Subject Area

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignment
  - Supplier Sites
  - Supplier Spend Authorization
  - Suppliers**

Compound Layout

Title: XXAA Supplier Detail Analysis Report

Table

Supplier Type	Supplier Name	Supplier Number	Business Unit	Client BU	Site	Address
Contractor	Eric Whims	1452	Supremo US Business Unit	Supremo US Business Unit	Eric Whims Supremo US	Eric Whims Supremo US
Insurance Company	Washington Insurance	1400	Healthcare US Business Unit	Healthcare US Business Unit	Washington-HC	Wash

In the Layout section, Select the column, Click on More Options, click on the Remove Column, and select Ok

The screenshot shows the Oracle OTBI interface for creating reports. A modal dialog box is displayed, stating: "The selected column will be removed from all views." It contains two buttons: "OK" and "Cancel". A red dashed arrow labeled "3" points to the "OK" button. In the background, the report layout editor is visible. A context menu is open over a column header, specifically over the "Business Unit" column. The menu items include "Column Properties...", "Format Headings...", "Format Values...", "Hidden", "New Calculated Item...", "Aggregation Rule...", "Duplicate Layer", and "Remove Column". A red dashed arrow labeled "1" points to the "Remove Column" option. Another red dashed arrow labeled "2" points to the "Business Unit" column header.

Supplier Type	Supplier Name	Supplier Number	Business Unit	Client BU	Site	Address Name
Contractor	Eric Whims	1452	Supremo US Business Unit	Supremo US Business Unit	Eric Whims	Supremo US
Insurance Company	Washington Insurance	1400	Healthcare US Business Unit	Healthcare US Business Unit	Washington-HC	Washington-HC

Click on Done and Save the Report

The screenshot shows the same OTBI interface after saving the changes. The report layout now includes a new section titled "Supplier Site Assignment De...". The "Business Unit" column has been successfully removed from the main table. The "Done" button is highlighted with a red dashed arrow.

Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Name
Contractor	Eric Whims	1452	Supremo US Business Unit	Eric Whims	Supremo US
Insurance Company	Washington Insurance	1400	Healthcare US Business Unit	Washington-HC	Washington-HC

To run the report, move to Catalog and click on the Open link on report

The screenshot shows the Oracle OTBI Catalog interface. On the left, there is a sidebar titled 'Folders' containing categories like PRC, Procurement, Purchasing, Reconciliation, Suppliers, and Projects. The main area displays a report titled 'XXAA Supplier Detail Analysis Report'. The report's details are shown at the top: 'Last Modified 9/9/24 5:25 PM | Owner RAJU CHINTHAPATLA'. Below this, there are buttons for 'Open', 'Edit', and 'More'. A red arrow points from the 'Open' button to the report card.

Verify the Removed column

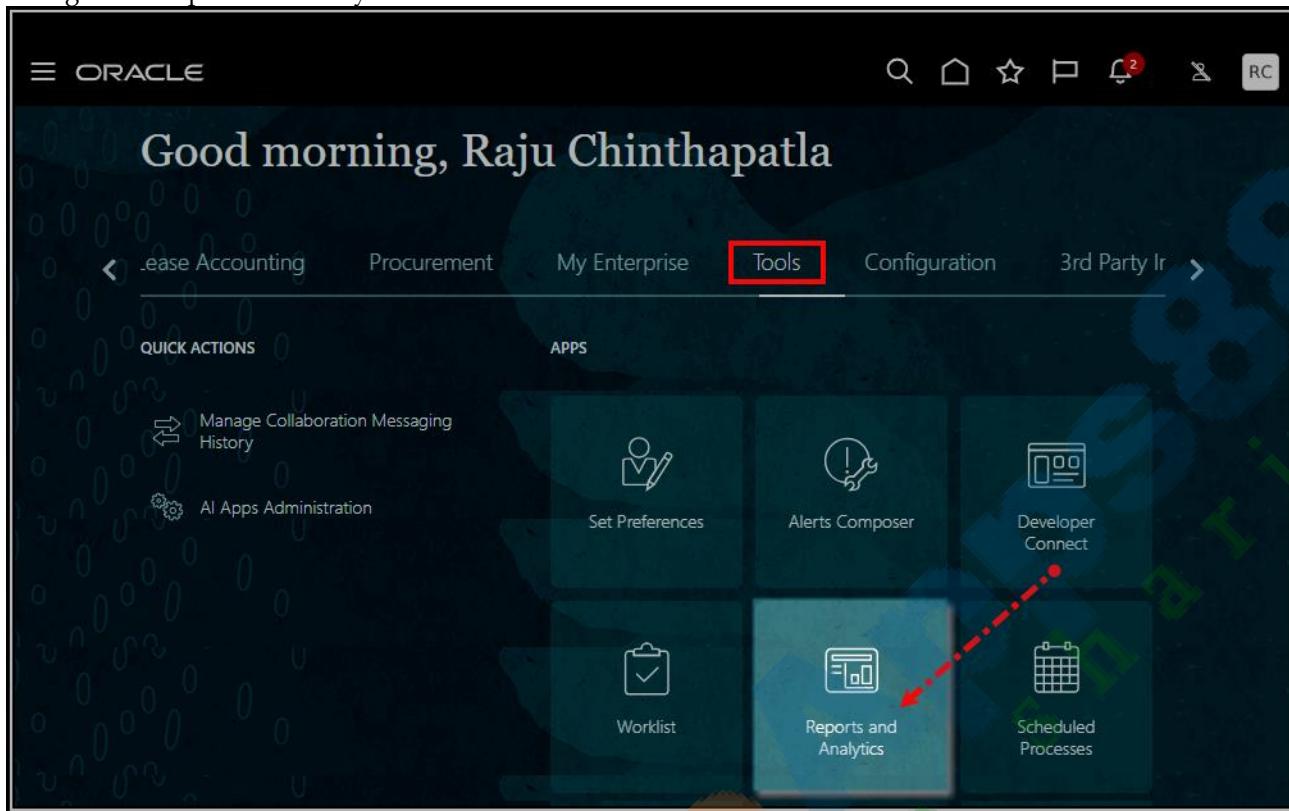
The screenshot shows the 'XXAA Supplier Detail Analysis Report' page. At the top, there is a navigation bar with links for Home, Catalog, Favorites, Dashboards, Create, and Open. The main content area is titled 'XXAA Supplier Detail Analysis Report' and contains a table with the following data:

Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Name
Contractor	Eric Whims	1452	Supremo US Business Unit	Eric Whims Supremo US	Eric Whims Supremo US
Insurance Company	Washington Insurance	1400	Healthcare US Business Unit	Washington-HC	Washington-HC
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Sweden	ABC Sweden

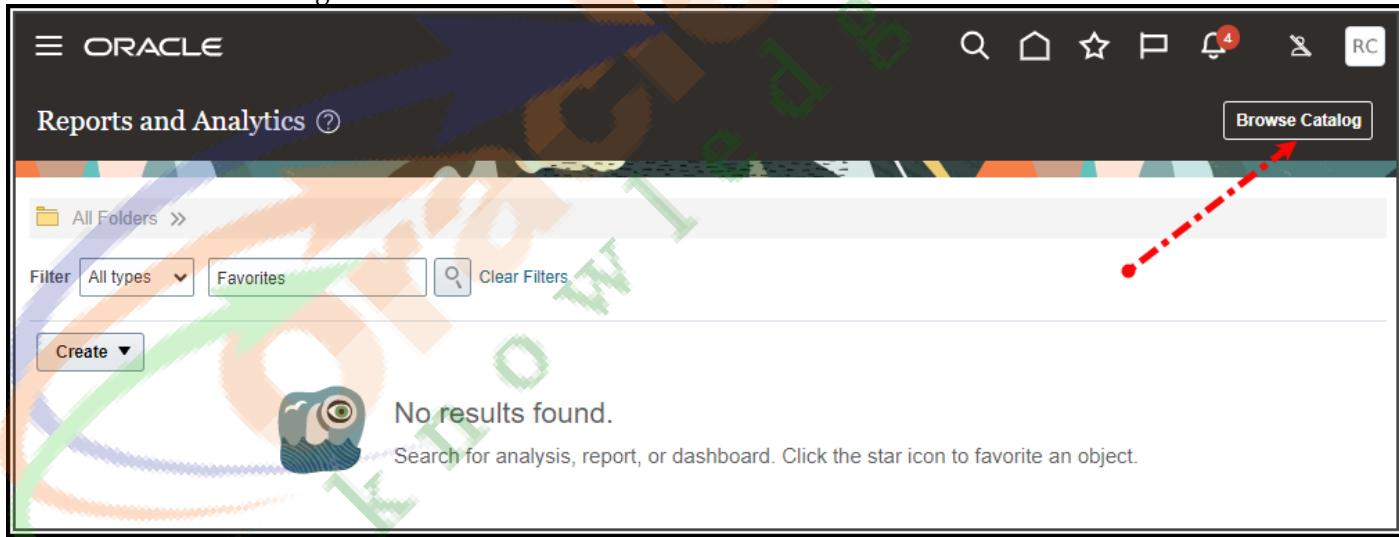
At the bottom of the page, there are links for Edit, Refresh, Print, Export, Add to Briefing Book, Email, and Copy.

#### 4 c. Applying the Filter to existing Report Column

Navigate to: Report and Analytics.



2. Click the Browse Catalog icon.



Move to the folder and click on the Edit in the report

Catalog

User View ▾

Type All Sort Name A-Z Show More Details

XXAA Supplier Detail Analysis Report | Last Modified 9/9/24 5:17 PM | Owner RAJU CHINTHAPATLA

Open Edit More

Folders

- Procurement
  - Purchasing
  - Reconciliation
  - Suppliers**
- Projects
- Public Sector
- Redwood
- RelationshipViewer

## 1. Create the Filter

Move to Criteria, Click on the Actions and click on the Filter

XXAA Supplier Detail Analysis Report

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

Criteria Results Prompts Advanced

Subject Area XYZ

Selected Columns

Supplier Profile	Supplier Site Assignment Details	Supplier Site Details
Supplier Type	Supplier Name	Supplier Number

Sort Edit formula Column Properties Filter Delete Save Column As

Filters

Select the Operator and Enter the Filter condition value

**New Filter**

Column: Supplier Type  
Operator: is equal to / is in  
Value: Supplier

OK Cancel

Save the Report

**XXAA Supplier Detail Analysis Report**

Home Catalog Favorites Dashboards Create Open

Criteria Results Prompts Advanced

Subject Area

Supplier - Supplier Real Time

- Supplier Addresses
- Supplier Contacts
- Supplier Counts
- Supplier Site Assignments
- Supplier Sites
- Supplier Spend Authorizations
- Suppliers

Table

Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Name
Supplier	49K Home supplier	1480	49K HYD BU	S2_Address	S2_Address
Supplier	ABC	123			
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare

## 2. Create the Table Level Prompt

Click on the Table Edit view

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Compound Layout

Title: XXAA Supplier Detail Analysis Report

Table:

Supplier Type	Supplier Number	Client BU	Site	Address Name	Last Update
Supplier	1213				
Supplier	121314				
Supplier	1214				

Right click on the Column and Move Column, to Prompts

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Table:

Editing from: "Compound Layout"

Supplier Type Supplier Name

Supplier 49K Home s

Supplier ABC

Supplier ABC Consult

Supplier ABC Consult

**Layout**

Sort Column

Keep Only

Remove

Add Members...

Add Custom Calculated Item...

Show Subtotal

Show Row level Grand Total

Table Prompts

Sections

Table

Selection Steps

1

2

3

To Prompts

Left Drop here for Table prompts

Right Drop here for a sectioned Table

To Sections

Table Prompt is created

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Table

**Subject Area:**

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
  - Supplier Sites
  - Supplier Spend Authorizations
  - Suppliers
    - Income Tax
    - Supplier Bank Accounts

**Catalog:**

List All

My Folders Shared Folders

**Editing from: "Compound Layout"**

**Done Revert**

**Supplier Name:** ABC Consulting

Supplier Type	Supplier Number	Client BU	Site	Address Name	Last Name
Supplier	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare	Abbott
Supplier	1288	Supremo US Business Unit	ABC Supremo US	ABC Supremo US	Abbott
Supplier	1288	Sweden Business Unit	ABC Norway	ABC Norway	Abbott
Supplier	1288	Sweden Business Unit	ABC Sweden	ABC Sweden	Abbott

**Layout:**

Drag/drop measures, columns and hierarchies to determine table layout.

**Table Prompts:**

- Supplier Profile
- Supplier Name**

**Sections:**

Verify the Report output, Here the Supplier name Column will be in the report

XXAA Supplier Detail Analysis Report

Home Catalog

**XXAA Supplier Detail Analysis Report**

**Supplier Name:** ABC Consulting

Supplier Type	Supplier Number	Client BU	Site	Address Name	Last Name
Supplier	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare	Abbott
Supplier	1288	Supremo US Business Unit	ABC Supremo US	ABC Supremo US	Abbott
Supplier	1288	Sweden Business Unit	ABC Norway	ABC Norway	Abbott
Supplier	1288	Sweden Business Unit	ABC Sweden	ABC Sweden	Abbott
Supplier	1288	US1 Business Unit	ABC US1	ABC US1	Abbott

Edit - Refresh - Print - Export - Add to Briefing Book - Email - Copy

### Create the Analysis report level Prompt

Move to Prompts, Click on the New, Column Prompt, and select the Column

XXAA Supplier Detail Analysis Report

Prompts

Prompt Label	Type	Prompt For	Description
Page 1	Page		

Add prompts for users when they run this analysis.

Column Prompt  
Variable Prompt  
Image Prompt  
Currency Prompt

Supplier Type  
Supplier Name  
Supplier Number  
Client BU  
Site  
Address Name  
Last Name  
More Columns ...

Select the Operator and click Ok

XXAA Supplier Detail Analysis Report

Prompts

Definition

Add prompts for users when they run this analysis.

Prompt Label

Page 1

Select Supplier Name

Edit Prompt: Select Supplier Name

Prompt For Column "Supplier Profile"."Supplier Name"

Label Select Supplier Name

Custom Label

Operator is equal to / is in

User Input Choice List

OK Cancel

In the below we can verify it and Save it

**XXAA Supplier Detail Analysis Report**

Home Catalog Favorites Dashboards Create Open

Criteria Results **Prompts** Advanced

**Definition**

Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				
Select Supplier Name	Column value	Supplier Name			

ABC Bank  
 ABC Consulting  
 ABCA  
 ABCAB  
 ABCC  
 ABCG

**Display**

Page 1 /   
  
Select Supplier Name

To run the report, move to Catalog and click on the Open link on report

**Catalog**

Home Catalog Favorites Dashboards Create Open

User View Location /Shared Folders/Custom/Procurement/Suppliers Show Hidden Items

**Folders**

- PRC
- Procurement
  - Purchasing
  - Reconciliation
  - Suppliers**
  - Projects

Type All Sort Name A-Z Show More Details

**XXAA Supplier Detail Analysis Report** Last Modified 9/9/24 5:25 PM Owner RAJU CHINTHAPATLA

Open Edit More

Verify the report output, Select the Supplier name form List and click ok

**XXAA Supplier Detail Analysis Report**

Select Supplier Name

OK Reset

Edit - Refresh - Copy

XXAA Supplier Detail Analysis Report

XXAA Supplier Detail Analysis Report

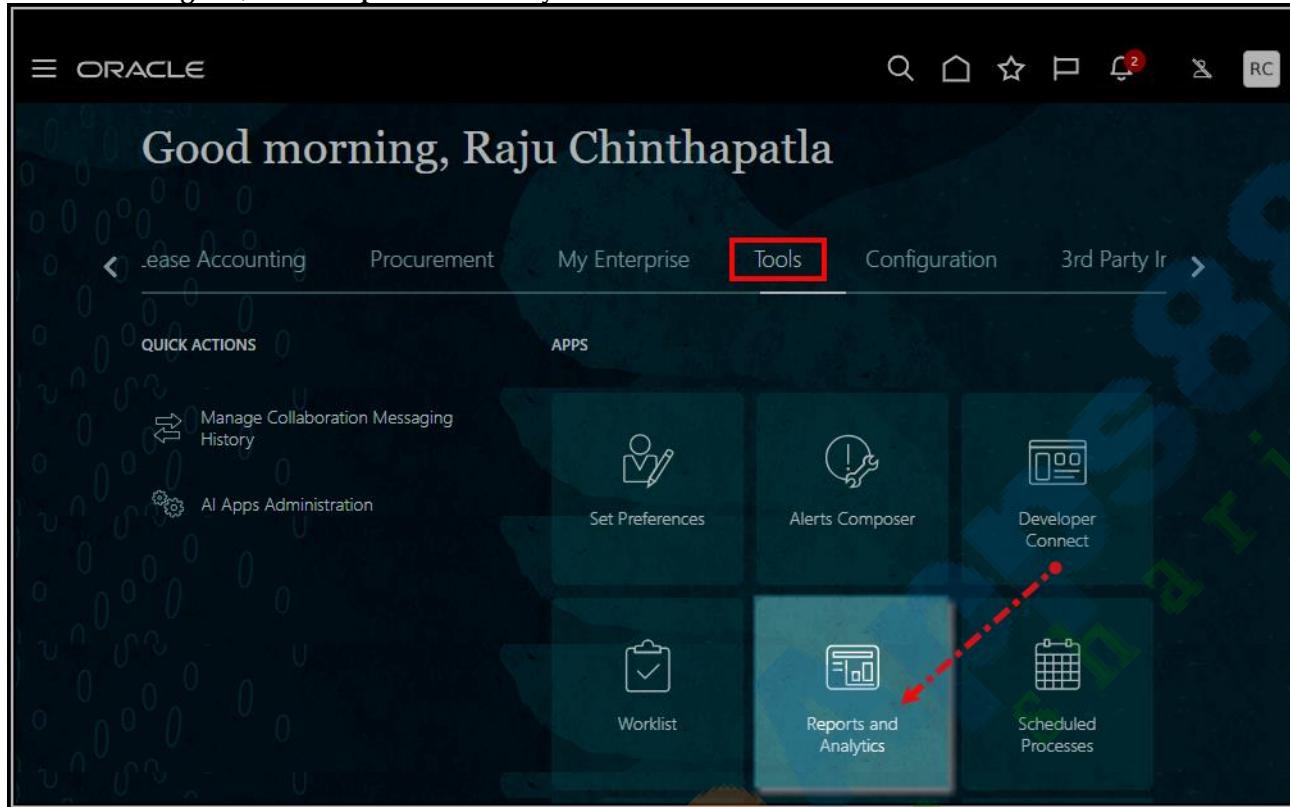
Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Name	Last
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare	Abt
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	ABC Supremo US	Abt
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Norway	ABC Norway	Abt
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Sweden	ABC Sweden	Abt
Supplier	ABC Consulting	1288	US1 Business Unit	ABC US1	ABC US1	Abt

Edit - Refresh - Print - Export - Add to Briefing Book - Email - Copy

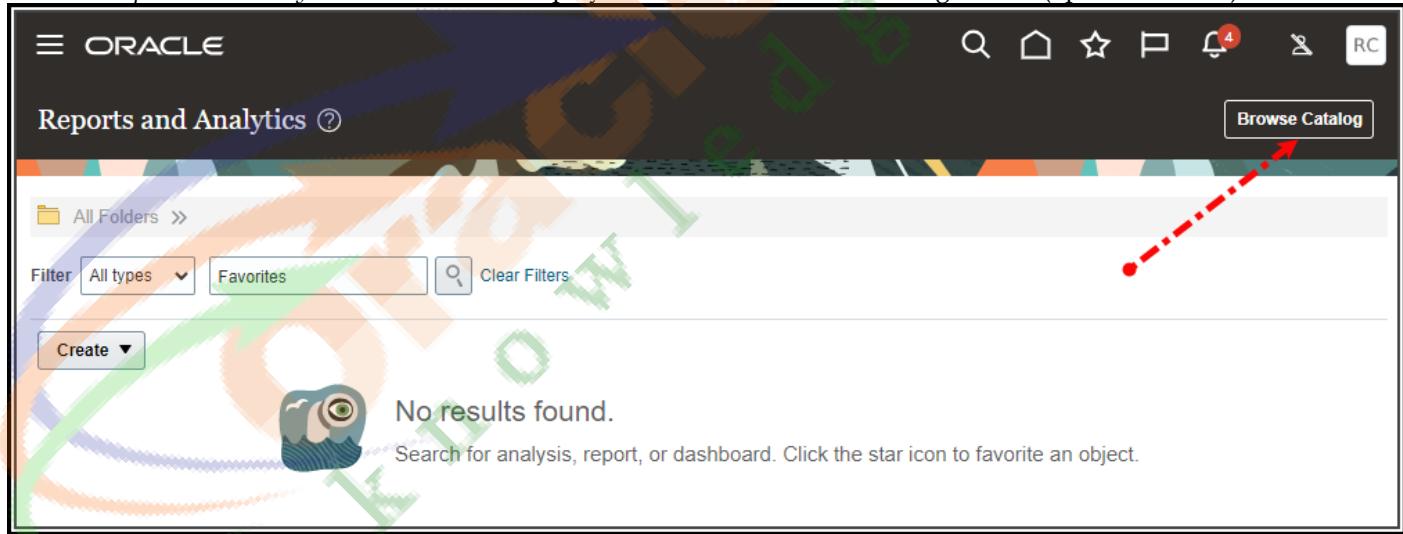


## 5. Creating BI Report (Using Data Model) for Purchase Order Details

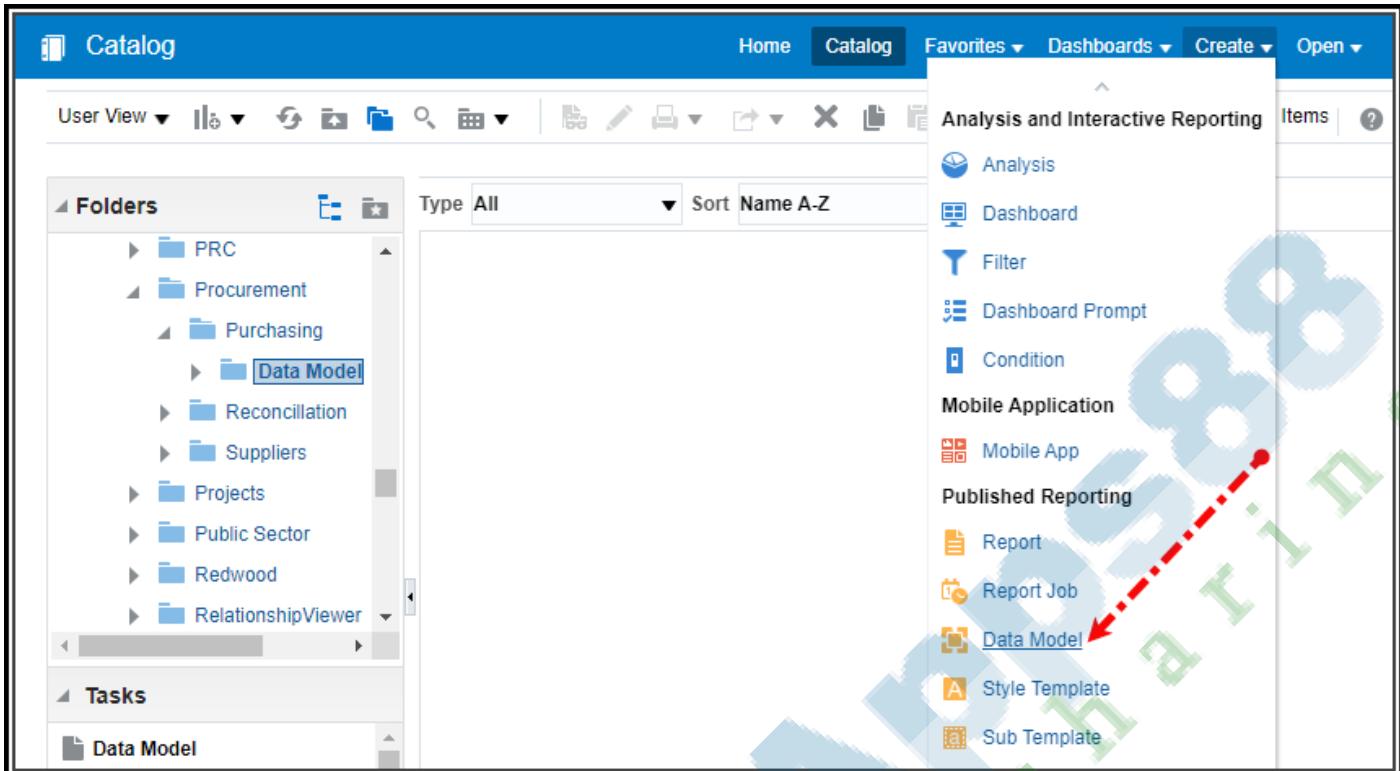
From the Navigator, select Reports and Analytics under Tools.



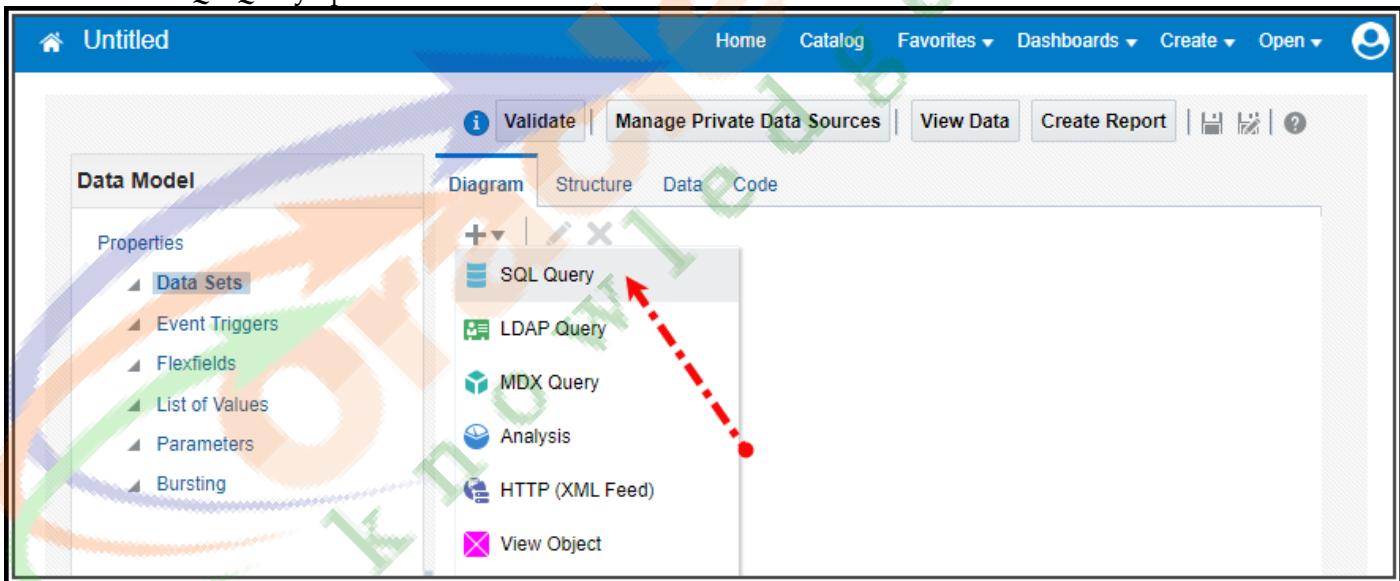
1. The *Reports and Analytics* Work Area is displayed. Click the Browse Catalog button (open book icon).



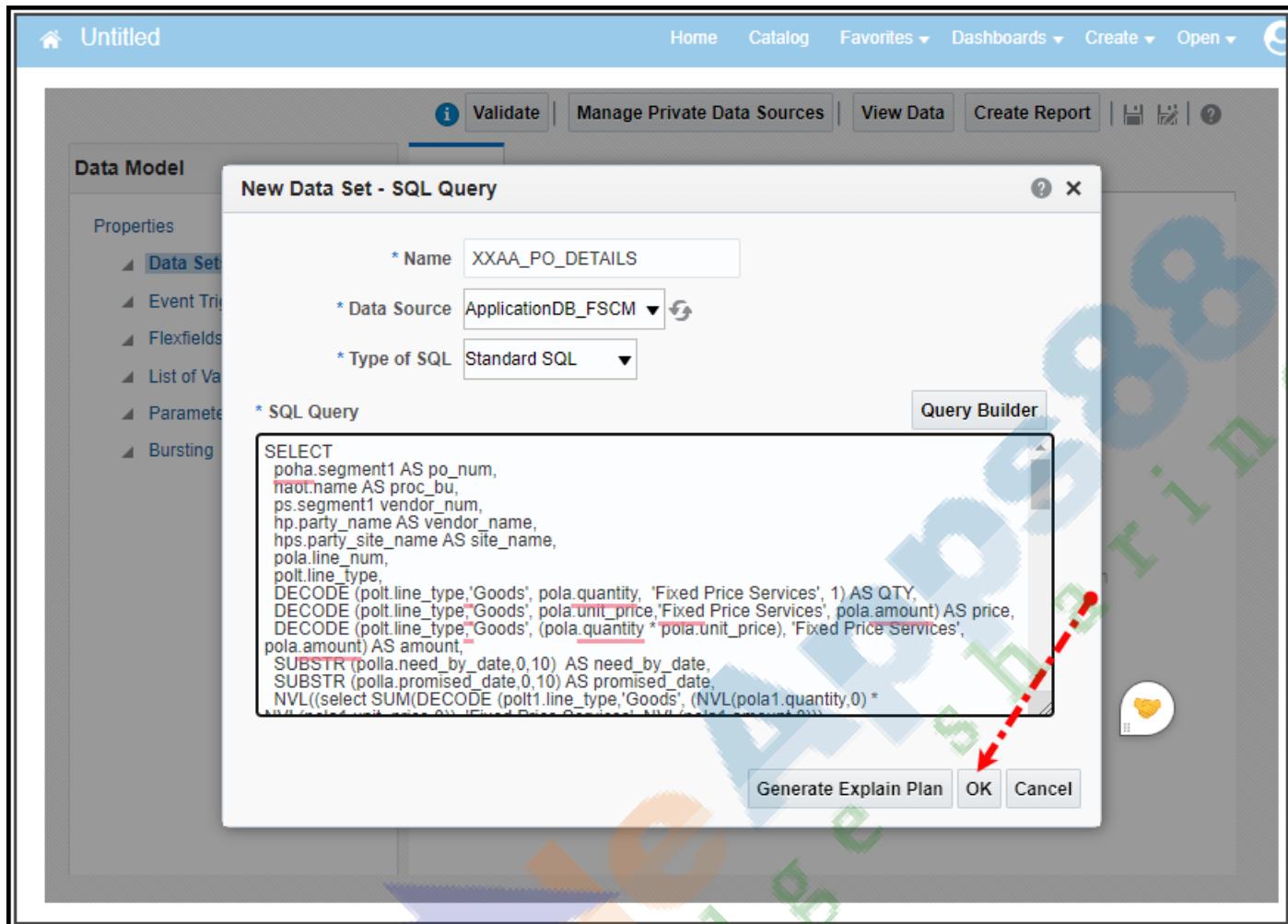
2. Expand the **Shared Folders** folder in the **Reports and Analytics** work area. Expand the **Custom** folder.
3. Select the **Data Model** folder to create the report
4. Select the Folder and click on Create (New) > **Data Model**



5. The Data Model window is displayed. Click Data Sets and click the + icon.
6. Select the SQL Query option.



7. Enter the Name, Data Source and SQL Query. Click the OK button.

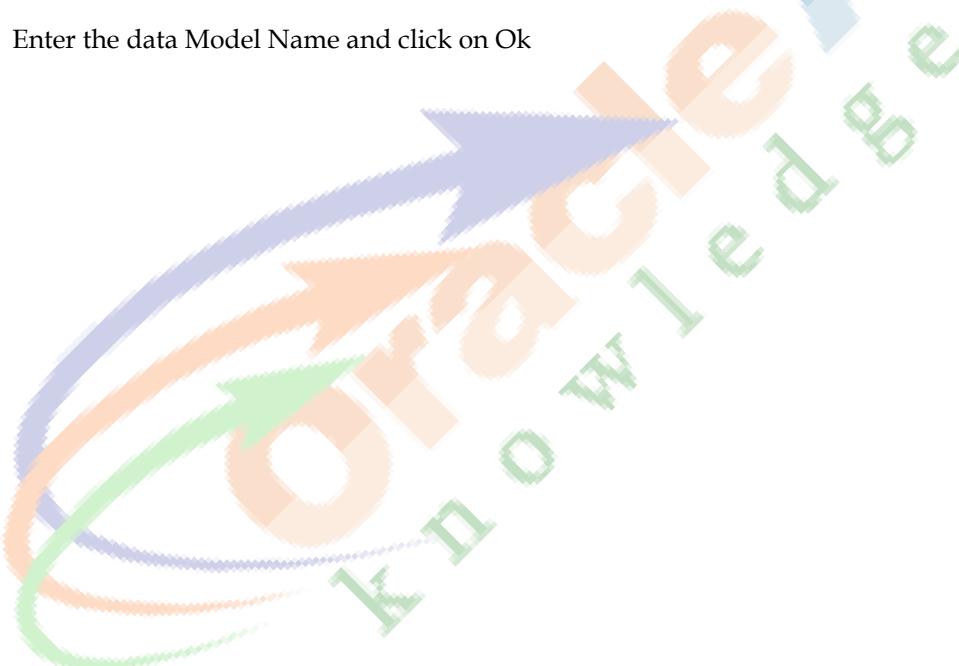


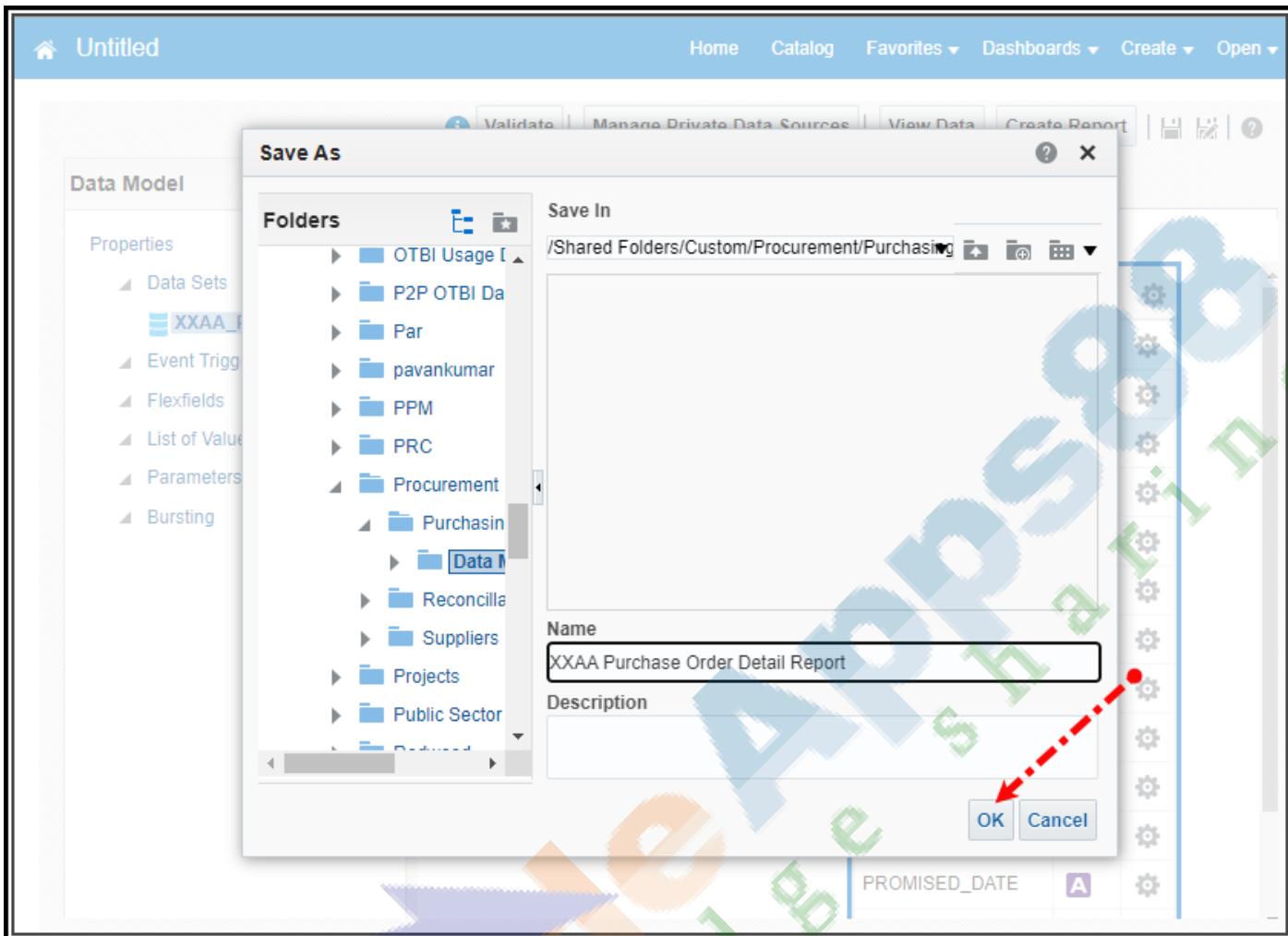
8. Click the **Save** icon. In the **Save As** window, select the location and enter a **Name**, then click the **OK** button.

The screenshot shows the Oracle Fusion OTBI Data Model Editor interface. On the left, there's a sidebar titled "Data Model" with sections for Properties, Data Sets (including XXAA\_PO\_DETAILS), Event Triggers, Flexfields, List of Values, Parameters, and Bursting. The main workspace has tabs for Diagram, Structure, Data, and Code, with the Diagram tab selected. A "Global Level Functions" panel is open, showing a placeholder "Drop here for aggregate function". To the right, a table named "G\_PO" is displayed with the following columns and their data types:

	G_PO
PO_NUM	A
PROC_BU	A
VENDOR_NUM	A
VENDOR_NAME	A
SITE_NAME	A
LINE_NUM	#E▼
LINE_TYPE	A
QTY	#E▼
PRICE	#E▼
AMOUNT	#E▼

Enter the data Model Name and click on Ok





9. In the Data Model window, select the Data tab and click View.

XXAA Purchase Order Detail Report

Data Model

Properties

- Data Sets [XXAA\\_PO\\_DETAILS](#)
- Event Triggers
- Flexfields
- List of Values
- Parameters
- Bursting

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

Validate Manage Private Data Sources View Data Create Report

Diagram Structure Data Mode

Rows 5 ▾ View Export Save As Sample Data View Engine Log Generate

Tree View | [Table View](#)

PO_NUM	PROC_BU	VENDOR_NUM	VENDOR_NAME	SITE_NAME	LINE_NUM	LINE_TYPE	QTY	PRICING_TYPE	PRICE
162026	US1 Business Unit	1254	JGA	JGA US1	1	Goods	1	279	
162027	US1 Business Unit	1252	Lee Supplies	Lee US1	1	Goods	1	149	
162028	US1 Business Unit	1252	Lee Supplies	Lee US1	1	Goods	14	189	
162029	US1 Business Unit	1255	Dell Inc.	Dell US1	1	Goods	1	1219	
162030	US1 Business Unit	1254	JGA	JGA US1	1	Fixed Price Services	1	200	

10. Click the **Save as Sample Data** button to save the output as sample data.

XXAA Purchase Order Detail Report

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

Data Model

Properties

- Data Sets
- XXAA\_PO\_DETAILS
- Event Triggers
- Flexfields
- List of Values
- Parameters
- Bursting

Validate | Manage Private Data Sources | View Data | Create Report | **Save As Sample Data** | View Engine Log | Generate

Rows 5 ▾ View Export | Tree View | Table View

An Image Oracle BI Publisher Date: Sep 9, 2024 6:42:54 PM Page 1 Of 1

PO_NUM	PROC_BU	VENDOR_NUM	VENDOR_NAME	SITE_NAME	LINE_NUM	LINE_TYPE	QTY	PRICE
162026	US1 Business Unit	1254	JGA	JGA US1	1	Goods	1	279
162027	US1 Business Unit	1252	Lee Supplies	Lee US1	1	Goods	1	149
162028	US1 Business Unit	1252	Lee Supplies	Lee US1	1	Goods	14	189
162029	US1 Business Unit	1255	Dell Inc.	Dell US1	1	Goods	1	121
162030	US1 Business Unit	1254	JGA	JGA US1	1	Fixed Price Services	1	200



The screenshot shows the Oracle BI Publisher interface for a 'XXAA Purchase Order Detail Report'. The left sidebar lists the 'Data Model' properties, including 'Data Sets' (XXAA\_PO\_DETAILS selected), 'Event Triggers', 'Flexfields', 'List of Values', 'Parameters', and 'Bursting'. The main area displays a table of purchase order details. A modal dialog box titled 'Info' appears, stating 'Saved as Sample Data' with an 'OK' button. The table data includes:

PO_NUM	PROC_BU	Line Type	QTY	PRI
162026	US1 Business Unit	Goods	1	279
162027	US1 Business Unit	Goods	1	149
162028	US1 Business Unit	Goods	14	189
162029	US1 Business Unit	Dell Inc.	Dell US1	1
162030	US1 Business Unit	JGA	JGA US1	1
				Fixed Price Services
				1 200

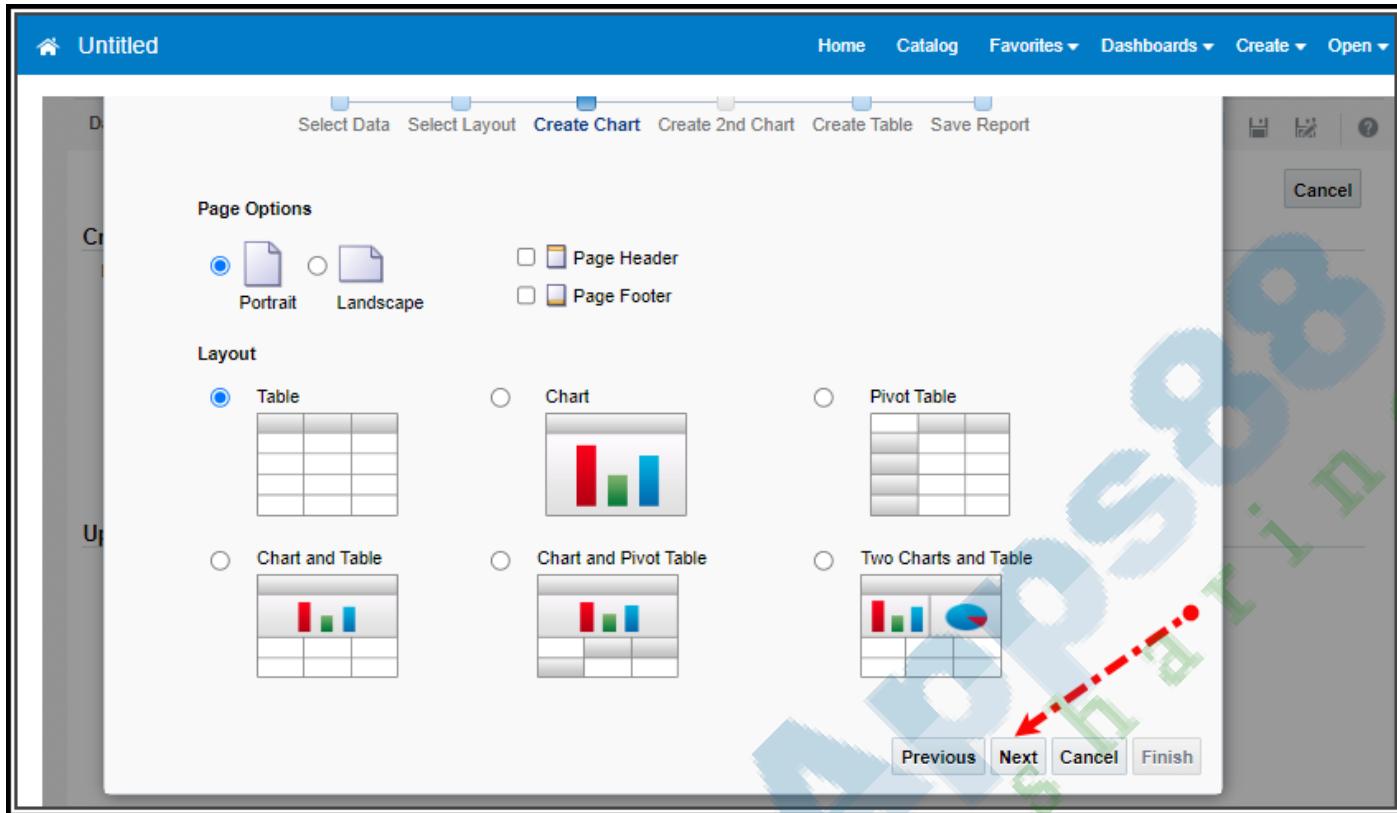
11. Click the **Create Report** button.

The screenshot shows the Oracle BI Publisher interface. On the left, under the 'Data Model' section, there is a tree view with nodes like Properties, Data Sets (selected), Event Triggers, Flexfields, List of Values, Parameters, and Bursting. Under 'Data Sets', the node 'XXAA\_PO\_DETAILS' is selected. At the top right, there are several buttons: Validate, Manage Private Data Sources, View Data, Create Report (which has a red arrow pointing to it), and others. Below the buttons is a toolbar with Row Selection (Rows 5), View, Export, Save As Sample Data, View Engine Log, and Generate. The main area displays a table titled 'XXAA Purchase Order Detail Report' with columns: PO\_NUM, PROC\_BU, VENDOR\_NUM, VENDOR\_NAME, SITE\_NAME, LINE\_NUM, LINE\_TYPE, QTY, PR. The table contains five rows of data. A watermark 'EduGATE' is visible across the interface.

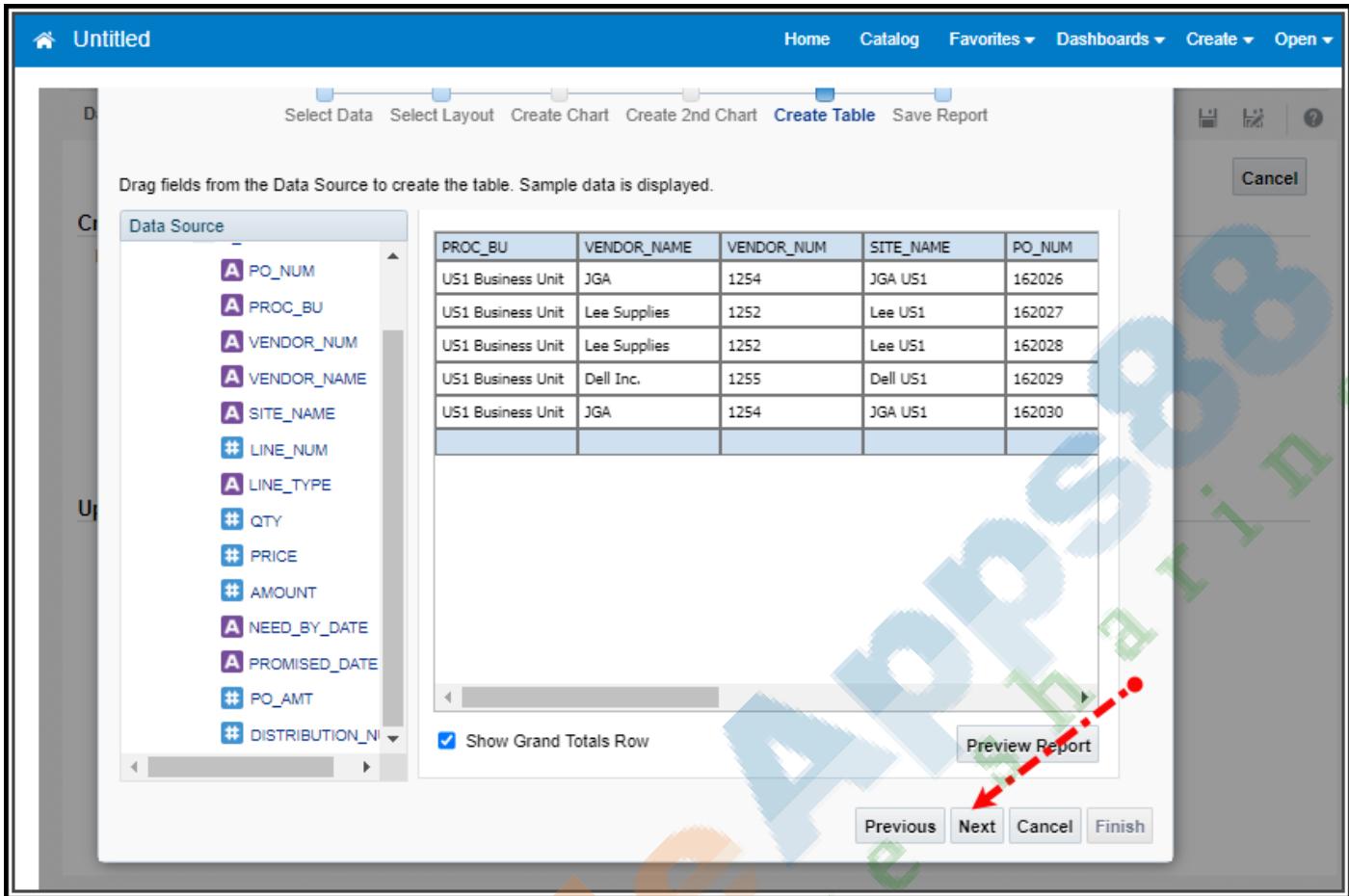
12. Select the **Data Model** and click the **Next** button.

The screenshot shows the 'Create a report using an existing Data Model' wizard step. It features a navigation bar at the top with buttons: Home, Catalog, Favorites, Dashboards, Create, and Open. Below the bar, there are several options: Select Data, Select Layout, Create Chart, Create 2nd Chart, Create Table, and Save Report. In the center, there are three buttons: 'Use Data Model' (highlighted with a red box), 'Upload Spreadsheet', and 'Use Subject Area'. Below these buttons is a text input field labeled 'Data Model' containing 'XXAA Purchase Order Detail Report.' A search icon is next to the input field. At the bottom, there is a question 'How do you want to create your report?' with two radio button options: 'Guide Me' (selected) and 'Use Report Editor'. At the very bottom are four buttons: Previous, Next (highlighted with a red arrow), Cancel, and Finish.

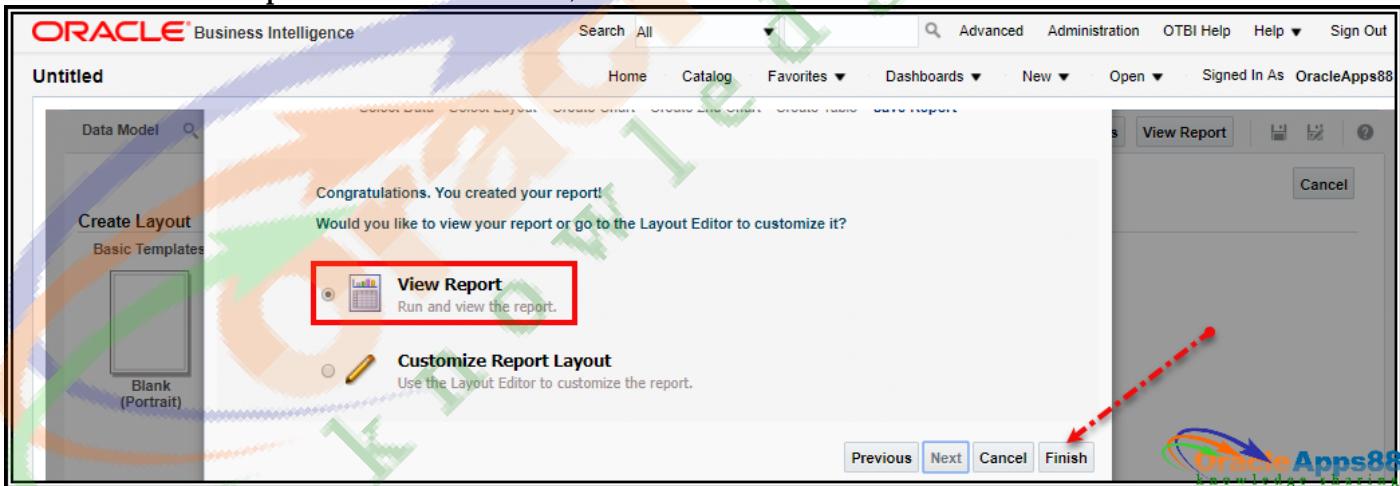
13. Click **Next**



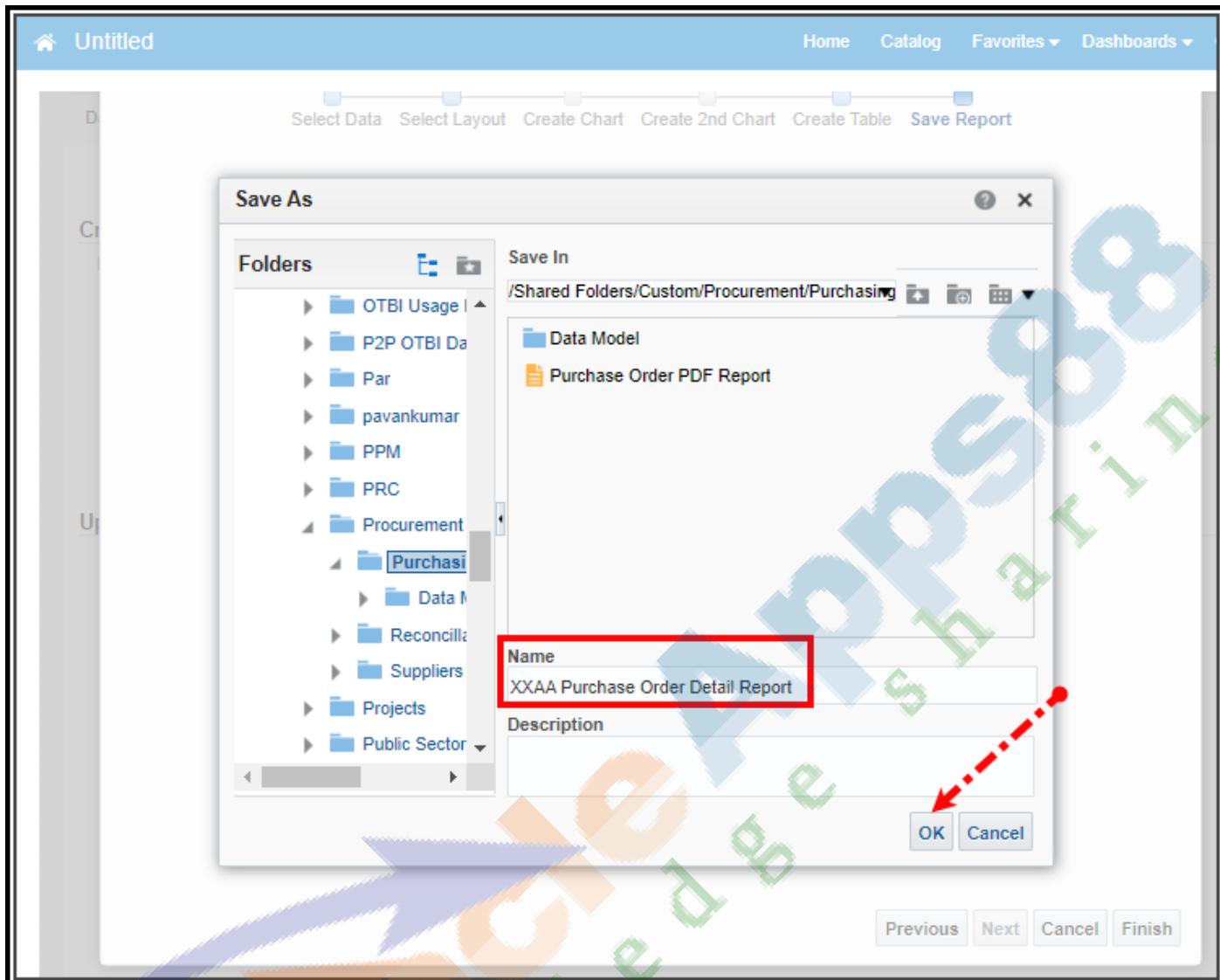
14. Select the desired columns in the output, then click the **Next** button.



15. With the **View Report** radio button selected, click the **Next** button.



16. Save the report. Enter a Name and click the **OK** button.



17. The output is displayed as shown below.

The screenshot shows a report titled "XXAA Purchase Order Detail Report". The table has columns: Proc BU, Supp Name, Supp Num, Site Name, PO Num, PO Amount, Line Num, Need By Date, Dist Num, QTY, and Line Am. The data includes rows for various business units like US1 Business Unit, Lee Supplies, Dell Inc., and JGA.

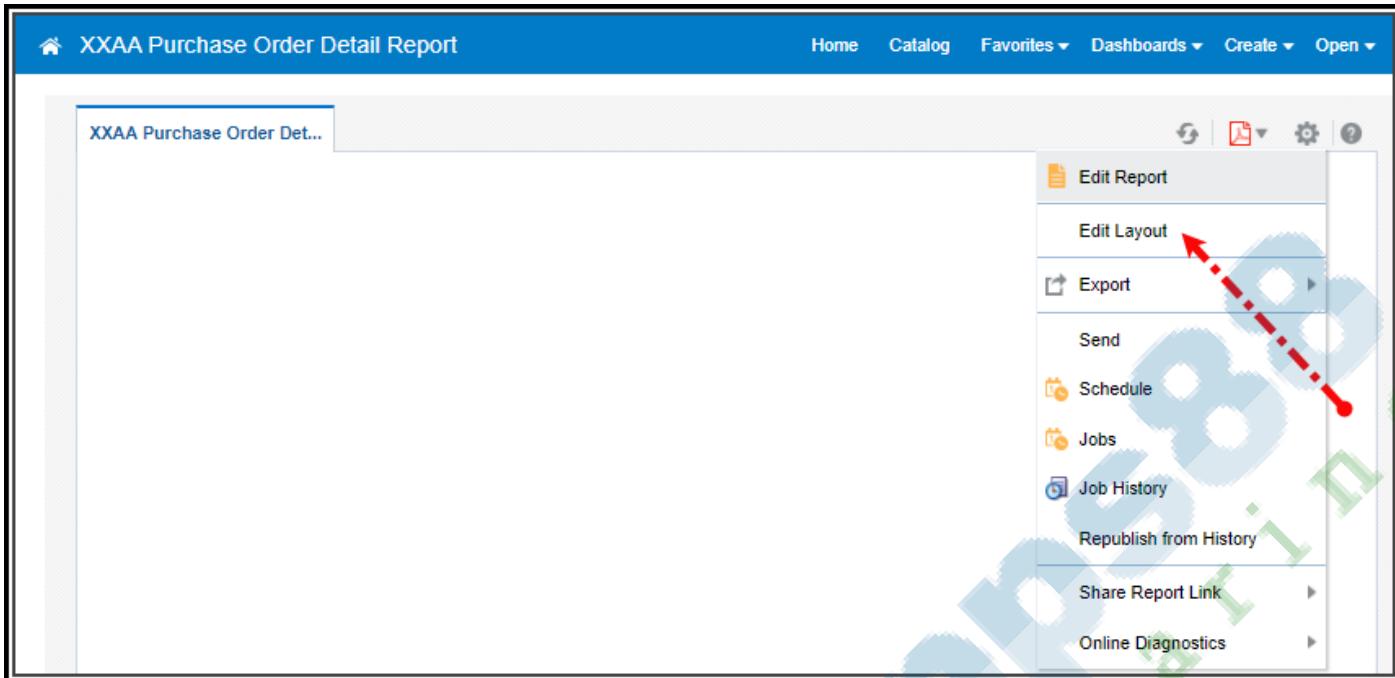
Proc BU	Supp Name	Supp Num	Site Name	PO Num	PO Amount	Line Num	Need By Date	Dist Num	QTY	Line Am
US1 Business Unit	JGA	1254	JGA US1	162026	2232	1	2013-12-18	1	1	1
US1 Business Unit	Lee Supplies	1252	Lee US1	162027	1192	1	2013-12-18	1	1	1
US1 Business Unit	Lee Supplies	1252	Lee US1	162028	21168	1		1	14	2
US1 Business Unit	Dell Inc.	1255	Dell US1	162029	9754.24	1	2013-12-18	1	1	1219
US1 Business Unit	JGA	1254	JGA US1	162030	1600	1	2013-12-19	1	1	1

#### 18. Export the output in different formats

The screenshot shows the same report interface with a context menu open. The "Export" option is highlighted with a red arrow and circled with a red number 2. Other options in the menu include Edit Report, Edit Layout, Interactive, PDF, HTML, RTF, Excel (\*.xlsx), PowerPoint (\*.pptx), Send, Schedule, Jobs, Job History, Republish from History, Share Report Link, and Online Diagnostics.

#### Formatting the Report and Column Names

Click on the Actions and Edit Layout



Double click on the column name to format and click on Save

The screenshot shows the Oracle Fusion OTBI interface with the title "XXAA Purchase Order Detail Report : XXAA Purchas...". The left sidebar shows the Data Source structure under "DATA\_DS" and "G\_PO". The main area displays a report titled "XXAA Purchase Order Detail Report" with a table containing three rows of data. The table has columns: Proc BU, Supp Name, Supp Num, Site Name, PO Num, PO Amount, Line Num, Need By Date, Dist Num, and QTY. A column header editor is open over the first column, showing font settings (Tahoma, 8pt) and alignment options. A red dashed arrow points from the "Table Column Header" button in the toolbar to the "Font" dropdown in the editor.

Proc BU	Supp Name	Supp Num	Site Name	PO Num	PO Amount	Line Num	Need By Date	Dist Num	QTY
US1 Business Unit	JGA	1254	JGA US1	162026	2232	1	2013-12-18	1	1
US1 Business Unit	Lee Supplies	1252	Lee US1	162027	1192	1	2013-12-18	1	1
US1 Business Unit	Lee Supplies	1252	Lee US1	162028	21168	1		1	14

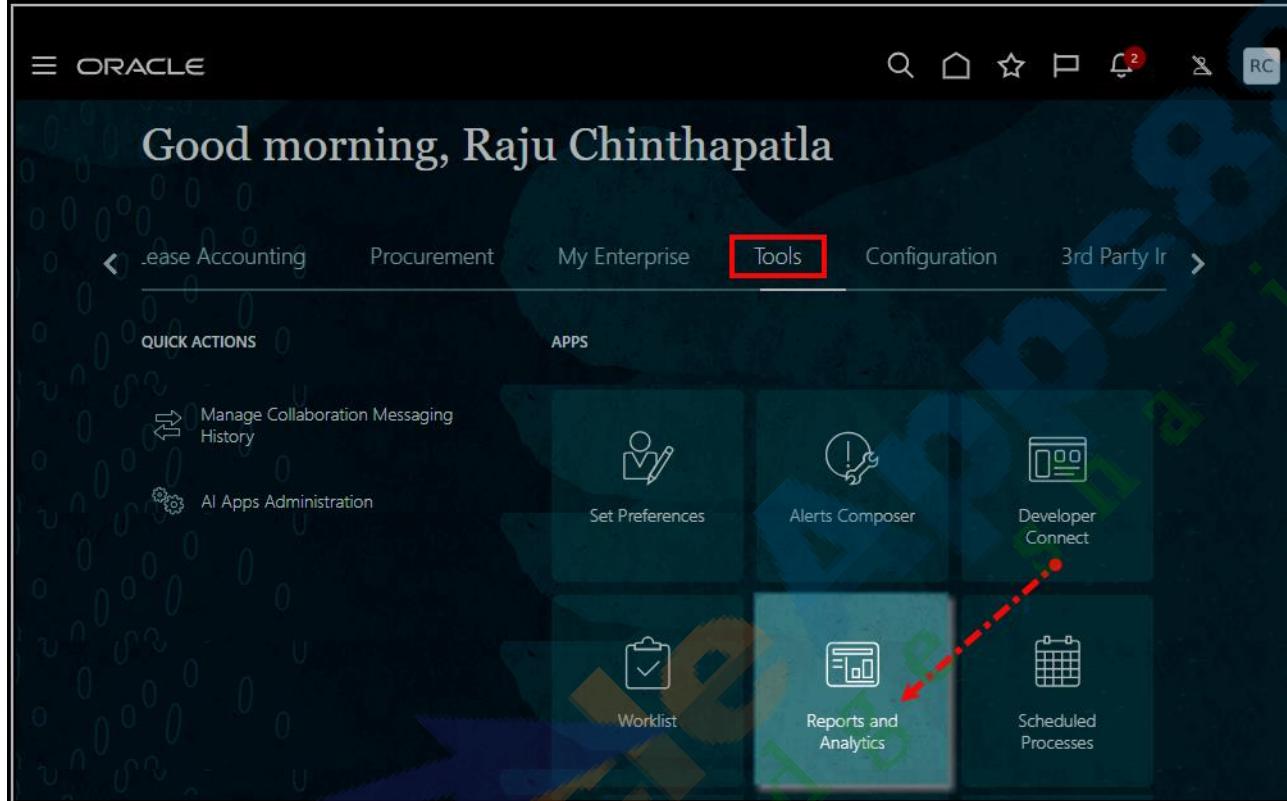
Proc BU	Supp Name	Supp Num	Site Name	PO Num	PO Amount	Line Num	Need By Date	Dist Num	QTY	Line Amt
US1 Business Unit	JGA	1254	JGA US1	162026	2232	1	2013-12-18	1	1	2
US1 Business Unit	Lee Supplies	1252	Lee US1	162027	1192	1	2013-12-18	1	1	1
US1 Business Unit	Lee Supplies	1252	Lee US1	162028	21168	1		1	14	26
US1 Business Unit	Dell Inc.	1255	Dell US1	162029	9754.24	1	2013-12-18	1	1	1219
US1 Business Unit	JGA	1254	JGA US1	162030	1600	1	2013-12-19	1	1	20

## 6. Creating Ad Hoc Reports for Expenses

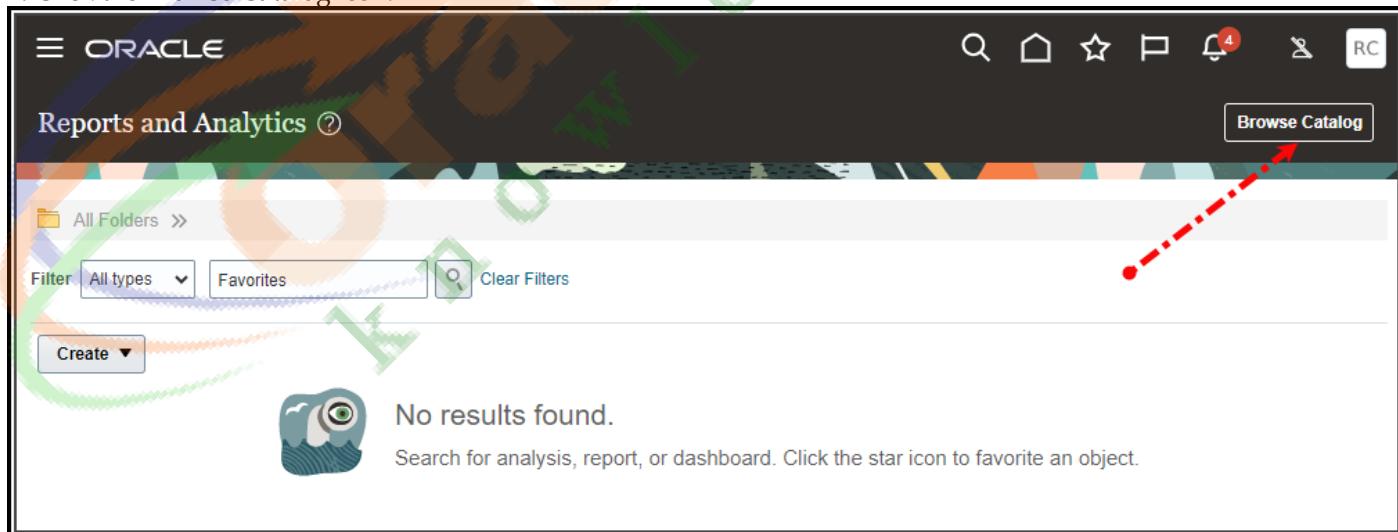
Reviewing expenses at the end of the quarter for the US1 Business Unit to compare the quarterly expense by expense categories with the previous quarters.

Create an ad hoc report that you can use going forward that compares an organization's expense with previous quarters.

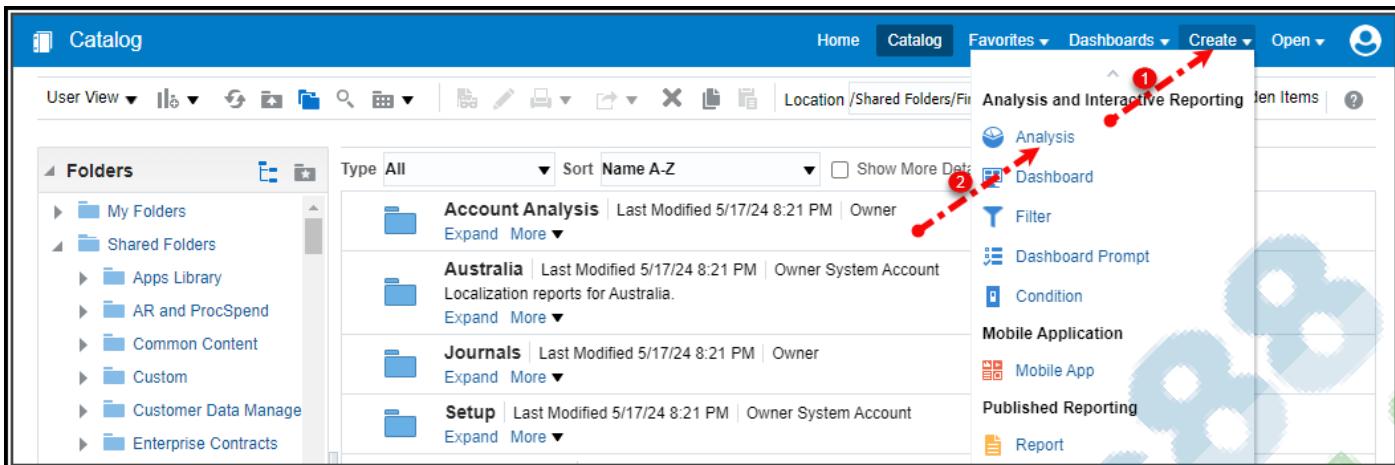
1. Navigate to: Report and Analytics.



2. Click the Browse Catalog icon.

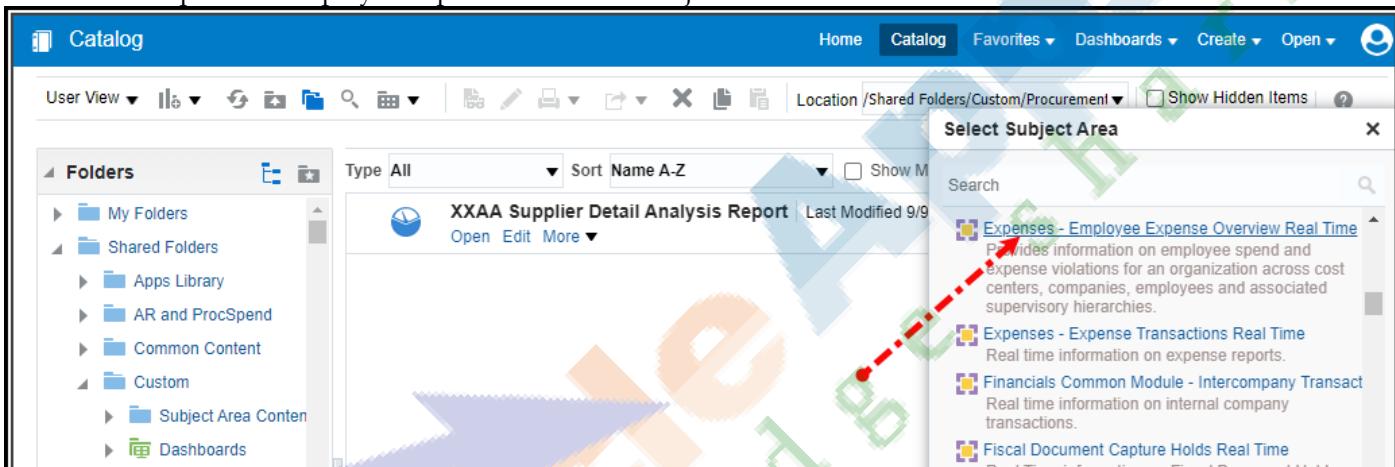


3. Click Create (New).
4. Select the Analysis option from the menu on the top-left of the page.



## Creating the Report

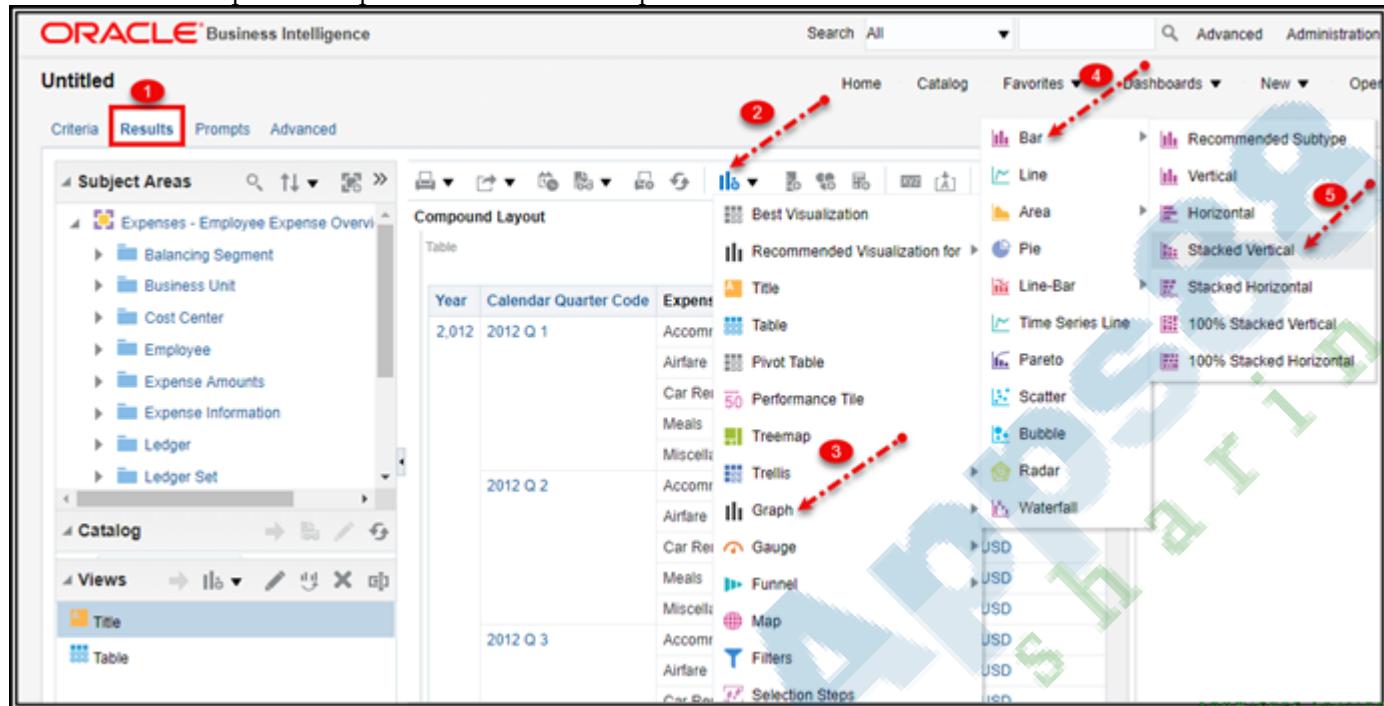
5. Select the Expenses - Employee Expense Real Time subject area.



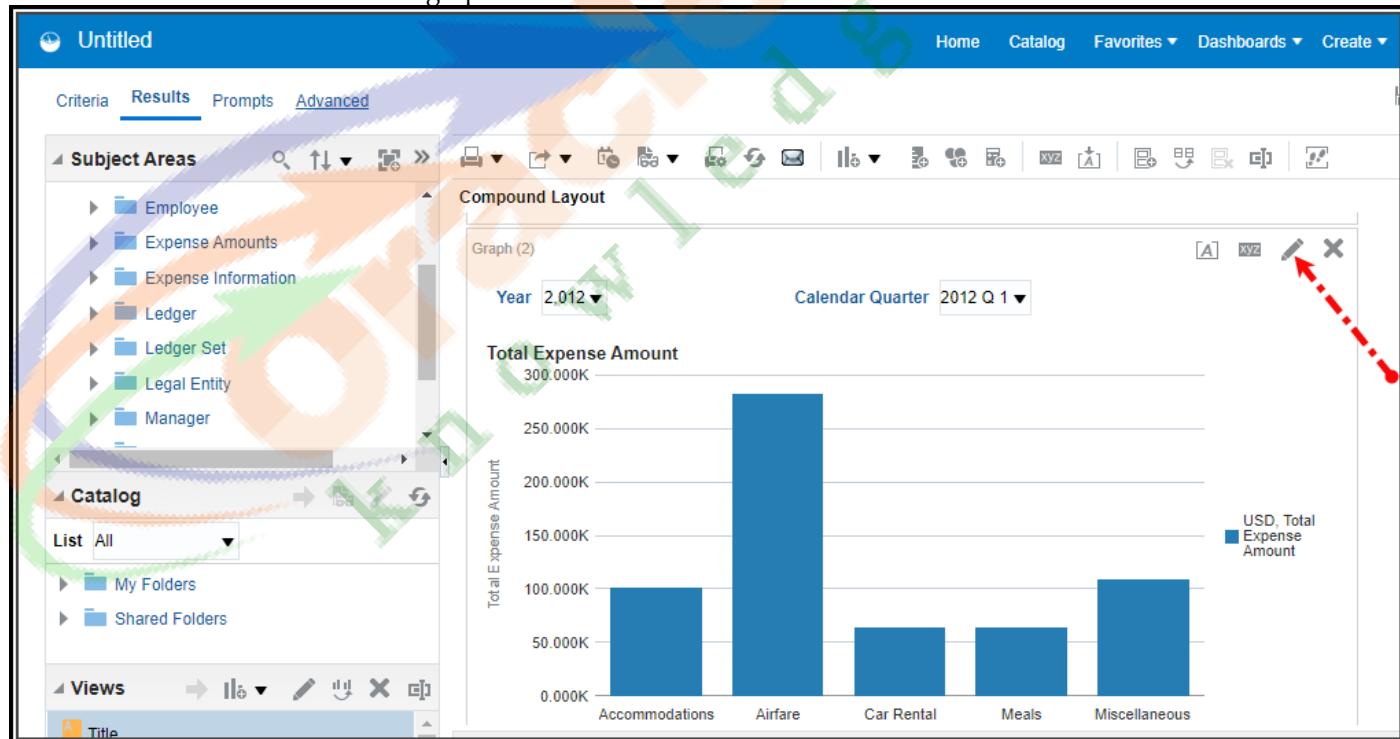
6. Expand the Time folder and double-click in the Year and Calendar Quarter Code.
7. Expand the Expense Information folder and double-click Expense Category.
8. Expand the Expense Amounts folder, and then expand the Employee Expense Amounts sub-folder.
9. Double-click Total Expense Amount and Ledger Currency.

The screenshot shows the Oracle Fusion OTBI Criteria builder interface. It includes sections for Criteria, Results, Prompts, and Advanced. The Subject Areas section lists various expense-related categories. The Selected Columns section contains a table with columns: Time, Expense Information, and Employee Expense Amounts. Under 'Employee Expense Amounts', there are sub-options: Year, Calendar Quarter, Expense Category, Total Expense Amount, and Ledger Currency. The 'Selected Columns' and 'Employee Expense Amounts' sections are highlighted with a red border.

10. Click the Results tab.
11. Click the New View icon.
12. Choose the Graph menu option > Bar sub-menu option > Stacked Vertical.



13. Scroll down the page to locate the Graph section.
14. Click the Edit View icon for the graph.



15. Drag-and-drop the columns as follows:

- Year in Sections (Display as Slider: Checked)
- Calendar Quarter Code under Bars Group by section
- Expense Category in Vary Color By section

16. Select 3D from the drop-down menu and click Done.

17. In the Compound Layout page, the order of the sections is Title, Table, and Graph.

The screenshot shows the Oracle Business Intelligence interface with a 'Compound Layout' window. On the left, there's a 'Subject Areas' tree view under 'Expenses - Employee Expense Overview' with nodes like 'Balancing Segment', 'Business Unit', 'Cost Center', 'Employee', 'Expense Amounts', 'Expense Information', and 'Ledger'. The main area displays a table with columns: Year, Calendar Quarter Code, Expense Category, Total Expense Amount, and Ledger Currency. Two rows are visible: one for 'Accommodations' with a value of 101,376 USD, and another for 'Airfare' with a value of 282,621 USD. A red dashed arrow points from the text above to the 'X' icon in the top right corner of the table's container.

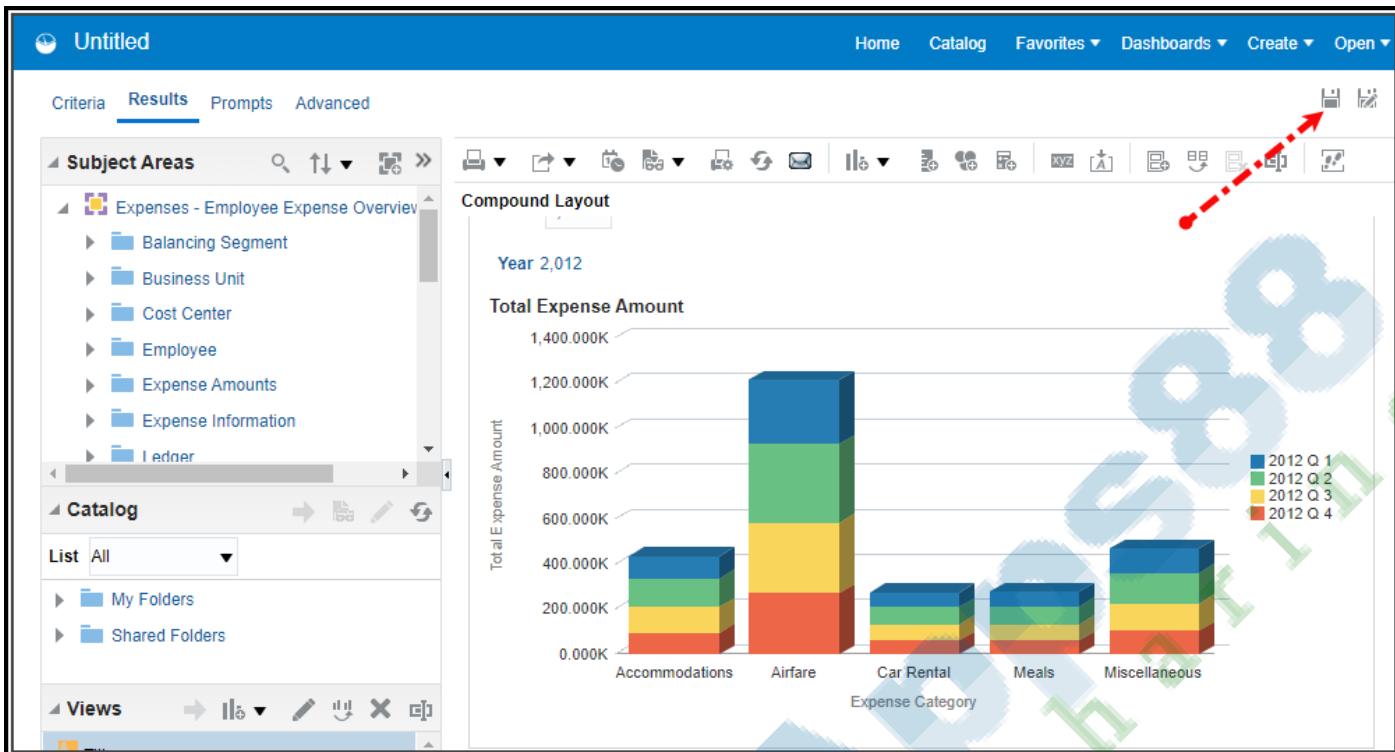
Year	Calendar Quarter Code	Expense Category	Total Expense Amount	Ledger Currency
2,012	2012 Q 1	Accommodations	101,376	USD
		Airfare	282,621	USD

**Remove the table section by clicking the X icon in the table region.**

18. The Total Expense Amount graph is displayed.

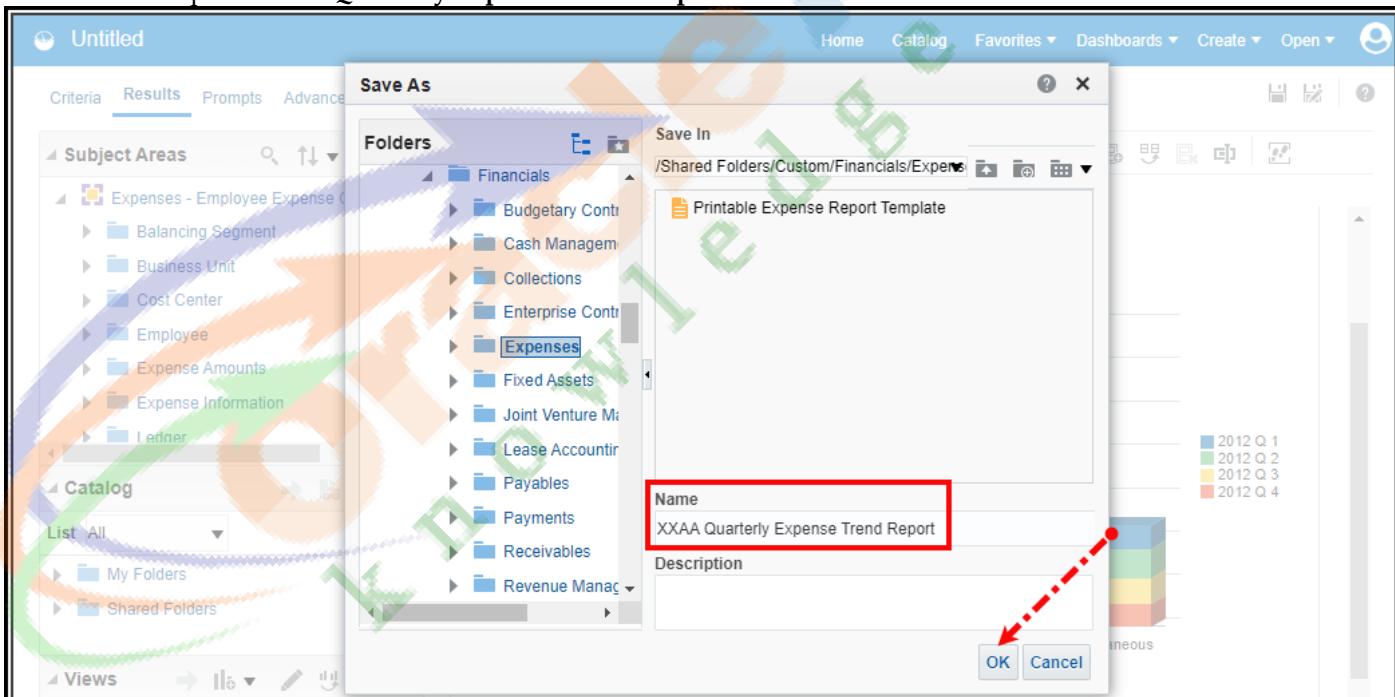
The screenshot shows the Oracle Business Intelligence interface with a 'Compound Layout' window. The left sidebar includes 'Criteria', 'Results' (selected), 'Prompts', and 'Advanced' tabs; 'Subject Areas' (with the same tree structure as the previous screenshot); 'Catalog' (with 'List' set to 'All'); and 'Views' (with 'Views' tab selected). The main area displays a 3D stacked bar chart titled 'Total Expense Amount' for the year 2012. The Y-axis represents 'Total Expense Amount' from 0.000K to 1,400.000K. The X-axis represents 'Expense Category' with five categories: Accommodations, Airfare, Car Rental, Meals, and Miscellaneous. Each category has a bar divided into four segments representing the quarters: 2012 Q 1 (blue), 2012 Q 2 (green), 2012 Q 3 (yellow), and 2012 Q 4 (red).

19. Click the Save As icon to save the report in My Folder.



20. Create a new folder called Expenses.

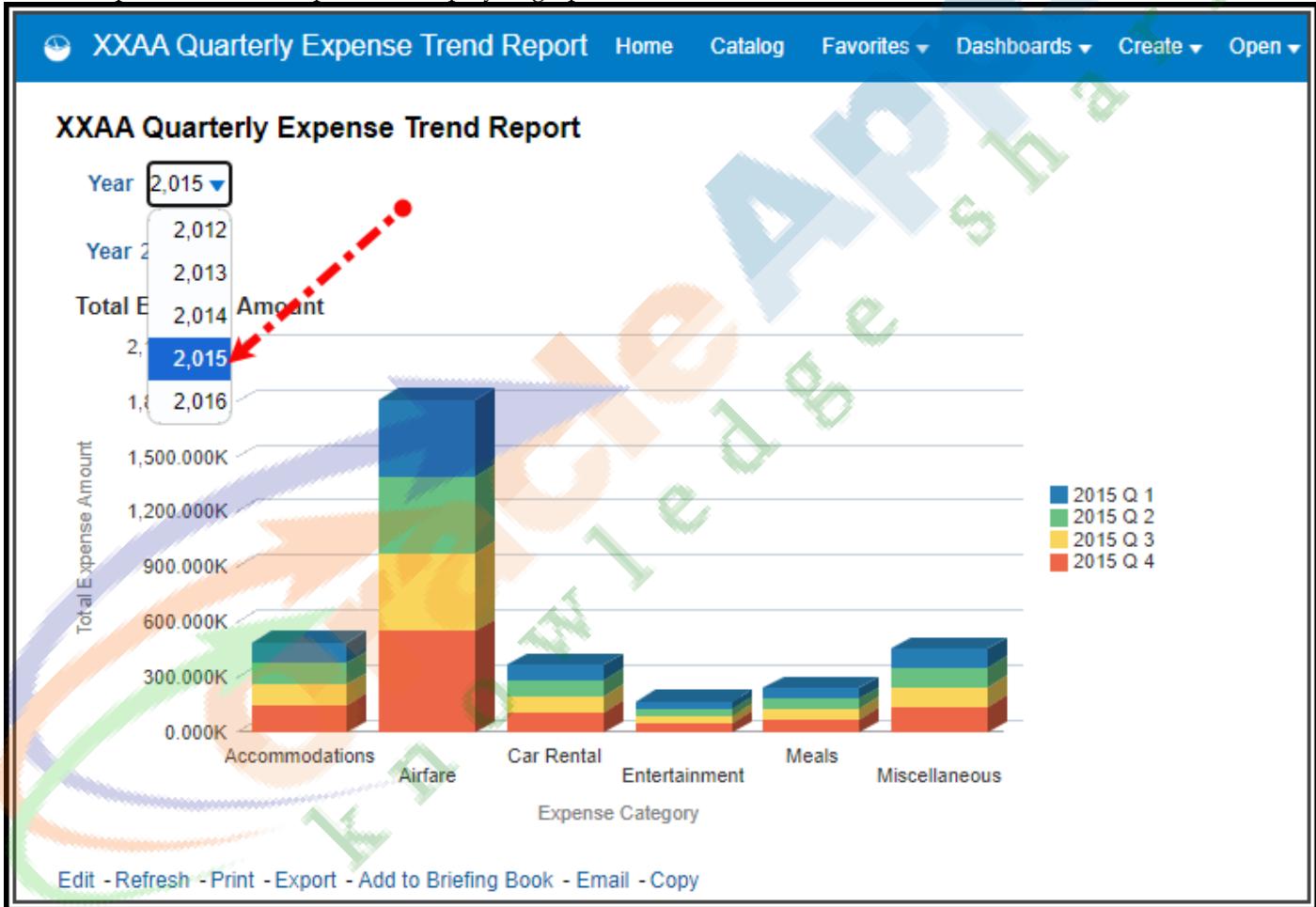
21. Name the report **XXAA Quarterly Expense Trend Report**.



To run the report go to folder and click on the Open

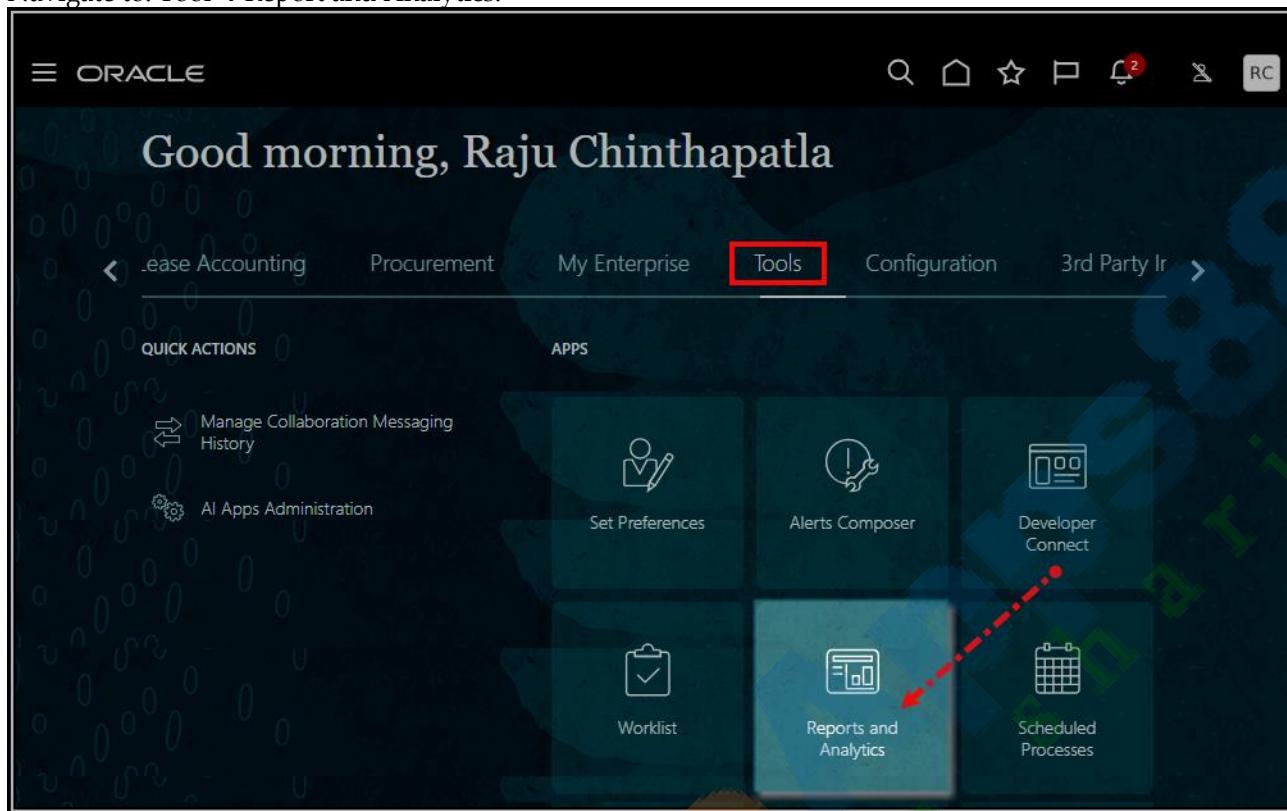
The screenshot shows the Oracle Fusion Catalog interface. On the left, there's a sidebar with 'Folders' expanded, showing categories like My Folders, Shared Folders, Apps Library, AR and ProcSpend, Common Content, Custom, Subject Area Content, Dashboards, and Apps Library. The main area displays two reports: 'Printable Expense Report Template' and 'XXAA Quarterly Expense Trend Report'. A red arrow points from the 'More' dropdown menu of the second report towards the parameter selection in the next screenshot.

Select the parameter then report will display in graphs

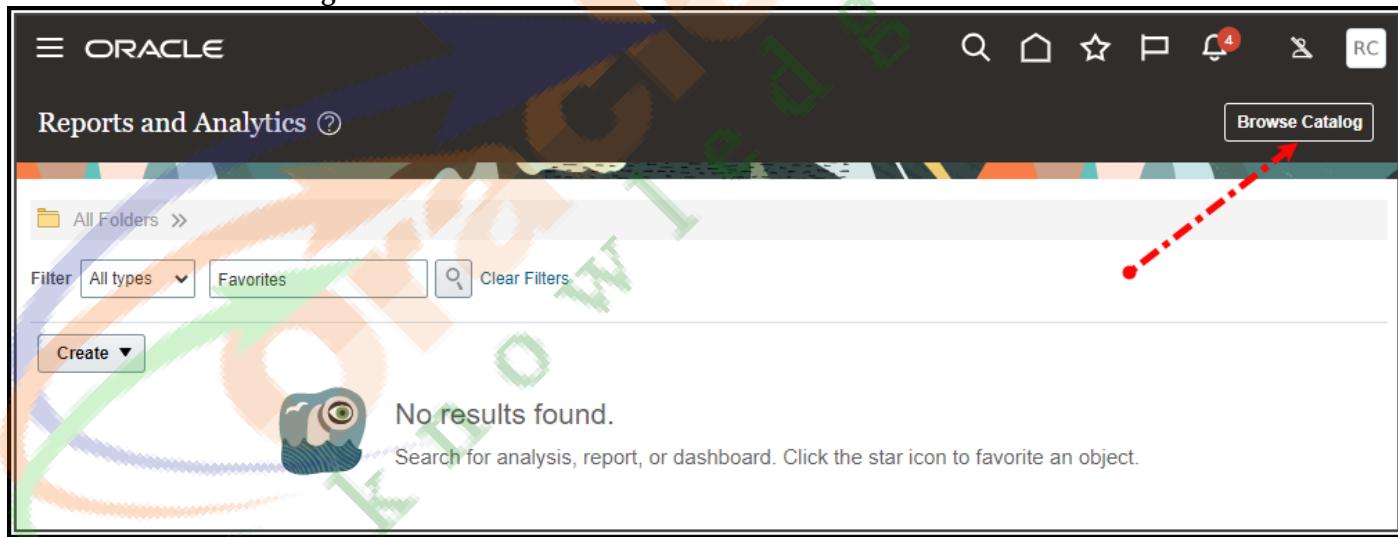


## 7. Creating Dashboard Report

Navigate to: Tool → Report and Analytics.

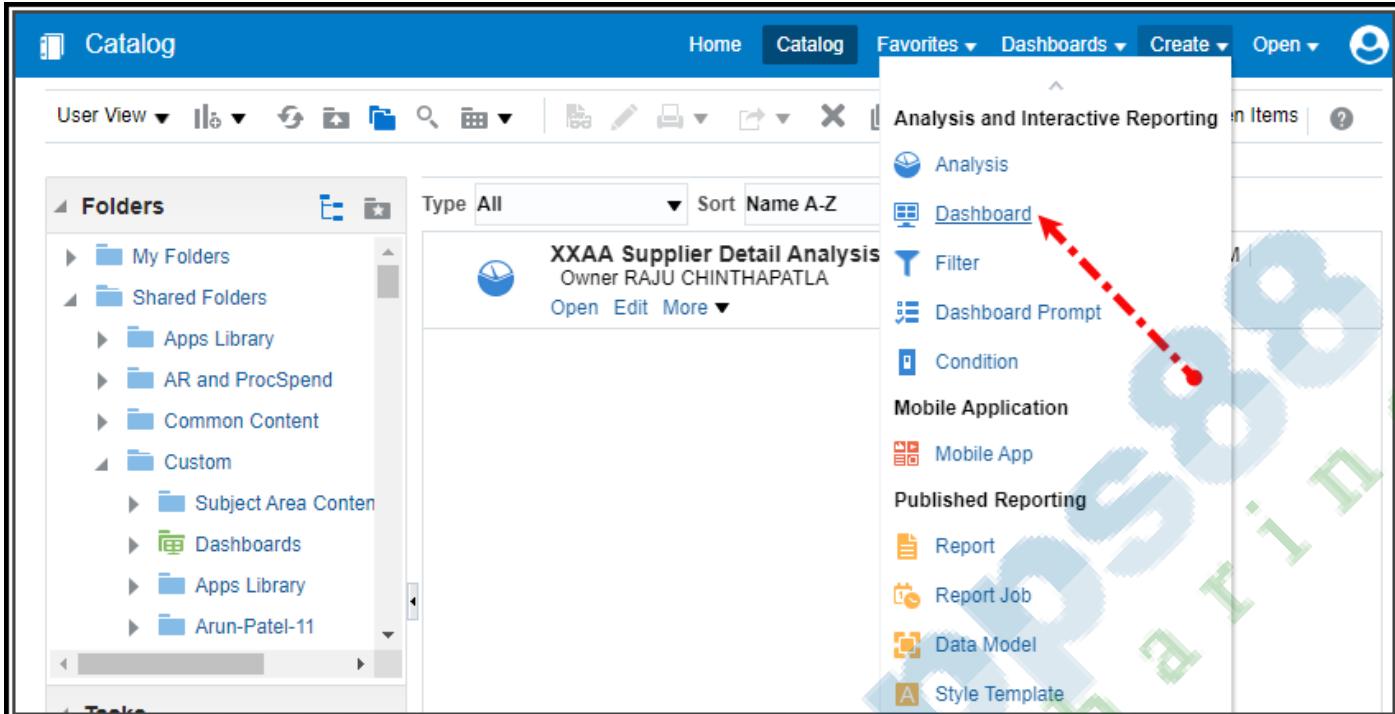


2. Click the **Browse Catalog** icon.

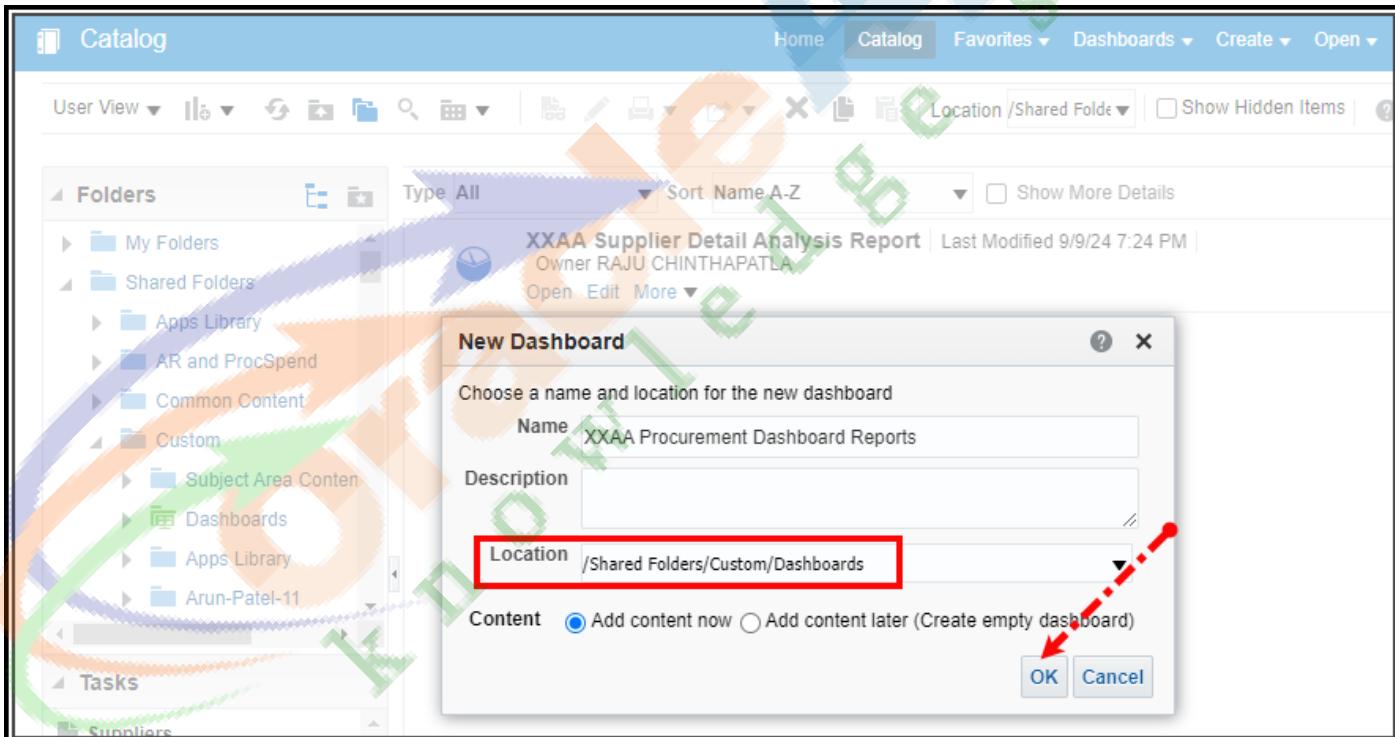


3. Click Create (New).

4. Select the **Dashboard** option from the menu on the top-right of the page.



Enter the Dashboard name and select the desired location and click on ok



Dashboard will open with new page

XXAA Procurement Dashboard Reports

page 1

**Dashboard Obj...**

- Column
- Section
- Alert Section
- Action Link
- Action Link Menu

**Catalog**

- Suppliers
- TASK\_NO
- TEST101
- test\_smart\_form
- Test\_suppliers
- TOLERANCE\_RE
- UN\_NUMBER
- Projects

Drop Content Here

Rename the Page, Click on the Actions and click on Dashboard Properties

XXAA Procurement Dashboard Reports

page 1

**Dashboard Obj...**

- Column
- Section
- Alert Section
- Action Link
- Action Link Menu

**Catalog**

- Suppliers
- TASK\_NO

1

2

Dashboard Properties...

- Print & Export Options...
- Page Report Links...
- Prompts Buttons on Current Page
- Allow Saving Personal Customizations
- Publish Page to Dashboard...
- Advanced Page Properties...

Select the Page and click on Rename Icon

XXAA Procurement Dashboard Properties

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

**General Properties**

Style Default (Alta) Description

Page Size  Fit Content  Fill Browser Window

**Filters and Variables**

Prompts Apply Buttons Use page settings  
Prompts Reset Buttons Use page settings  
Prompts Auto-Complete  Use user preference settings  Off

**Dashboard Pages**

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Buttons:

Enter the Name and click ok

**XXAA Procurement Dashboard Properties**

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

**General Properties**

Style Default (Alta)

Description

**Rename**

Name: Suppliers  
 Preserve references to old name of this item.

Display Name: Suppliers  
 Custom Display Name

**OK** **Cancel**

Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**XXAA Procurement Dashboard Properties**

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

**General Properties**

Style Default (Alta)

Description

Page Size:  Fit Content  Fill Browser Window

**Filters and Variables**

**Dashboard Report Links**

Prompts Apply Buttons: Use page settings

Prompts Reset Buttons: Use page settings

Prompts Auto-Complete:  Use user preference settings  Off

**Dashboard Pages**

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
Suppliers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

XXAA Procurement Dashboard Reports

**Suppliers**

- Dashboard Obj...
- Column
- Section
- Alert Section
- Action Link
- Action Link Menu

**Catalog**

- REQ\_NUMBER
- RTF
- SITE\_ASSIGNME
- status\_code1
- SUPPLIER\_CON
- Suppliers
- TASK\_NO

Drop Content Here

Expand the Folders and select report Drag and Drop to the Dashboard Page

XXAA Procurement Dashboard Reports

**Suppliers**

- Dashboard Obj...
- Column
- Section
- Alert Section
- Action Link
- Action Link Menu

**Catalog**

- SUPPLIER\_CON
- Suppliers
- XXAA Supplier Detail Analysis Report Compound View
- TASK\_NO
- TEST101

XXAA Supplier Detail Analysis Report Compound View

Click on Add Dash Page Icon

The screenshot shows the 'XXAA Procurement Dashboard Reports' application. In the top navigation bar, there are links for Home, Catalog, Favorites, Dashboards, Create, Open, and a user icon. Below the navigation is a toolbar with icons for preview, run, and other dashboard management functions. A red arrow points from the 'Create' button in the top menu to the 'New Page' icon in the toolbar. On the left, a sidebar titled 'Suppliers' contains sections for 'Dashboard Obj...' and 'Catalog'. Under 'Catalog', there is a tree view with nodes like 'SUPPLIER\_CON', 'Suppliers' (which has 'XXAA Suppli' selected), and 'TASK\_NO'. The main area displays a section titled 'Section 2' which contains a report titled 'XXAA Supplier Detail Analysis Report Compound View'. A large watermark reading 'KHOJIE BE' is overlaid on the page.

Enter the New page Name and click Ok

The screenshot shows the same application interface as the first one, but with a modal dialog box in the foreground titled 'Add Dashboard Page'. The dialog has fields for 'Page Name' (containing 'Purchase Orders') and 'Page Description'. At the bottom right of the dialog, there are 'OK' and 'Cancel' buttons, with a red arrow pointing to the 'OK' button. The background of the application shows the same sidebar and section structure as the first screenshot. A large watermark reading 'KHOJIE BE' is overlaid on the page.

XXAA Procurement Dashboard Reports

Suppliers Purchase Orders

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

**Dashboard Obj...**

Column Section

**Catalog**

- Purchasing
  - Data Model
  - Purchase Ord
  - XXAA Purch...**
  - PV\_CATEGORY...
  - PV\_CONCAT\_PE
  - PV\_CUST\_PREF

Drop Content Here

Expand the Folders and select report Drag and Drop to the Dashboard Page

XXAA Procurement Dashboard Reports

Suppliers Purchase Orders

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

**Dashboard Obj...**

Column Section

**Catalog**

- Purchasing
  - Data Model
  - Purchase Ord
  - XXAA Purch...**

XXAA Purchase Order Detail Report

Create the Dashboard Page for the Invoices and drag and Drop the Invoices report

XXAA Procurement Dashboard Reports

Suppliers Purchase Orders Invoices Expenses

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾

**Dashboard Obj...**

Column Section

**Catalog**

- Shared Folders
  - Apps Library
  - AR and ProcSpend
  - Common Content

XXAA Invoice Details Analysis Report Compound View

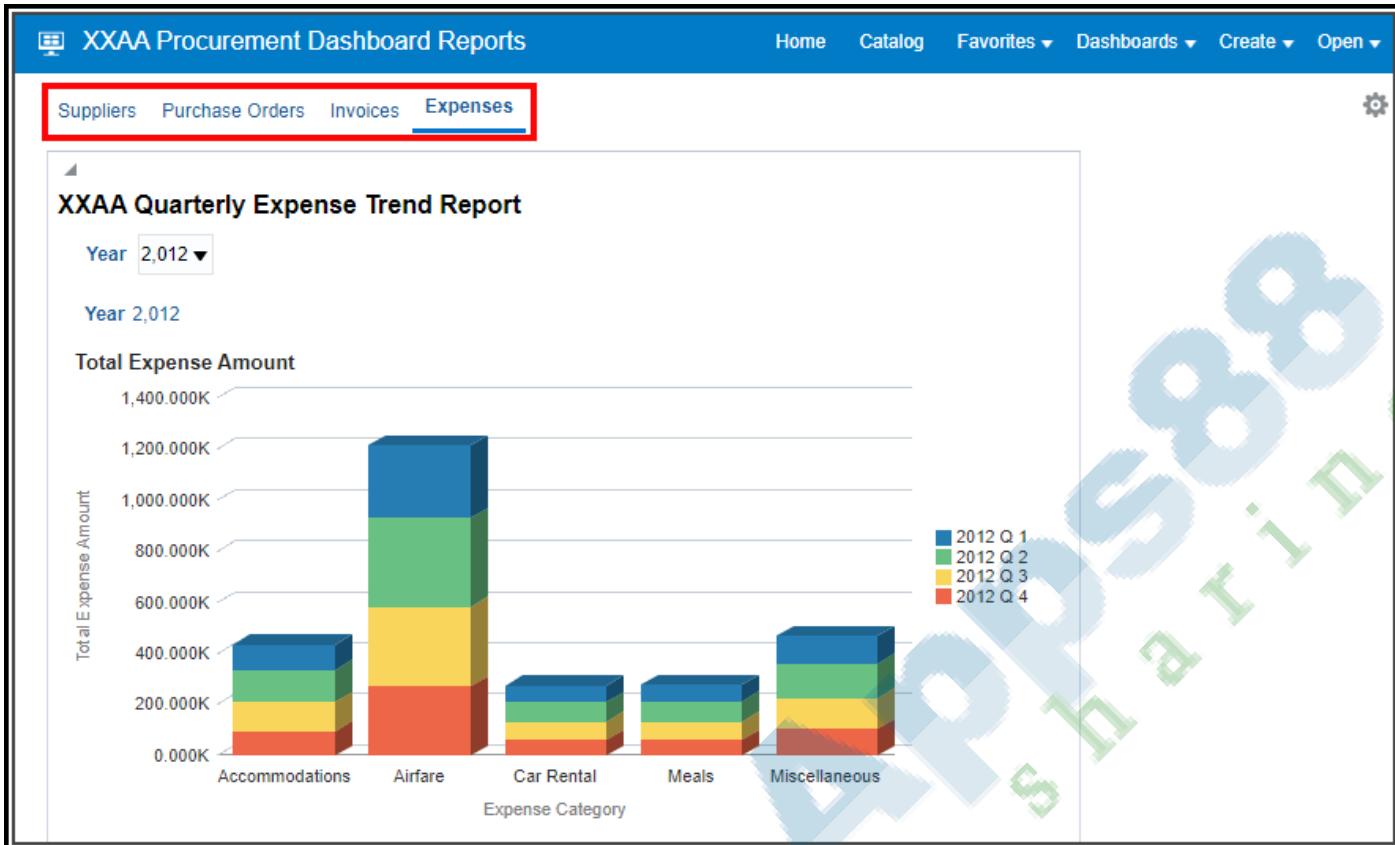
Create the Dashboard Page for the Expenses and drag and Drop the Invoices report

The screenshot shows the Oracle Fusion OTBI interface. The top navigation bar includes Home, Catalog, Favorites, Dashboards, Create, Open, and a user icon. The main menu has tabs for Suppliers, Purchase Orders, Invoices, and Expenses, with Expenses being the active tab. On the left, there's a sidebar with 'Dashboard Obj...' and 'Catalog' sections, including Shared Folders like Apps Library and AR and ProcSpend. The main content area displays a report titled 'XXAA Quarterly Expense Trend Report Compound View' in a 'Section 1' of 'Column 1'.

Click on Run

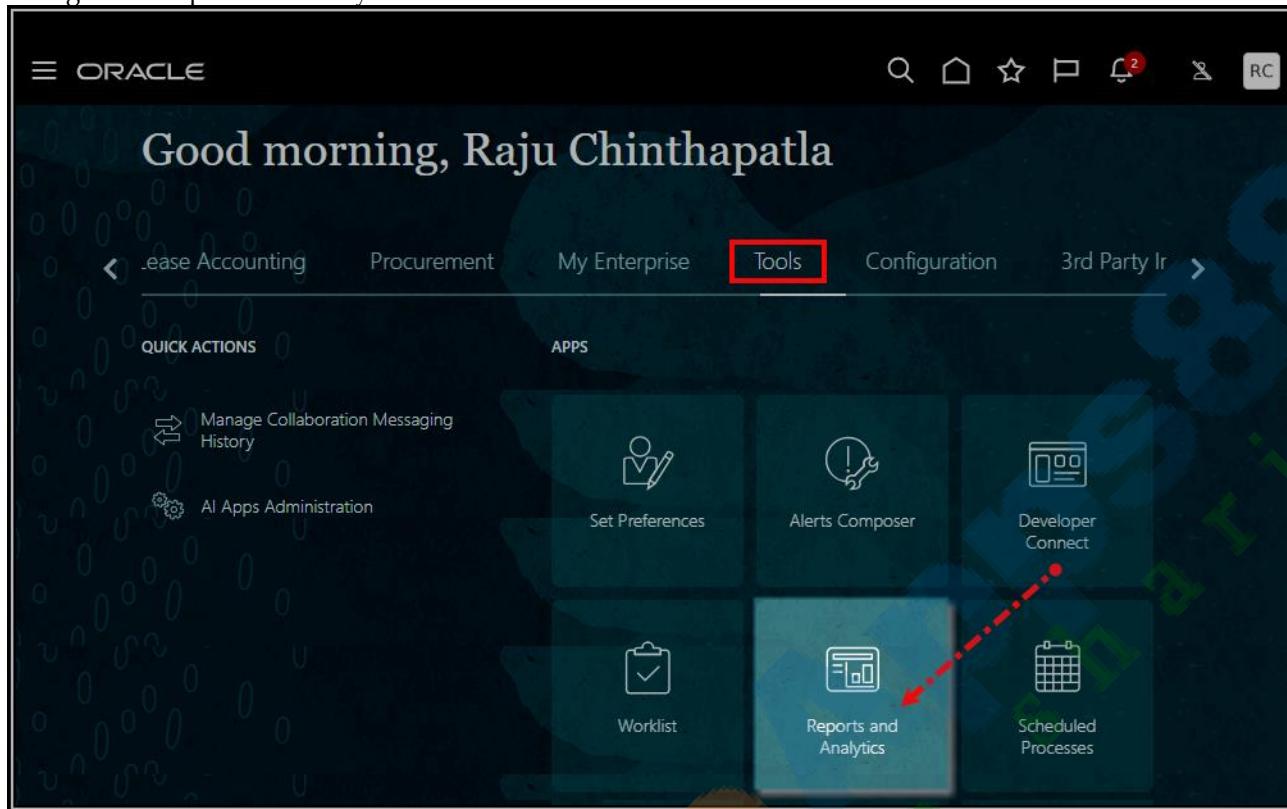
This screenshot is similar to the previous one but includes a red dashed arrow pointing to the 'Run' button in the top right toolbar. The 'Run' button is highlighted with a green circle.

Report output will show in different pages

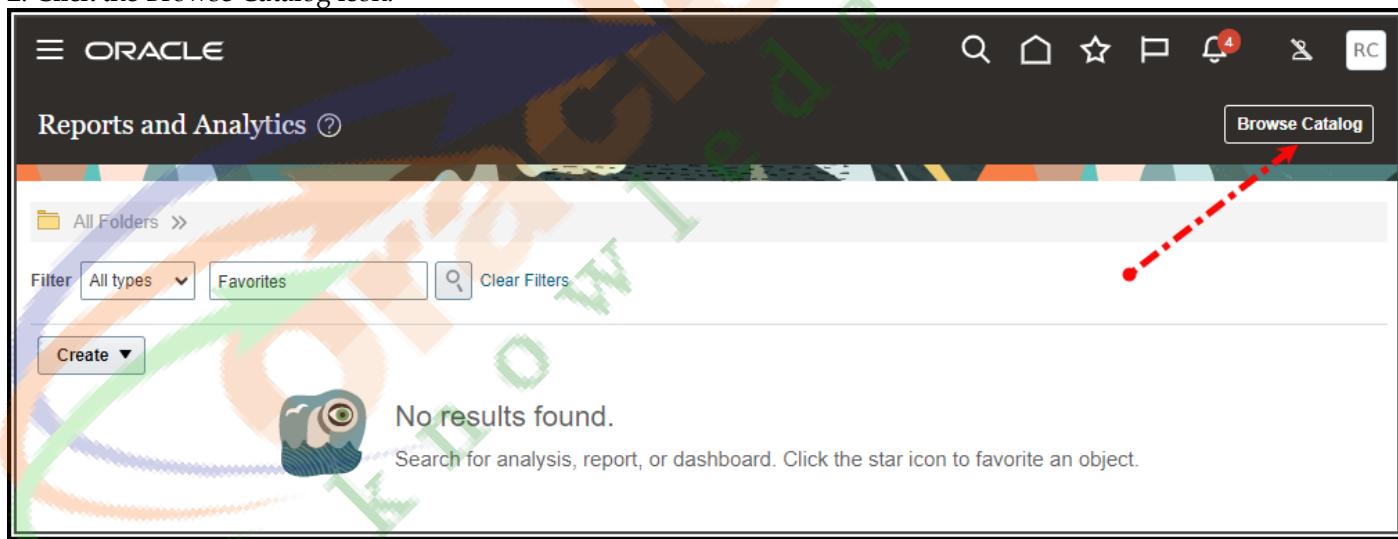


## 8. Creating Dashboard Report with Prompt (Filter)

Navigate to: Report and Analytics.



2. Click the Browse Catalog icon.



**Add the Prompt filter to the existing report or create new report with a column filter as Is Prompted**  
Move to the folder and click on the Edit in the report

Catalog

User View ▾

Type All Sort Name A-Z Show More Details

XXAA Supplier Detail Analysis Report | Last Modified 9/9/24 5:17 PM | Owner RAJU CHINTHAPATLA

Open Edit More ▾

Folders

- Procurement
  - Purchasing
  - Reconciliation
  - Suppliers**
- Projects
- Public Sector
- Redwood
- RelationshipViewer

Move to Criteria, and Filters, Click on the New filter icon and select the column to apply the filter

XXAA Supplier Detail Analysis Report

Criteria Results Prompts Advanced

Subject Area: Supplier - Supplier Real Time

Selected Columns

Supplier Profile	Supplier Site Assignment Data
Supplier Type	Supplier Name
Supplier Number	Client BU

Filters

Supplier Type is equal to / is in Supplier

Supplier Type (1)

Supplier Name (2)

Supplier Number

Client BU

Site

Address Name

Last Name

More Columns ...

Select the Is Prompted as Operator and click on Ok

**New Filter**

Column: Supplier Name  
Operator: is prompted

OK Cancel

### Save the Report

**XXAA Supplier Detail Analysis Report**

Criteria Results Prompts Advanced

**Selected Columns**

Supplier Profile	Supplier Site Assignment Data
Supplier Type	Supplier Name
Supplier Number	Client BU

**Filters**

Supplier Type is equal to / is in Supplier  
AND Supplier Name is prompted

### Create the Dashboard Prompt for the Filter Column

Click Create (New).

Select the **Dashboard** Prompt option from the menu on the top-right of the page.

Catalog

User View ▾

Folders

- pavankumar
- PPM
- PRC
- Procurement
- Purchasing
- Reconciliation
- Suppliers**
- Projects
- Public Sector
- Redwood

Type All Sort Name A-Z

XXAA Supplier Detail Analysis Report  
Owner RAJU CHINTHAPATLA  
Open Edit More ▾

Analysis and Interactive Reporting

- Analysis
- Dashboard
- Filter
- Dashboard Prompt**
- Condition
- Mobile Application
- Mobile App
- Published Reporting
- Report
- Report Job
- Data Model

Select the Subject Area

Catalog

User View ▾

Folders

- My Folders
- Shared Folders
- Apps Library
- AR and ProcSpend
- Common Content
- Custom
- Subject Area Content
- Dashboards
- Apps Library
- Arun-Patel-11

Type All Sort Name A-Z

XXAA Supplier Detail Analysis Report Last Modified 9/9/24 8:33 PM  
Owner RAJU CHINTHAPATLA  
Open Edit More ▾

Select Subject Area

Search

- Provides information about supplier profile change requests.
- Supplier - Supplier Real Time**  
Provides information about suppliers.
- Supplier Import - Supplier Real Time  
Provides ability to export data that can be used to populate Cloud interface templates.
- Supplier Portal - Invoice Real Time  
Provides information about Invoices accessible to external supplier users.

Click on New and click on Prompt

Untitled

Home Catalog Favorites ▾ Dashboards ▾ Create ▾ Open ▾ ?

Definition

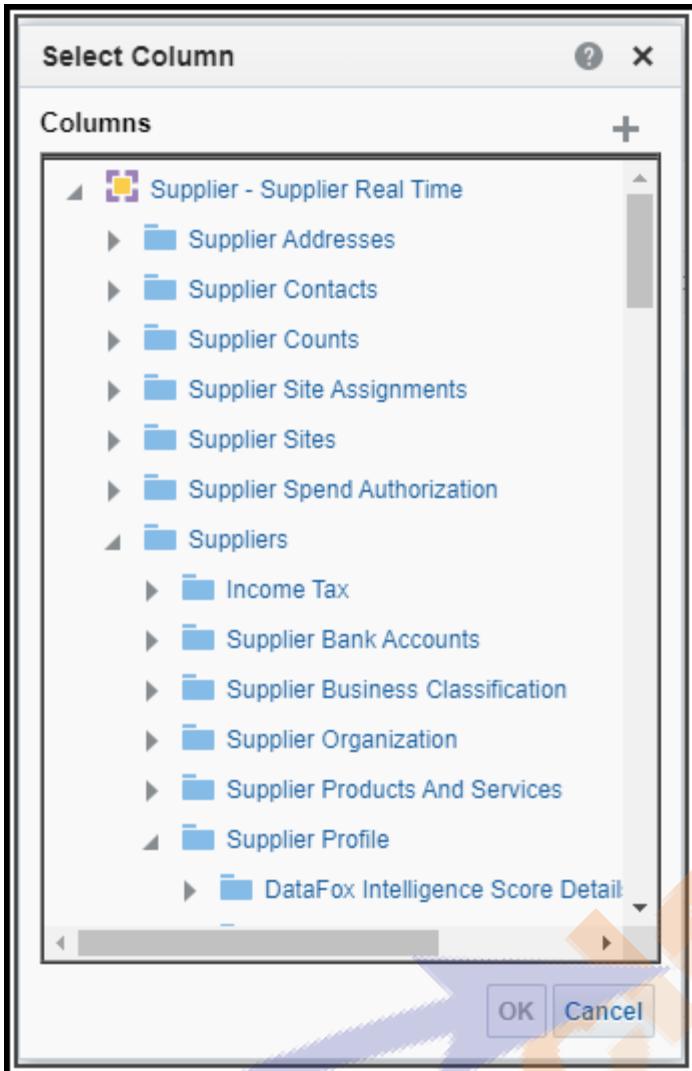
Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	R	Column Prompt...
Page 1	Page				Variable Prompt

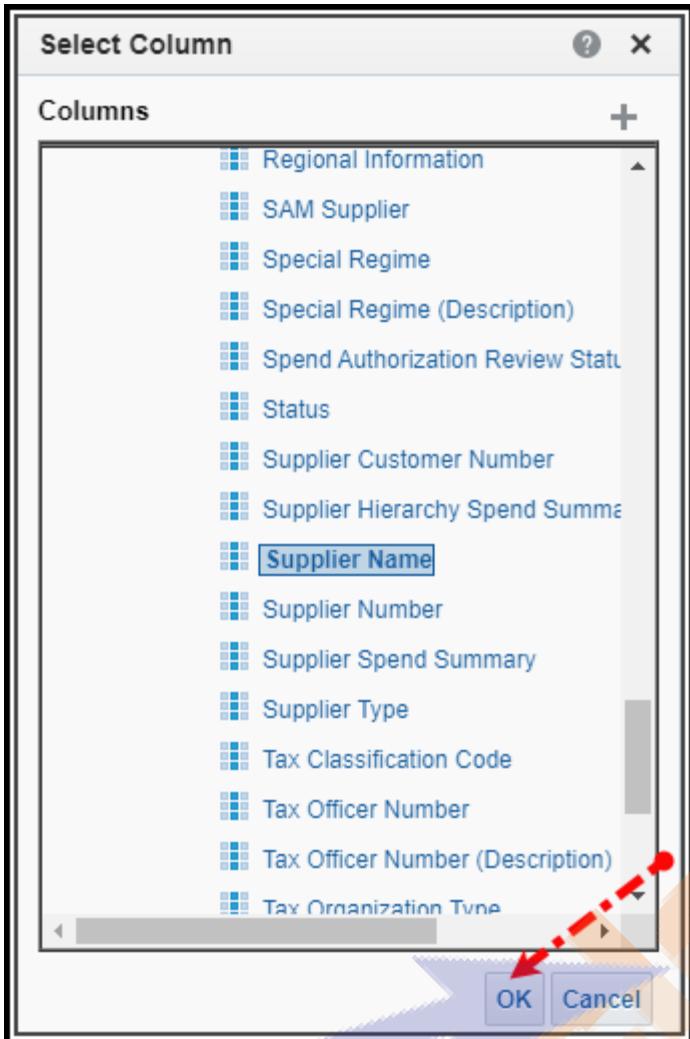
Display

Page 1 /

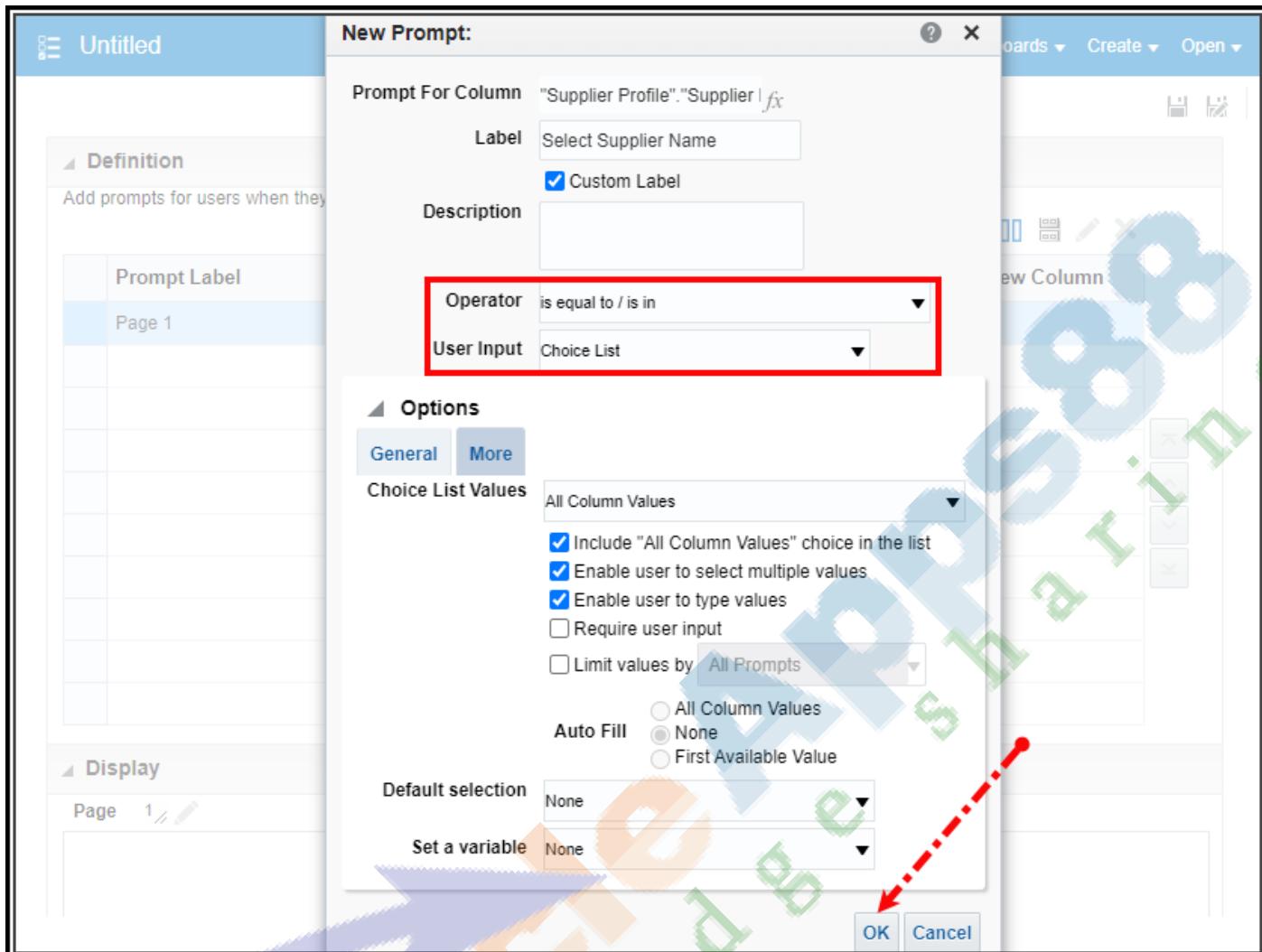
Select the Prompt Column from the folders



Oracle Apps88  
knowledge sharing



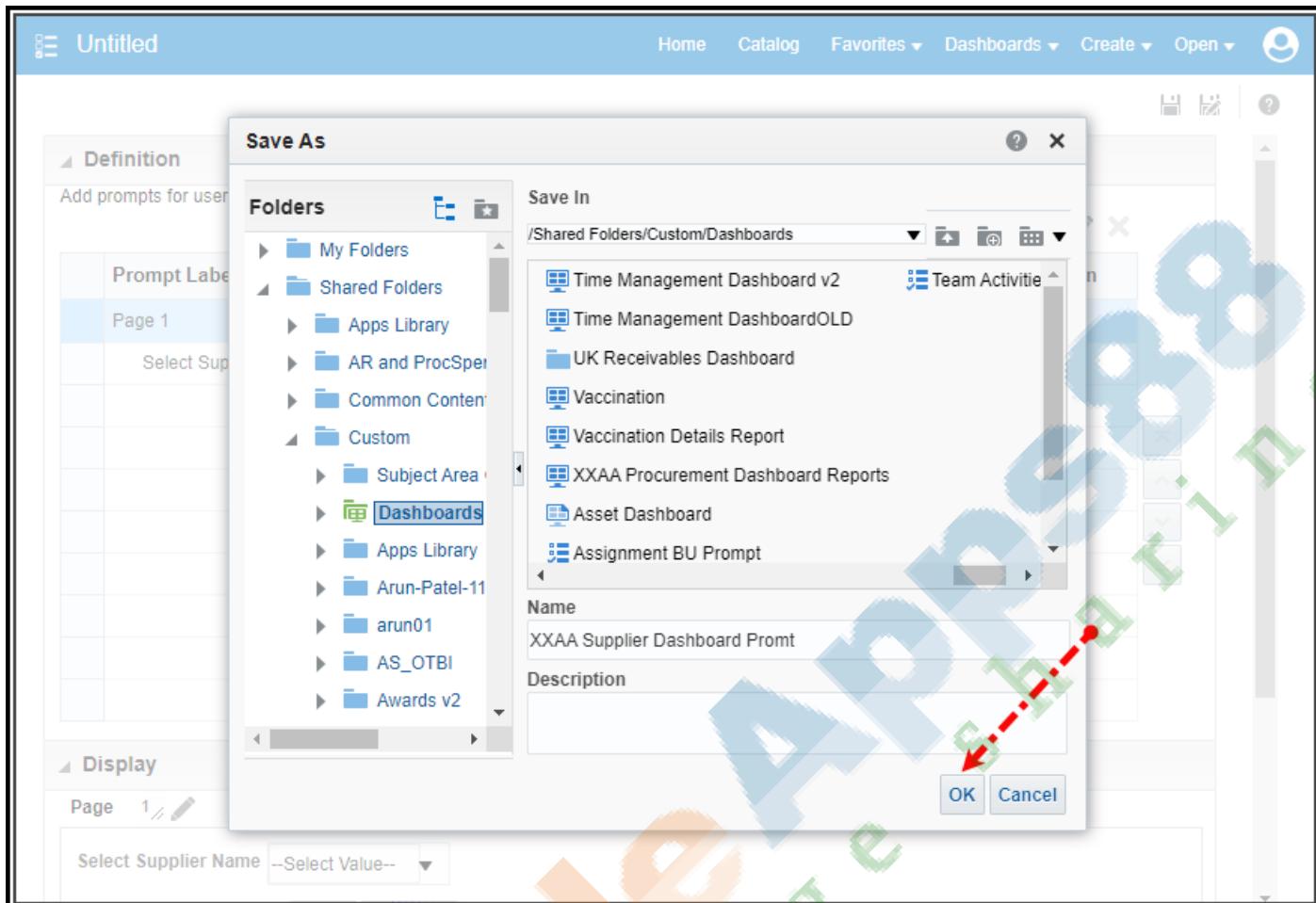
Select the Operator and click on Ok



Click on save the Dashboard Prompt

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1	Page				<input type="checkbox"/>
Select Supplier Name	Column value	Supplier Name			<input type="checkbox"/>

Select the folder and save it



We can verify the Prompt value in the below display section

**XXAA Supplier Dashboard Prompt Report**

Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	New Column
Page 1: Supplier Name	Page				
Select Supplier Name	Column value	Supplier Name			<input type="checkbox"/>

**Display**

Page 1 /

Supplier Name

Select Supplier Name --Select Value--

### Create the Dashboard report for the Dashboard Prompt

Click Create (New).

Select the **Dashboard** option from the menu on the top-right of the page.

**Catalog**

User View

**Folders**

- My Folders
- Shared Folders
- Apps Library
- AR and ProcSpend
- Common Content
- Custom
- Subject Area Content
- Dashboards
- Apps Library
- Arun-Patel-11

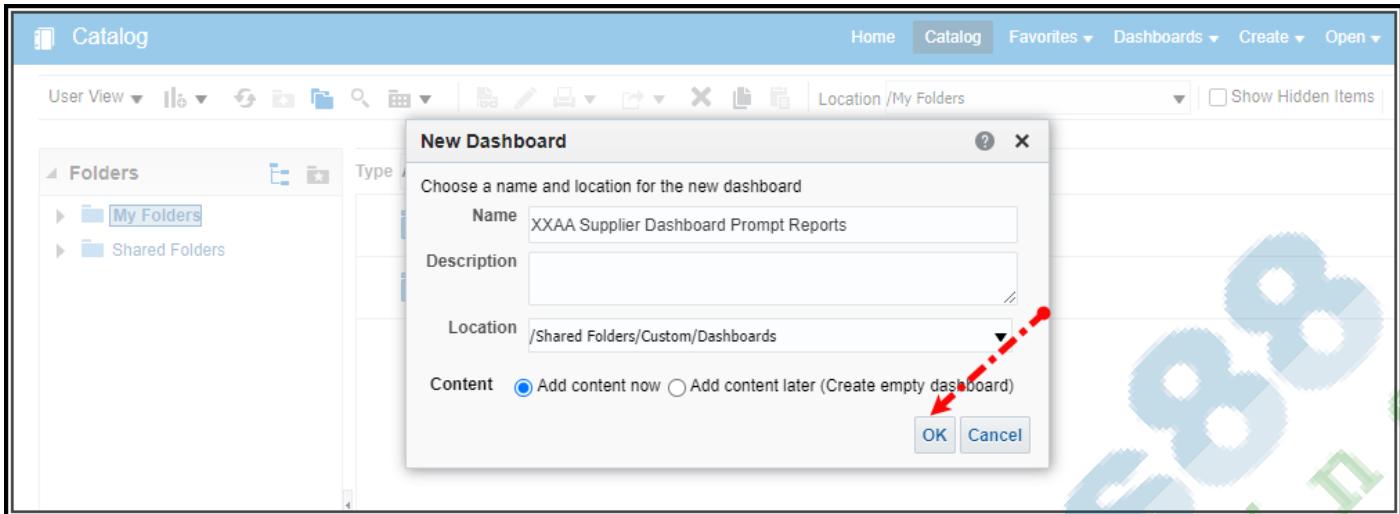
Type All Sort Name A-Z

**XXAA Supplier Detail Analysis**  
Owner RAJU CHINTHAPATLA

**Analysis and Interactive Reporting**

- Analysis
- Dashboard**
- Filter
- Dashboard Prompt
- Condition
- Mobile Application
- Mobile App
- Published Reporting
- Report
- Report Job
- Data Model
- Style Template

Enter the Dashboard name and select the desired location and click on ok



Dashboard will open with new page

The screenshot shows the 'XXAA Supplier Dashboard Prompt Reports' page. The left sidebar lists 'Dashboard Objects' including Column, Section, Alert Section, Action Link, Action Link Menu, Link or Image, Embedded Content, Text, and Folder. The main content area has a large placeholder box with the text 'Drop Content Here'.

Rename the Page, Click on the Actions and click on Dashboard Properties

The screenshot shows the Oracle Fusion OTBI interface. On the left, there's a sidebar with categories like 'Dashboard Obj...', 'Catalog', and 'Shared Folders'. The main area is titled 'XXAA Supplier Dashboard Prompt Reports' and has a placeholder 'Drop Content Here'. At the top right, there's a toolbar with icons for Home, Catalog, Favorites, Dashboards, Create, Open, and a gear icon. A red arrow labeled '1' points from the gear icon to a context menu. Another red arrow labeled '2' points from the 'Dashboard Properties...' option in the menu to its corresponding button in the toolbar.

Select the Page and click on Rename Icon

This screenshot shows the 'Dashboard Properties' dialog box for the 'XXAA Supplier Dashboard Prompt Reports' page. The dialog has tabs for 'General Properties' and 'Advanced Properties'. Under 'General Properties', there's a 'Style' dropdown set to 'Default (Alta)', a 'Description' field, and options for 'Page Size' (radio buttons for 'Fit Content' and 'Fill Browser Window'). Below that are sections for 'Filters and Variables', 'Dashboard Report Links', 'Prompts Apply Buttons', 'Prompts Reset Buttons', and 'Prompts Auto-Complete'. The 'Prompts Auto-Complete' section has a radio button for 'Use user preference settings' (selected) and one for 'Off'. The 'Dashboard Pages' section contains a table with a single row for 'page 1'. The first column is 'Pages', the second is 'Hide Page' (checkbox), the third is 'Show Add To Briefing Book' (checkbox checked), and the fourth is 'Prompt before Opening' (checkbox). A red arrow labeled '1' points to the 'Rename' icon in the 'Pages' column of the table. A red arrow labeled '2' points to the 'OK' button at the bottom right of the dialog.

Enter the Name and click ok

**XXAA Supplier Dashboard Pro**

**Dashboard Properties**

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

**General Properties**

Style Default (Alta)

**Rename**

Name	Suppliers	<input type="checkbox"/> Preserve references to old name of this item.
Display Name	Suppliers	<input checked="" type="checkbox"/> Custom Display Name
		<b>OK</b> <b>Cancel</b>

**Prompts Auto-Complete**  Use user preference settings  Off

**Dashboard Pages**

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
page 1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

**XXAA Supplier Dashboard Pro**

**Suppliers**

**Dashboard Properties**

Set properties for the Dashboard. Delete, rename, and reorder Dashboard pages.

**General Properties**

Style Default (Alta)

Description

**Page Size**  Fit Content  Fill Browser Window

**Filters and Variables**

**Dashboard Report Links**

**Prompts Apply Buttons** Use page settings

**Prompts Reset Buttons** Use page settings

**Prompts Auto-Complete**  Use user preference settings  Off

**Dashboard Pages**

Except for Hide and Reorder, clicking Cancel will not undo operations in this section.

Pages	Hide Page	Show Add To Briefing Book	Prompt before Opening
Suppliers	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

The screenshot shows the Oracle Fusion OTBI interface. At the top, there's a navigation bar with links for Home, Catalog, Favorites, Dashboards, Create, Open, and a user icon. Below the navigation bar is a toolbar with icons for file operations like New, Open, Save, and Print, along with Preview and Run buttons. The main area is titled "XXAA Supplier Dashboard Prompt Reports". On the left, a sidebar titled "Suppliers" is highlighted with a red box. The sidebar contains a tree view of "Dashboard Objects" and "Catalog". Under "Catalog", there are several items listed, including "Vaccination Details Report", "XXAA Procurement Dashboard Reports", "XXAA Supplier Dashboard Prompt Reports", "Asset Dashboard", "Assignment BU Prompt", "Fixed Assets", "Team Activities Prompt", and "XXAA Supplier Dashboard Prompt". A large watermark reading "Oracle Apps88" is diagonally across the page.

Expand the Folders and select Dashboard Prompt and Drag and Drop to the Dashboard Page at top of the report

This screenshot shows the same OTBI interface as the previous one, but now it's displaying a specific report page for "XXAA Supplier Dashboard Prompt Reports". The title bar and navigation bar are identical. The main content area shows a single section labeled "Section 1" with a placeholder "Drop Content Here". On the left, the sidebar shows the "Suppliers" folder expanded. The "Catalog" section is also expanded, and the item "XXAA Supplier Dashboard Prompt" is selected and highlighted with a red box. A red dashed arrow points from the selected item in the catalog to its position on the report page. A large watermark reading "Weedbed" is diagonally across the page.

Now drag and drop the Analysis report to a page after the dashboard prompt

XXAA Supplier Dashboard Prompt Reports

Suppliers

Dashboard Objects

- Column
- Section
- Alert Section
- Action Link
- Action Link Menu
- Link or Image
- Embedded Content
- Text
- Folder

Catalog

- SUPPLIER\_CONTACT
- Suppliers
- XXAA Supplier Detail Analysis Report**
- TASK\_NO
- TEST101

Column 1

Section 1

XXAA Supplier Dashboard Prompt

XXAA Supplier Detail Analysis Report Compound View

Save the report

XXAA Supplier Dashboard Prompt Reports

Suppliers

Dashboard Objects

- Column
- Section
- Alert Section
- Action Link
- Action Link Menu
- Link or Image
- Embedded Content
- Text
- Folder

Catalog

- SUPPLIER\_CONTACT
- Suppliers
- XXAA Supplier Detail Analysis Report**
- TASK\_NO
- TEST101

Column 1

Section 1

XXAA Supplier Dashboard Prompt

XXAA Supplier Detail Analysis Report Compound View

Click on the Run

Select the Supplier and click on Apply

Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Name	Last Update Date
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare	ABC
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	ABC Supremo US	ABC
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Norway	ABC Norway	ABC
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Sweden	ABC Sweden	ABC
Supplier	ABC Consulting	1288	US1 Business Unit	ABC US1	ABC US1	ABC

Change report output Page settings  
Click on the Actions and Click on Print & Export Options

XXAA Supplier Dashboard Prompt Reports

Suppliers

Dashboard Objects:

- Column
- Section
- Alert Section
- Action Link
- Action Link Menu
- Link or Image
- Embedded Content
- Text
- Folder

Catalog:

- Shared Folders

Section 1

XXAA Supplier Dashboard Prompt

Section 2

XXAA Supplier Detail Analysis Report Compound View

Print & Export Options...

- Print & Export Options...
- Page Report Links...
- Prompts Buttons on Current Page
- Allow Saving Personal Customizations
- Publish Page to Dashboard...
- Advanced Page Properties...

Change the page settings

XXAA Supplier Dashboard Prompt Reports

Suppliers

Dashboard Objects:

- Column
- Section
- Alert Section
- Action Link
- Action Link Menu
- Link or Image
- Embedded Content
- Text
- Folder

Catalog:

- Shared Folders

Print & Export Options - Suppliers

Page Settings

Paper Size: A3 (297mm x 420mm) ▾

Orientation: Custom ▾

PDF:  Portrait  Landscape

Print Rows: Visible ▾

Hide Margins

Include

Charts  Header  Edit

Images  Footer  Edit

Formatting

Column Options

Fixed Column Width: 0 px

Standard Print Layouts

Printable HTML  Current Page

Printable PDF  Entire Dashboard

Standard Excel Output

Custom Print & Export Layouts

No custom layouts have been defined for this page.  
Choose [Create Layouts](#) to define custom print layouts.

OK Cancel

To get the Print and Export links in the report, Click on Page report Links in the Actions

XXAA Supplier Dashboard Prompt Reports

Suppliers

Dashboard Objects Catalog Shared Folders

Column 1

Section 1

XXAA Supplier Dashboard Prompt

XXAA Supplier Detail Analysis Report Compound View

Home Catalog Favorites Dashboards Create Open

Preview Run Dashboard Properties... Print & Export Options... Page Report Links... Prompts Buttons on Current Page Allow Saving Personal Customizations Publish Page to Dashboard... Advanced Page Properties...

Select the links and click on Ok

XXAA Supplier Dashboard Prompt Reports

Suppliers

Dashboard Objects Catalog Shared Folders

Column 1

Section 1

Report Links

Inherit Dashboard Settings  Customize

Analyze  Edit

Export  Refresh

Add to Briefing Book  Print

Copy

OK Cancel

XXAA Supplier Detail Analysis Report Compound View

Home Catalog Favorites Dashboards Create Open

Save the report

XXAA Supplier Dashboard Prompt Reports

Suppliers

Dashboard Objects

- Column
- Section
- Alert Section
- Action Link
- Action Link Menu
- Link or Image
- Embedded Content
- Text
- Folder

Catalog

- SUPPLIER\_CONTACT
- Suppliers
- XXAA Supplier Detail Analysis Report**
- TASK\_NO

Section 1

XXAA Supplier Dashboard Prompt

XXAA Supplier Detail Analysis Report Compound View

Run

Verify the dashboard report from the Catalog

Catalog

User View

Folders

- Custom
  - Subject Area Content
  - Dashboards**
  - Apps Library
  - Arun-Patel-11
  - arun01
  - AS\_OTBI
  - Awards v2

Type All Sort Name A-Z Show More Details

	Vaccination Details Report	Last Modified 5/26/22 9:50 AM	Owner Curtis Feitty	<a href="#">Expand</a> <a href="#">Open</a> <a href="#">Edit</a> <a href="#">More</a>
	XXAA Procurement Dashboard Reports	Last Modified 9/9/24 8:05 PM	Owner RAJU CHINTHAPATLA	<a href="#">Expand</a> <a href="#">Open</a> <a href="#">Edit</a> <a href="#">More</a>
	<b>XXAA Supplier Dashboard Prompt Reports</b>	Last Modified 9/10/24 4:37 AM	Owner RAJU CHINTHAPATLA	<a href="#">Expand</a> <a href="#">Open</a> <a href="#">Edit</a> <a href="#">More</a>
	Asset Dashboard	Last Modified 5/26/22 9:50 AM	Owner System Account	<a href="#">Open</a> <a href="#">Edit</a> <a href="#">More</a>

Select the values from the list and Apply  
We can see the links at the bottom of the report

XXAA Supplier Dashboard Prompt Reports

Supplier Name  
Select Supplier Name ABC Consulting ▾  
Apply Reset ▾

### XXAA Supplier Detail Analysis Report

Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Name	Last
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare	Abt
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	ABC Supremo US	Abt
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Norway	ABC Norway	Abt
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Sweden	ABC Sweden	Abt
Supplier	ABC Consulting	1288	US1 Business Unit	ABC US1	ABC US1	Abt

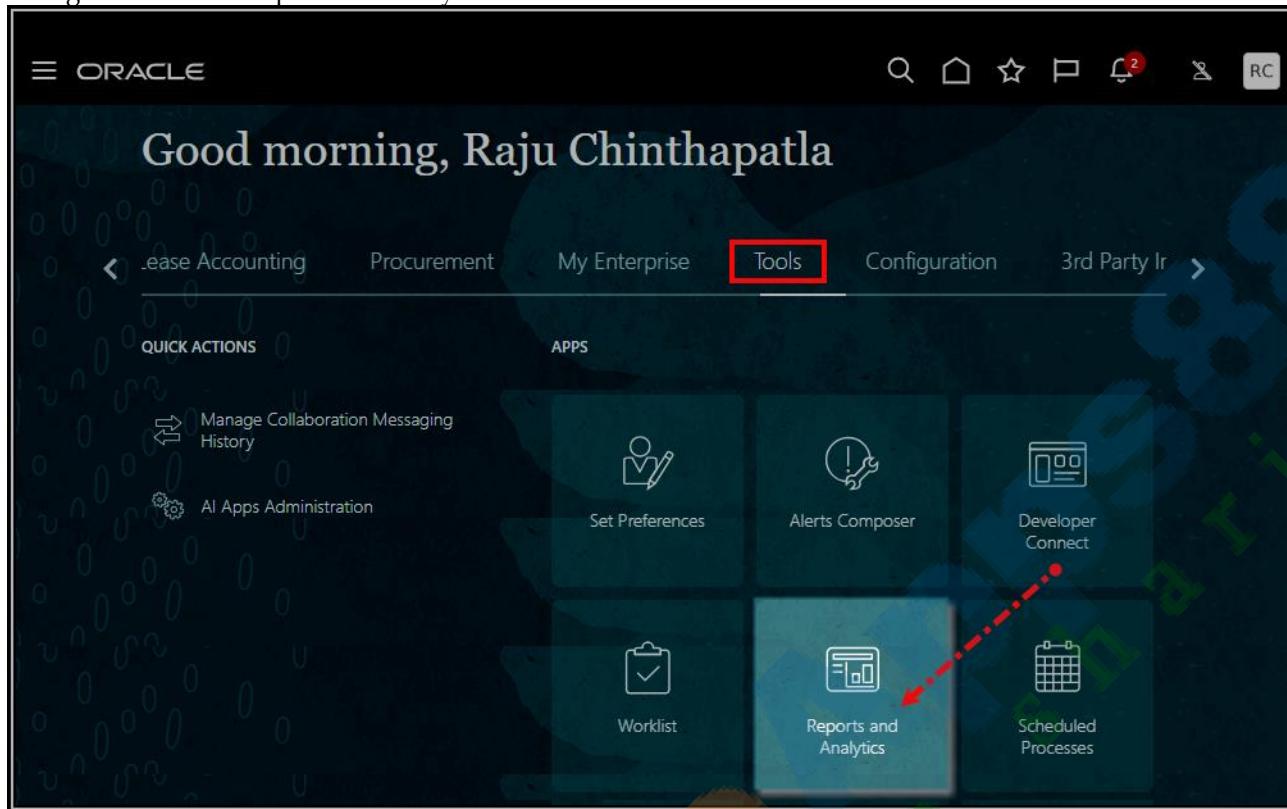
◀ ▶

Edit - Refresh - Print - Export - Copy

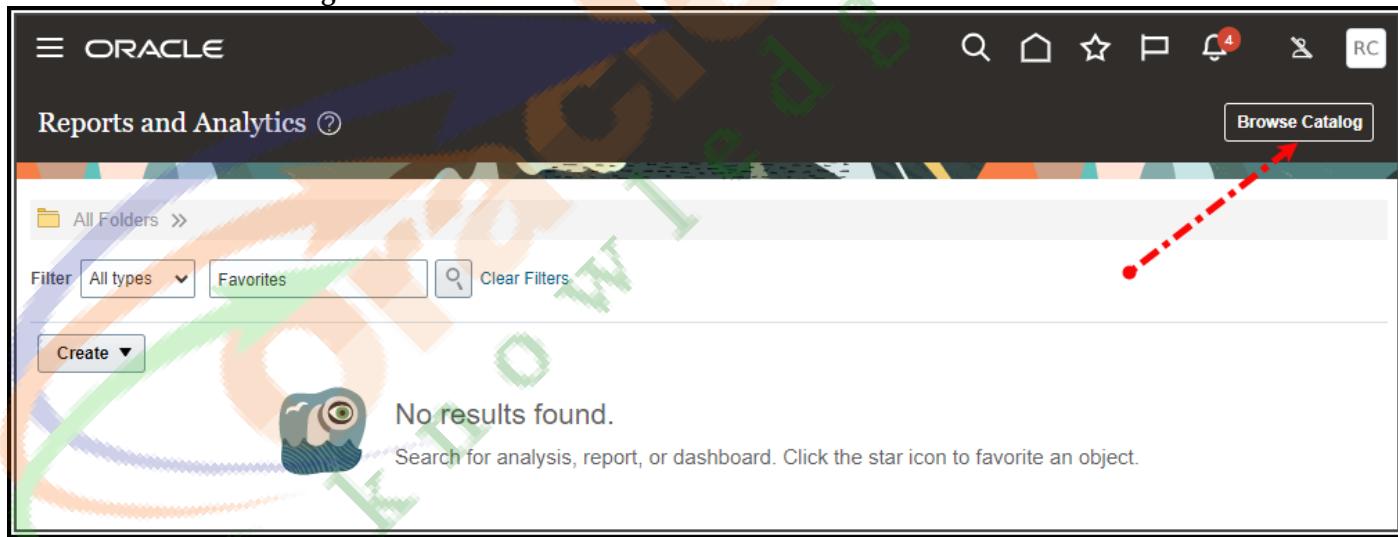


## 9. Creating Master-Child Analysis Report with Prompt (Filter)

Navigate to: Tool → Report and Analytics.

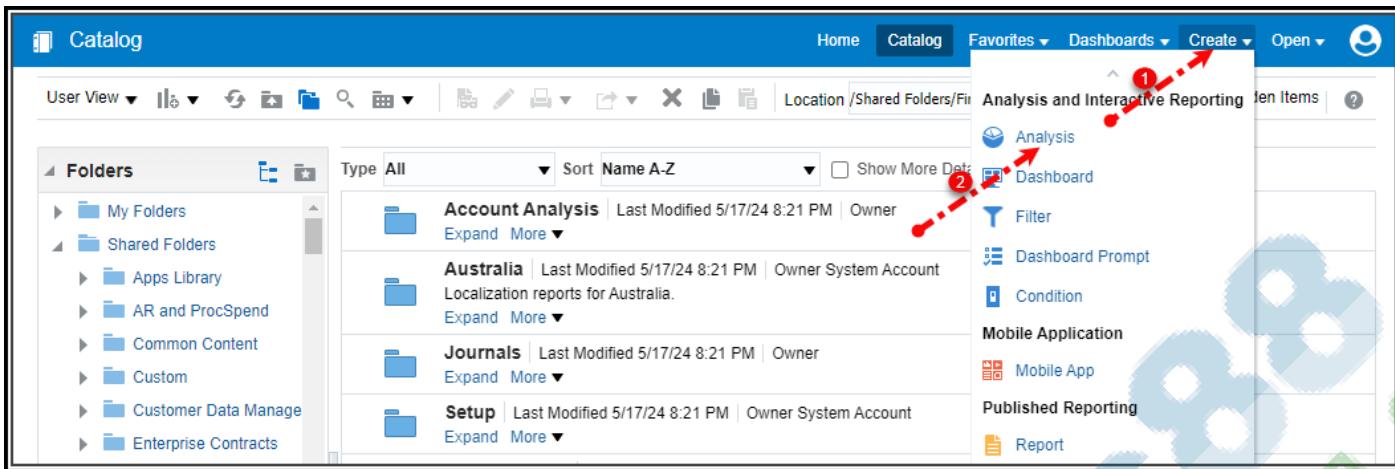


2. Click the **Browse Catalog** icon.



3. Click Create (New).

4. Select the **Analysis** option from the menu on the top-left of the page.



### Creating the Master Analysis Report

5. Select the Supplier - Supplier Real Time subject area.

Select Subject Area

Search

- Provides information about supplier profile change requests.
- Supplier - Supplier Real Time** Provides information about suppliers.
- Supplier Import - Supplier Real Time Provides ability to export data that can be used to populate Cloud interface templates.
- Supplier Portal - Invoice Real Time Provides information about Invoices accessible to external supplier users.
- Supplier Portal - Purchasing Real Time Provides information about Purchase Orders accessible to external supplier users.

6. Expand the Folders and select the field and Double-click on the field, it will populate on the right side  
Or select the field and Drag and drop to right side. Save it

### Creating the Child Analysis Report

Select the Payables Invoices - Transactions Real Time subject area.

The screenshot shows the Oracle OTBI Catalog interface. On the left, there's a sidebar with 'Folders' containing 'My Folders', 'Shared Folders', and various 'Apps Library' and 'Custom' categories. The main area displays a report titled 'XXAA Supplier Master Analysis Report'. A 'Select Subject Area' dialog box is open on the right, listing several subject areas under 'Payables Invoices'. A red arrow highlights the first item in the list: 'Payables Invoices - Prepayment Applications Real Time'.

Expand the Folders and select the field and Double-click on the field, it will populate on the right side  
Or select the field and Drag and drop to right side. Save it

The screenshot shows the 'XXAA Invoice Details Analysis Report' interface. On the left, there's a 'Subject Area' tree view with various nodes like 'Payables Invoices - Installment', 'Business Unit', etc. On the right, there's a 'Selected Columns' grid with columns for 'Business Unit', 'Supplier', 'Supplier Site', and 'General Information'. The 'Business Unit' column has sub-columns for 'Business Unit Name' and 'Site'. A purple arrow points from the 'Subject Area' tree on the left towards the 'Selected Columns' grid on the right.

Connect between these Master and Child analysis reports with Prompt  
Go to **Master** Analysis Report, Move to the Results tab, Click on the Link Filter column Actions and click on Column Properties

XXAA Supplier Master Analysis Report 1

Criteria Results Prompts Advanced

Table

Subject Area... Search Up Down >

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
  - Supplier Sites
  - Supplier Spend Authorization
  - Suppliers

Catalog > [ ] [ ]

List All

Editing from: "Compound Layout" Done Revert

Supplier Type	Supplier Name	Supplier Number	Client RII	Site	Address Name
Supplier	49K Home supplier	1480		S2_Address	S2_Address
Supplier	ABC	123		ABC Healthcare	ABC Healthcare
Supplier	ABC Consulting	1288		ABC Supremo US	ABC Supremo
Supplier	ABC Consulting	1288			

Layout

Columns and Measures Sigma xyz

Supplier Profile

Supplier Type Supplier Name Supplier Number Client BU

Remove Column

Move to Interactions tab, Select the Action Links from the Primary interactions and click on the new icon

XXAA Supplier Master Analysis Report

Criteria Results Prompts Advanced

Table

Subject Area... Search Up Down >

- Supplier - Supplier Real Time
  - Supplier Addresses
  - Supplier Contacts
  - Supplier Counts
  - Supplier Site Assignments
  - Supplier Sites
  - Supplier Spend Authorization
  - Suppliers

Catalog > [ ] [ ]

List All

Home Catalog Favorites Dashboards Create Open

Column Properties

Interaction

Primary Interaction Default (Drill)

Action Links

Link Text	Action	Show Link
Add Menu Action Links		[ ]

Do not display in a popup if only one action link is available at runtime  
 Enable on Totals

OK Cancel

Click on the New actions select the Navigate to BI Content

**Column Properties**

**New Action Link ...**

**Action**

**Show Link**  Always  Conditionally

**LINK TEXT** **ACTION** **SHOW LINK**

Add Menu Action Links

Do not display in a popup if only one action link is available at runtime  
 Enable on Totals

Select the Child analysis report

**Select BI Content For Action**

**Folders**

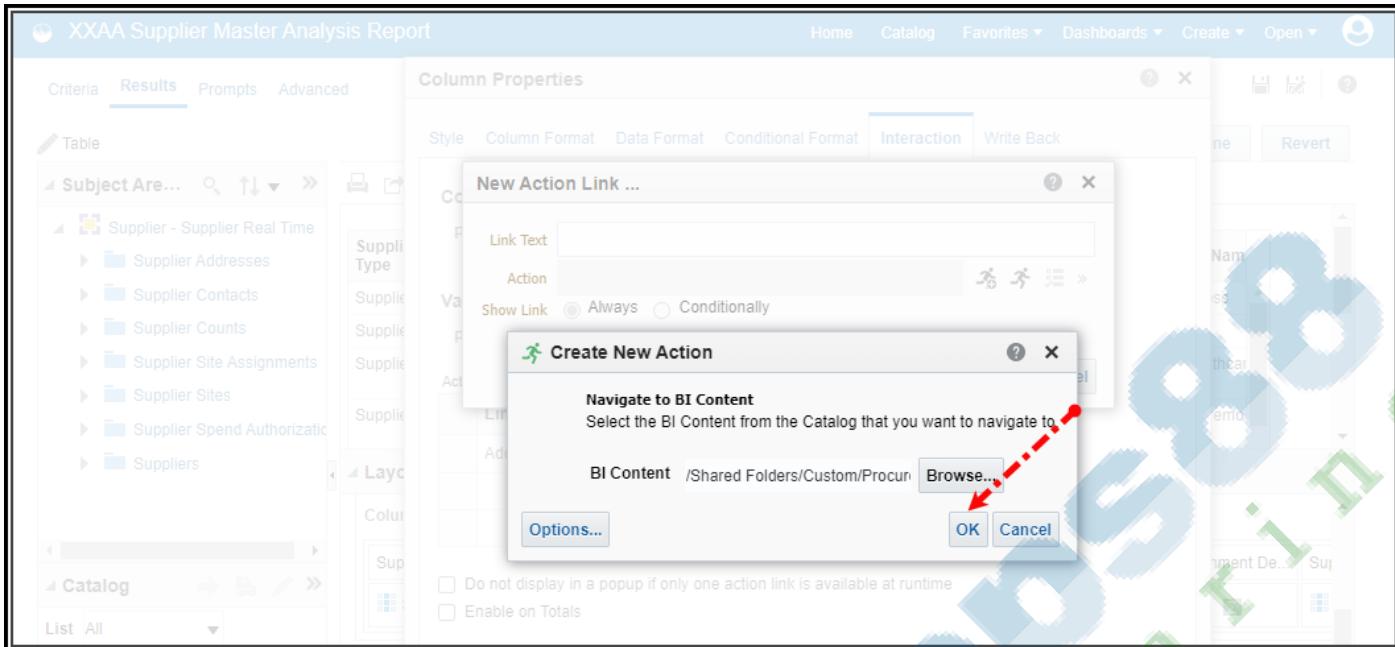
**Open In** /Shared Folders/Custom/Procurement/Suppliers

**Name** XXAA Invoice Details Analysis Report

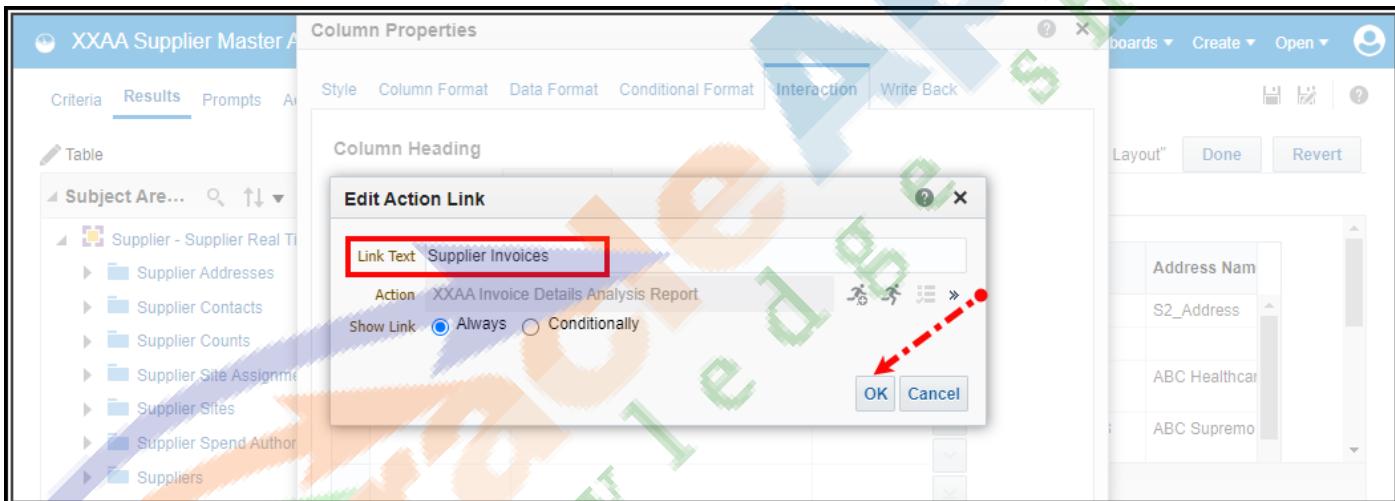
**Description**

**OK** **Cancel**

Click on Ok



Click on Ok



Click on Ok and Save it

**Column Properties**

Criteria Results Prompts Advanced

Table Subject Area Catalog List All

Style Column Format Data Format Conditional Format Interaction Write Back

**Column Heading**

Primary Interaction Default (Drill) ▾

**Value**

Primary Interaction Action Links ▾

**Action Links**

Link Text	Action	Show Link
Supplier Invoices	XXAA Invoice Details Analysis Report	Always Enabled

Do not display in a popup if only one action link is available at runtime  
 Enable on Totals

OK Cancel

We can see the link in the Results tab and Master report changes are done

**XXAA Supplier Master Analysis Report**

Criteria Results Prompts Advanced

Table Subject Area Catalog List All

Home Catalog Favorites Dashboards Create Open

Editing from: "Compound Layout" Done Revert

Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Name
Supplier	49K Home supplier	1288	9K HYD BU	S2_Address	S2_Address
Supplier	ABC				
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	ABC Supremo

Go to the Child Analysis Report, move to Criteria, Click on the Link Filter column Actions, and click on the filter

Select the **Is Prompted** as the operator and click on Ok

Save it, and the Child changes are done

Got to the Catalog and Open the Master Analysis Report  
Link is created and click on the details

**XXAA Supplier Master Analysis Report**

Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Nam
Supplier	49K Home supplier	1480	49K HYD BU	S2_Address	S2_Address
Supplier	ABC	123			
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	ABC Supremo
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Norway	ABC Norway
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Sweden	ABC Sweden
Supplier	ABC Consulting	1288	US1 Business Unit	ABC US1	ABC US1

Edit - Refresh - Print - Export - Add to Briefing Book - Email - Copy

Child Analysis Report will open with details

**XXAA Invoice Details Analysis Report**

BU Name	Supplier Name	Supp Num	Site	Invoice Number	Invoice Date	Instal Numt
Supremo US Business Unit	ABC Consulting	1288	ABC Supremo US	SUP111	2/16/20	
Supremo US Business Unit	ABC Consulting	1288	ABC Supremo US	SUP300	6/16/21	
Supremo US Business Unit	ABC Consulting	1288	ABC Supremo US	SUP301	6/17/21	
Supremo US Business Unit	ABC Consulting	1288	ABC Supremo US	SUP314	7/13/21	

Edit - Refresh - Print - Export - Add to Briefing Book - Email - Copy

We can create the Dashboard Prompted report for the Mast-Child Analysis Report  
Create the Dashboard and Select the Prompt and master report into page and save it

The screenshot shows the Oracle Fusion OTBI interface. At the top, there's a navigation bar with links for Home, Catalog, Favorites, Dashboards, Create, and Open. Below the navigation is a toolbar with icons for preview, run, and other report management functions. The main area is titled "XXAA Master-Child Dashboard Reports". On the left, there's a sidebar under "Suppliers" with sections for "Dashboard Obj..." and "Catalog". The "Catalog" section includes "Shared Folders". The main content area contains two sections: "Section 1" and "Section 2". "Section 1" contains a placeholder icon labeled "XXAA Supplier Dashboard Prompt". "Section 2" contains a placeholder icon labeled "XXAA Supplier Master Analysis Report Compound View".

Open the Dashboard report from the Catalog

The screenshot shows the Oracle Catalog interface. At the top, there's a navigation bar with links for Home, Catalog, Favorites, Dashboards, Create, and Open. Below the navigation is a toolbar with various icons. The main area is titled "Catalog". On the left, there's a sidebar under "Folders" with a tree view showing "Custom", "Subject Area Content", "Dashboards" (which is selected and highlighted in blue), "Apps Library", "Arun-Patel-11", "arun01", "AS\_OTBI", and "Awards v2". The main content area lists reports under "Dashboards": "Vaccination Details Report", "XXAA Master-Child Dashboard Reports", "XXAA Procurement Dashboard Reports", and "XXAA Supplier Dashboard Prompt Reports". Each report entry includes a "More" dropdown menu. Red arrows point from the text "Click on the Master link" to the "More" dropdown menu of the "XXAA Master-Child Dashboard Reports" entry.

Click on the Master link

**XXAA Master-Child Dashboard Reports**

Supplier Name  
Select Supplier Name ABC Consulting ▾  
Apply Reset ▾

**XXAA Supplier Master Analysis Report**

Supplier Type	Supplier Name	Supplier Number	Client BU	Site	Address Name	Last
Supplier	ABC Consulting	1288	Healthcare US Business Unit	ABC Healthcare	ABC Healthcare	Abt
Supplier	ABC Consulting	1288	Supremo US Business Unit	ABC Supremo US	ABC Supremo US	Abt
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Norway	ABC Norway	Abt
Supplier	ABC Consulting	1288	Sweden Business Unit	ABC Sweden	ABC Sweden	Abt
Supplier	ABC Consulting	1288	US1 Business Unit	ABC US1	ABC US1	Abt

Edit - Refresh - Print - Export - Copy

Child report will open with details

**XXAA Master-Child Dashboard Reports**

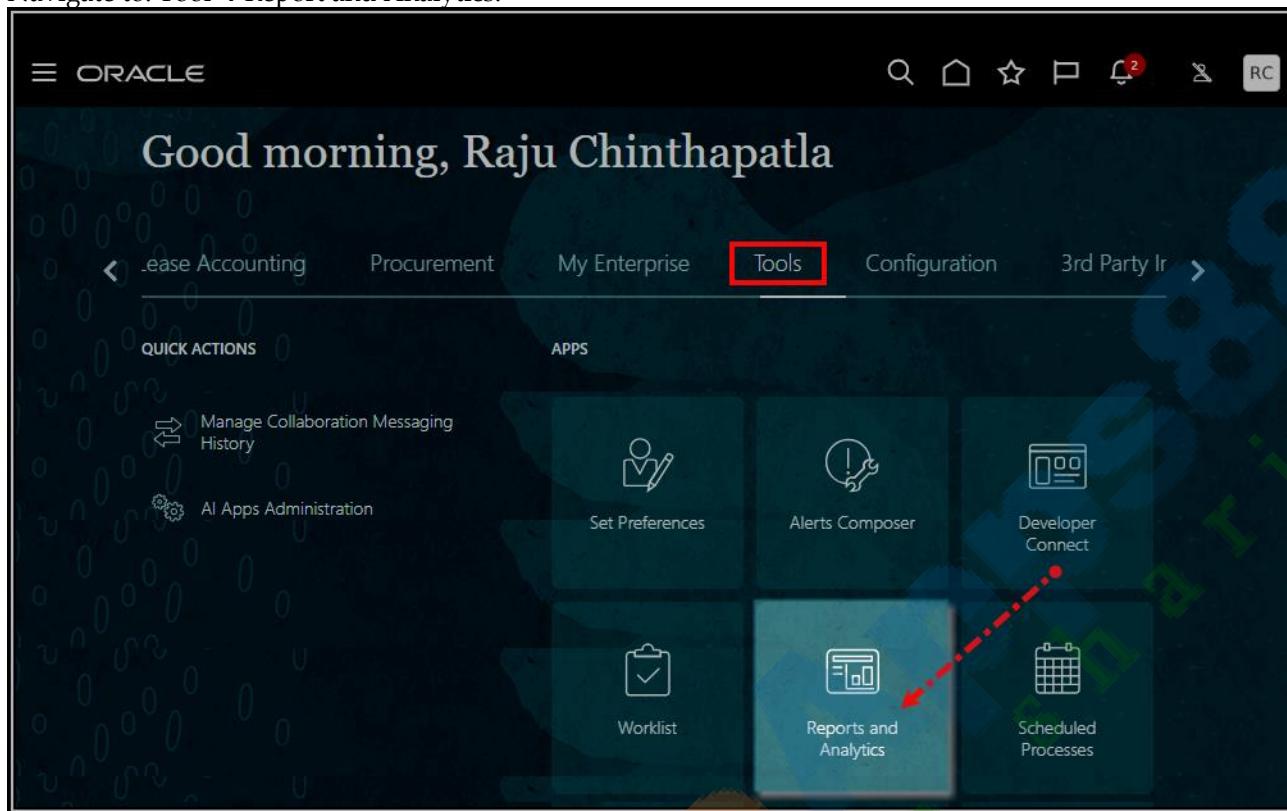
**XXAA Invoice Details Analysis Report**

BU Name	Supplier Name	Supp Num	Site	Invoice Number	Invoice Date	Instal Numt
Supremo US Business Unit	ABC Consulting	1288	ABC Supremo US	SUP111	2/16/20	
Supremo US Business Unit	ABC Consulting	1288	ABC Supremo US	SUP300	6/16/21	
Supremo US Business Unit	ABC Consulting	1288	ABC Supremo US	SUP301	6/17/21	
Supremo US Business Unit	ABC Consulting	1288	ABC Supremo US	SUP314	7/13/21	

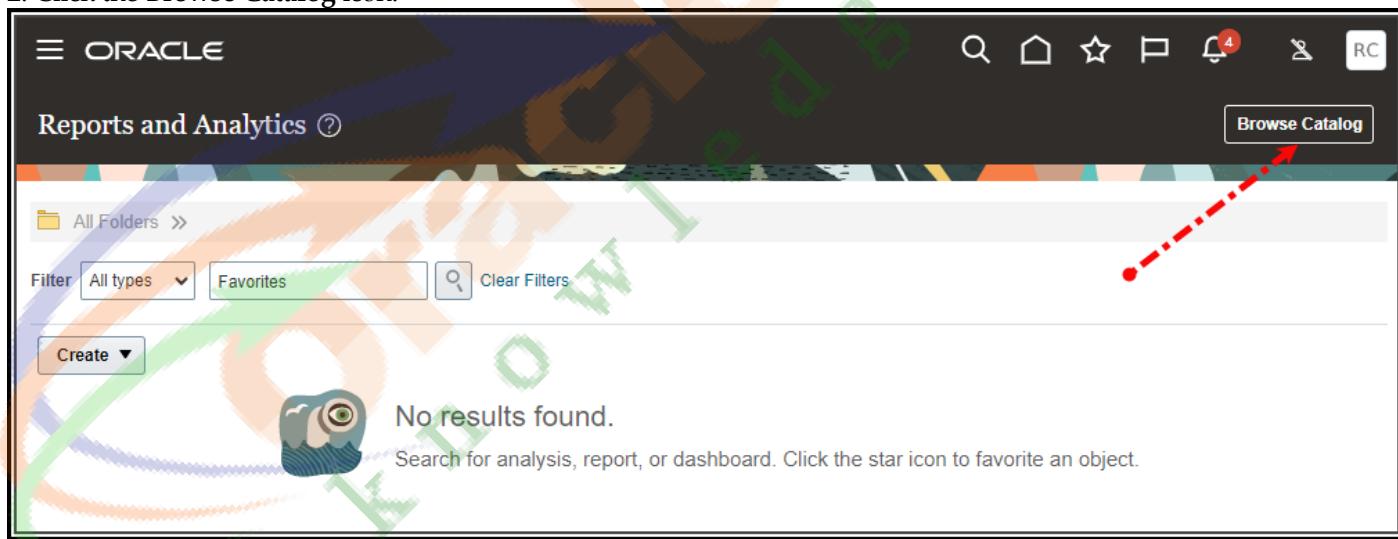
Return - Edit - Refresh - Print - Export - Create Bookmark Link - Copy

## 10. Creating Analysis Report with Multiple Subject Areas

Navigate to: Tool → Report and Analytics.

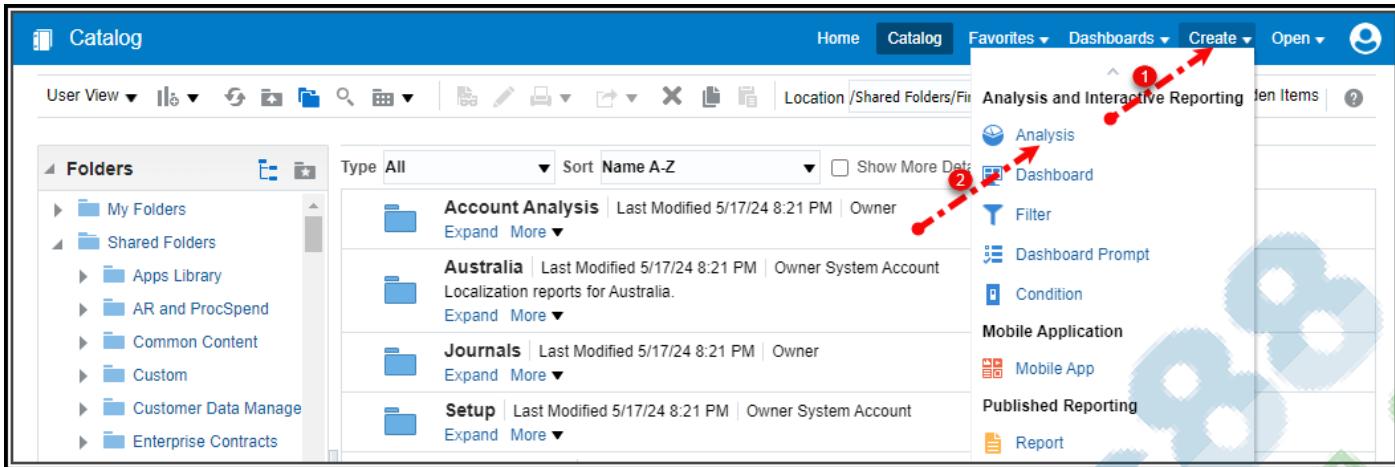


2. Click the **Browse Catalog** icon.

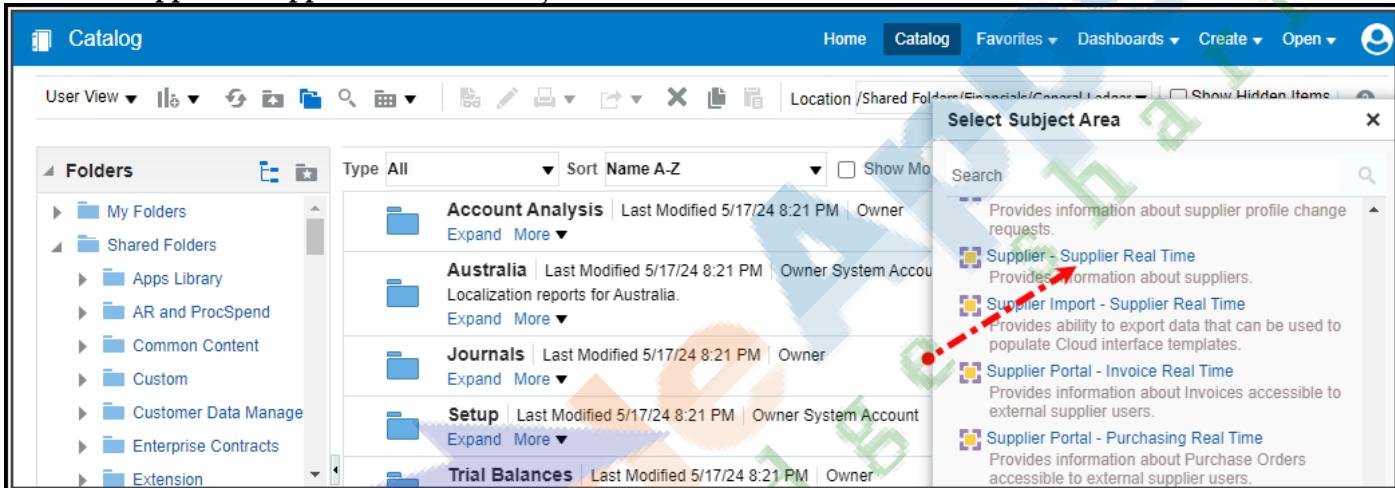


3. Click Create (New).

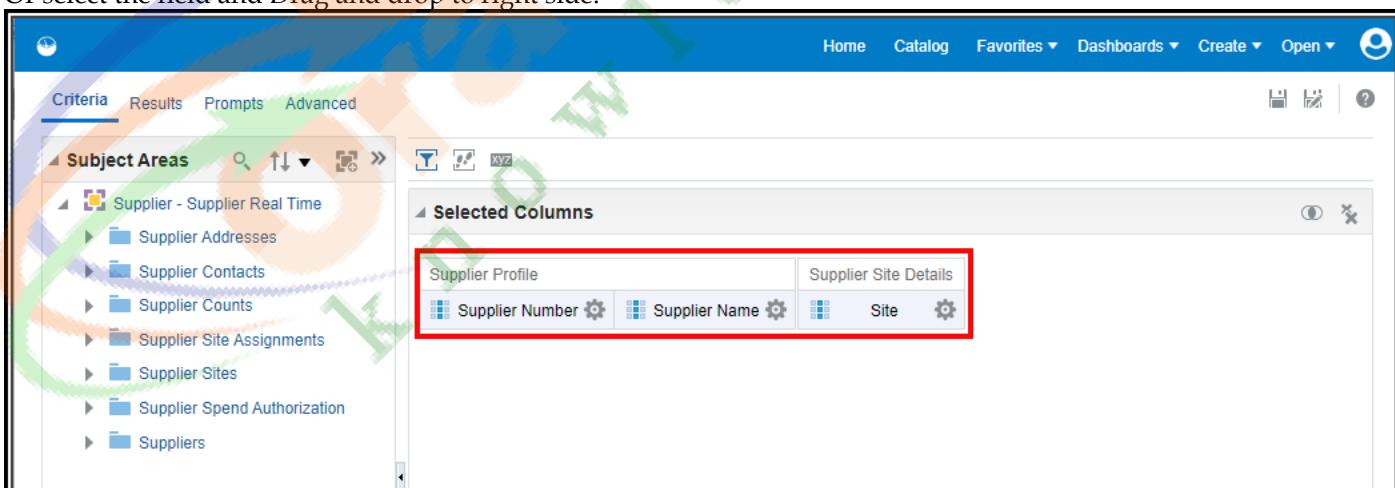
4. Select the **Analysis** option from the menu on the top-left of the page.



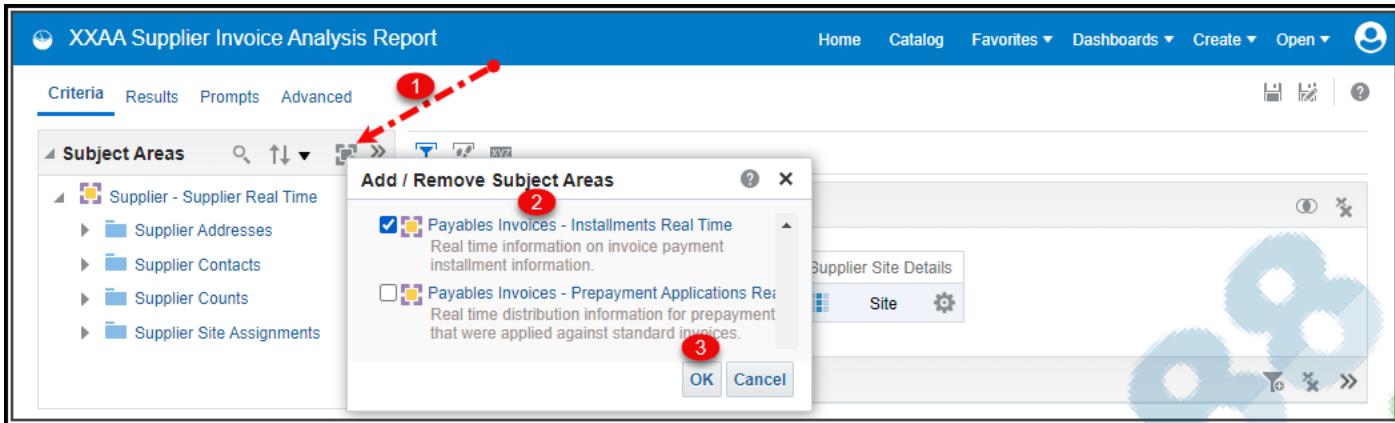
Select the Supplier - Supplier Real Time subject area.



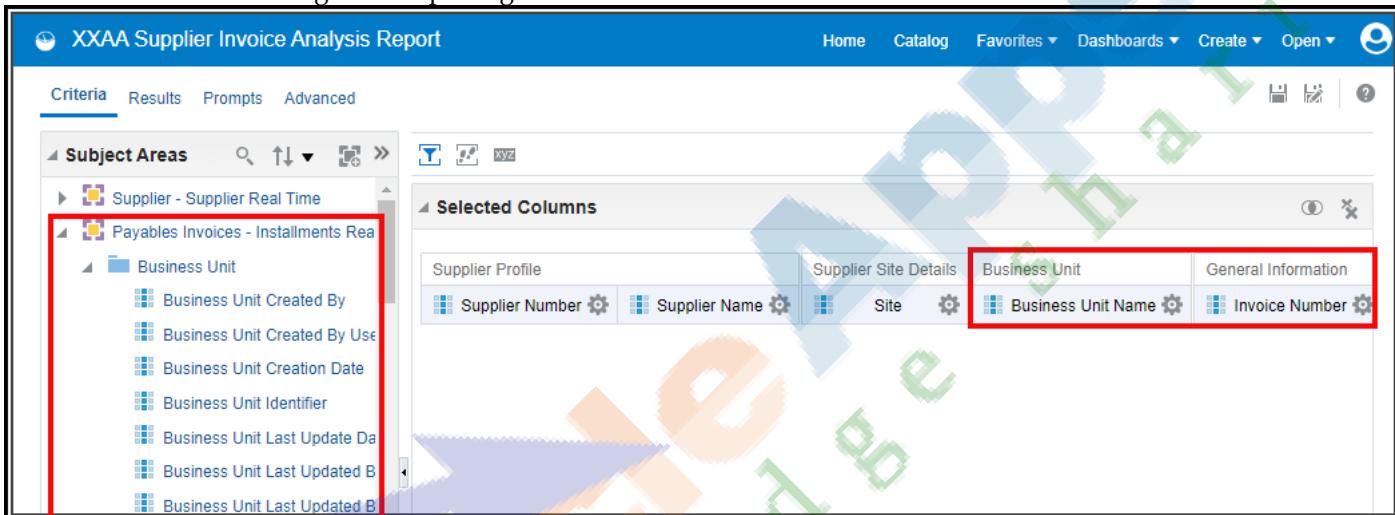
Expand the Subject area 1 Folders and select the field and Double-click on the field, it will populate on the right side Or select the field and Drag and drop to right side.



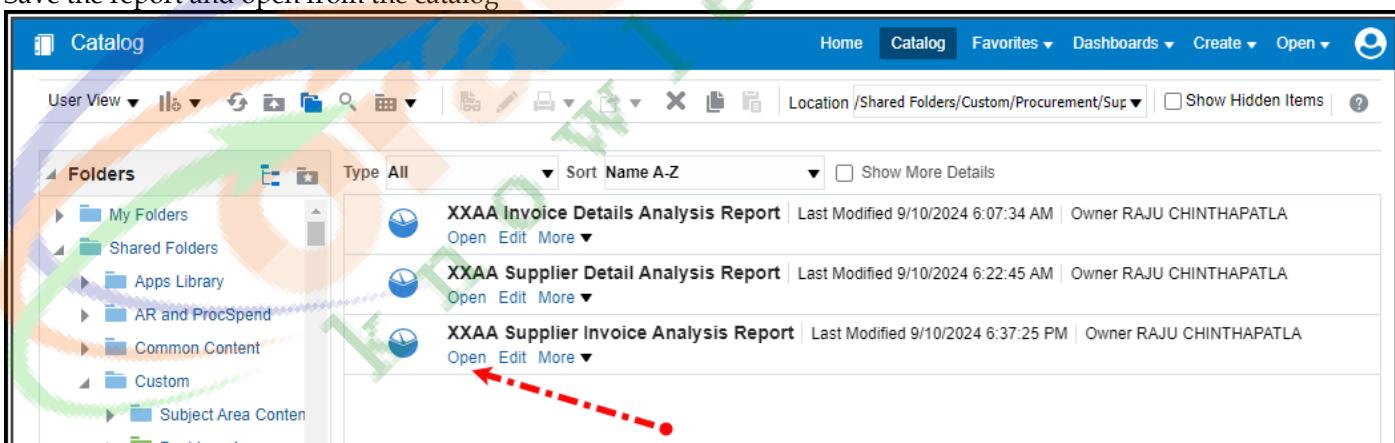
Click on the Add/ Remove subject areas and select the subject area



Expand the Subject area 2 Folders and select the field and Double-click on the field, it will populate on the right side  
Or select the field and Drag and drop to right side.



Save the report and open from the catalog



Report output will show the multiple subject areas fields

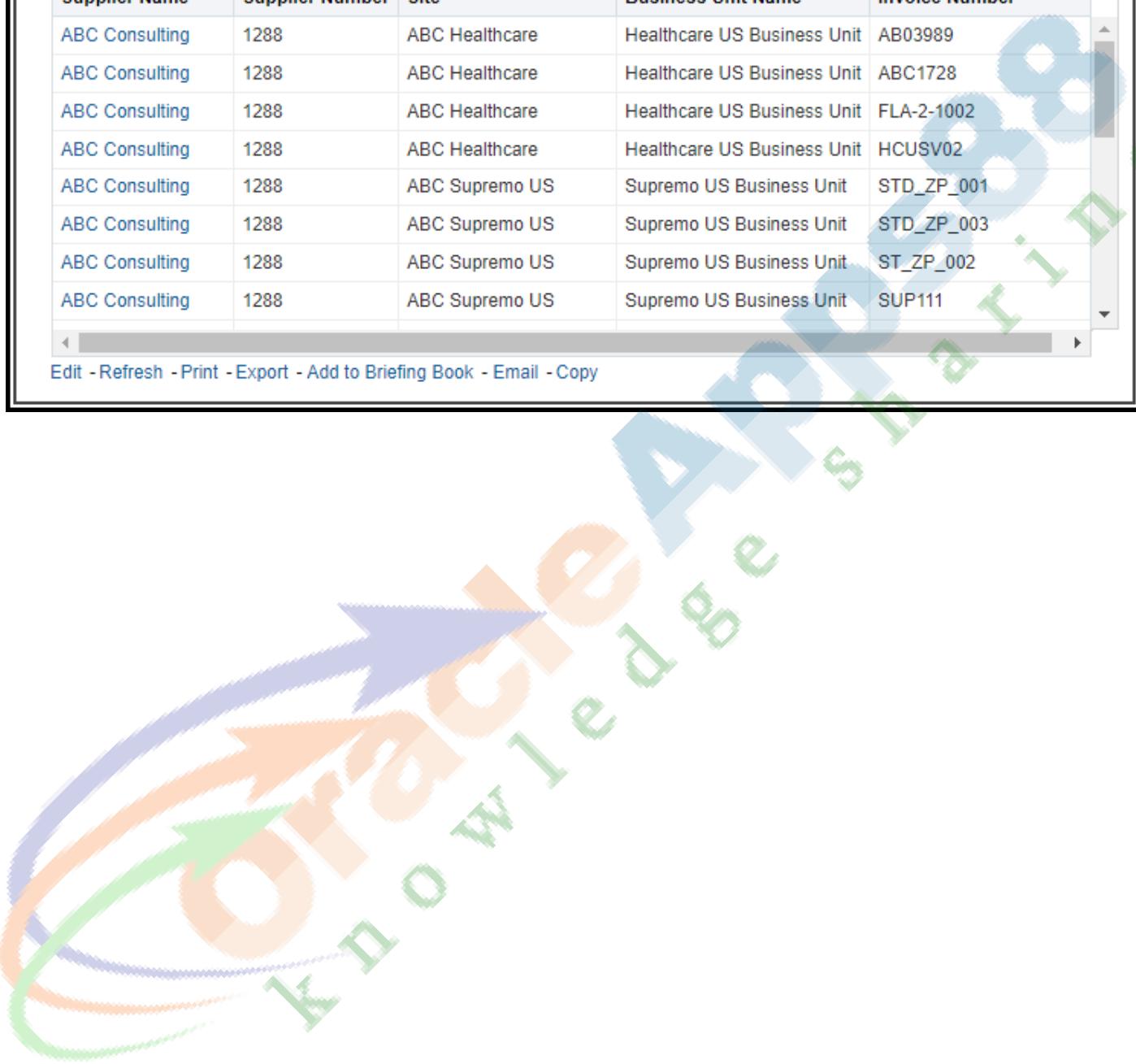
XXAA Supplier Invoice Analysis Report

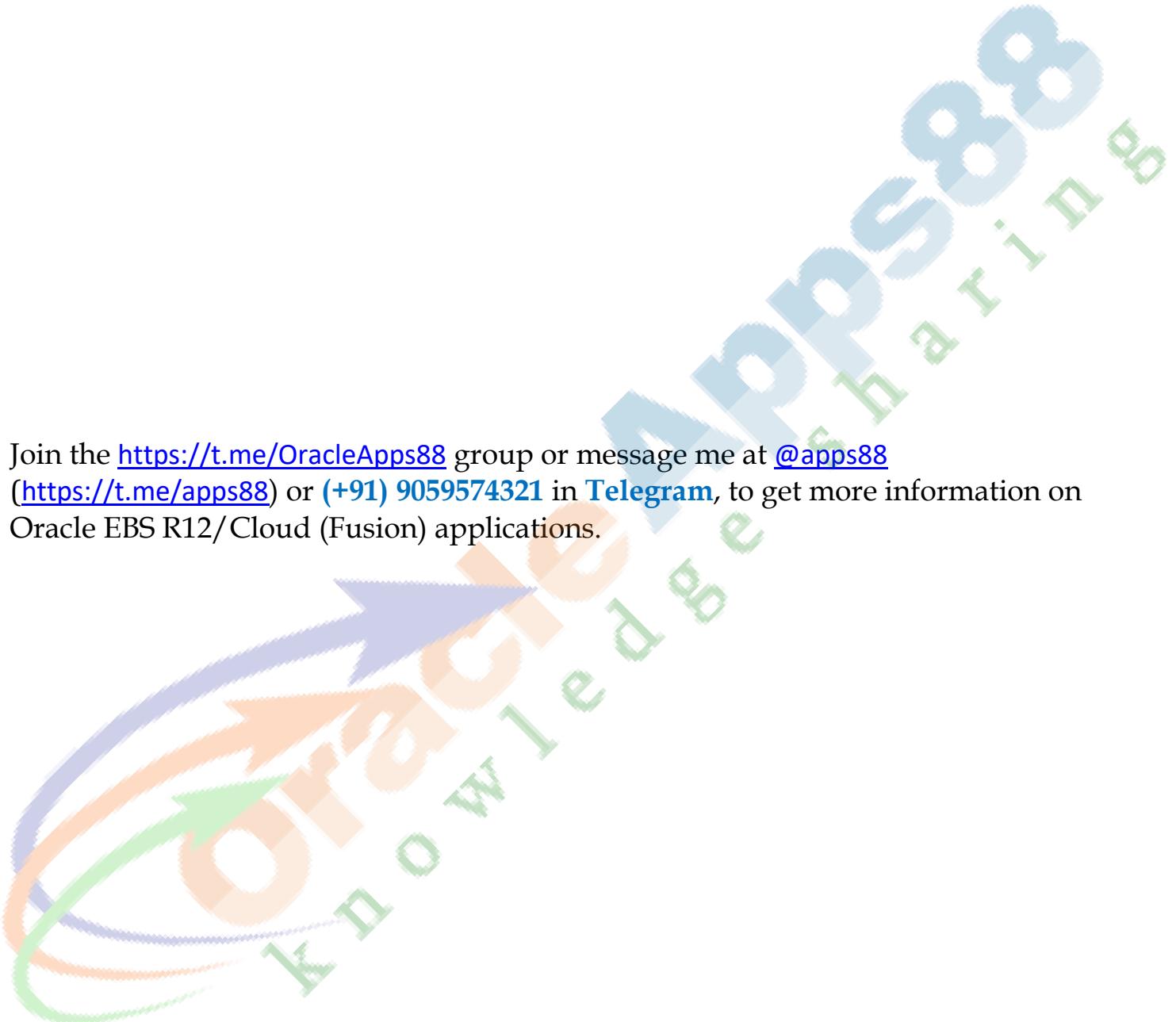
Home Catalog Fa

XXAA Supplier Invoice Analysis Report

Supplier Name	Supplier Number	Site	Business Unit Name	Invoice Number
ABC Consulting	1288	ABC Healthcare	Healthcare US Business Unit	AB03989
ABC Consulting	1288	ABC Healthcare	Healthcare US Business Unit	ABC1728
ABC Consulting	1288	ABC Healthcare	Healthcare US Business Unit	FLA-2-1002
ABC Consulting	1288	ABC Healthcare	Healthcare US Business Unit	HCUSV02
ABC Consulting	1288	ABC Supremo US	Supremo US Business Unit	STD_ZP_001
ABC Consulting	1288	ABC Supremo US	Supremo US Business Unit	STD_ZP_003
ABC Consulting	1288	ABC Supremo US	Supremo US Business Unit	ST_ZP_002
ABC Consulting	1288	ABC Supremo US	Supremo US Business Unit	SUP111

Edit - Refresh - Print - Export - Add to Briefing Book - Email - Copy





Join the <https://t.me/OracleApps88> group or message me at [@apps88](https://t.me/apps88) (<https://t.me/apps88>) or (+91) 9059574321 in **Telegram**, to get more information on Oracle EBS R12/Cloud (Fusion) applications.