

# Oracle Fusion Cloud HCM

---

## **Administering Analytics and Reports for HCM**

25A



Oracle Fusion Cloud HCM  
Administering Analytics and Reports for HCM

25A

G17950-01

*Copyright* © 2011, 2025, Oracle and/or its affiliates.

Author: Gita Sitaraman

# Contents

<b>Get Help</b>	<b>i</b>
<hr/>	
<b>1 Overview</b>	<b>1</b>
About This Guide	1
Overview of Transactional Business Intelligence	1
More About Oracle Transactional Business Intelligence Components	3
View Analytics, Reports, and Dashboards	4
HCM Subject Areas for Transactional Business Intelligence	6
<b>2 Setup and Management</b>	<b>9</b>
Setting Up Currency	9
Mapping to Work Areas	13
Set Up Reports as Scheduled Processes	15
Configuring Deep Links	19
Manage Permissions	22
<b>3 Flexfields</b>	<b>29</b>
Overview of Flexfield Use in Analyses	29
Configure Key Flexfields for Transactional Business Intelligence	29
Configure Descriptive Flexfields for Transactional Business Intelligence	34
Configure Extensible Flexfields for Transactional Business Intelligence	36
Import Changes to Flexfields Automatically	37
Disable Flexfields as BI-Enabled	39
Dimensions Supported by Descriptive Flexfields	43
<b>4 Analyses, Reports, and Dashboards Modification</b>	<b>53</b>
Overview of Creation and Administration of HCM Analytics and Reports	53
Analyses and Dashboards	53
Analytics Modification	57
Reports Modification	66


---

<b>5</b>	<b>Analytics and Reports Management</b>	<b>83</b>
	Managing Folders	83
	Manage Catalog Permission	84
	Scheduling Analytics and Reports	91
	Adding Analyses to Application Pages	97
<b>6</b>	<b>Maintenance and Migration</b>	<b>99</b>
	How to Tune Performance for Reports	99
	Review SQL Statements Used in Analyses	99
	Localize Catalog Captions	100
	Archive and Move Analytics	101
	Row Limits in Analyses	102
<b>7</b>	<b>Infolets</b>	<b>103</b>
	Overview of Infolets	103
	Personalize Infolets	104
	Configure Infolets	105
	FAQs for Infolets	109

# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Some application pages have help icons  to give you access to contextual help. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons. If the page has contextual help, help icons will appear.

## Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

## Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

## Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 1 Overview

## About This Guide

If you administer or work with business intelligence (BI) in Oracle Applications Cloud, this guide is for you. It provides an overview of Oracle Transactional Business Intelligence and covers common BI features in your application.

For example, you can create analyses in the Reports and Analytics work area, personalize the infolets on your home page, or configure flexfields for use in analytics.

## Overview of Transactional Business Intelligence

You use Oracle Transactional Business Intelligence (OTBI) to analyze your business and take action with embedded and ad hoc analysis of your transactional data.

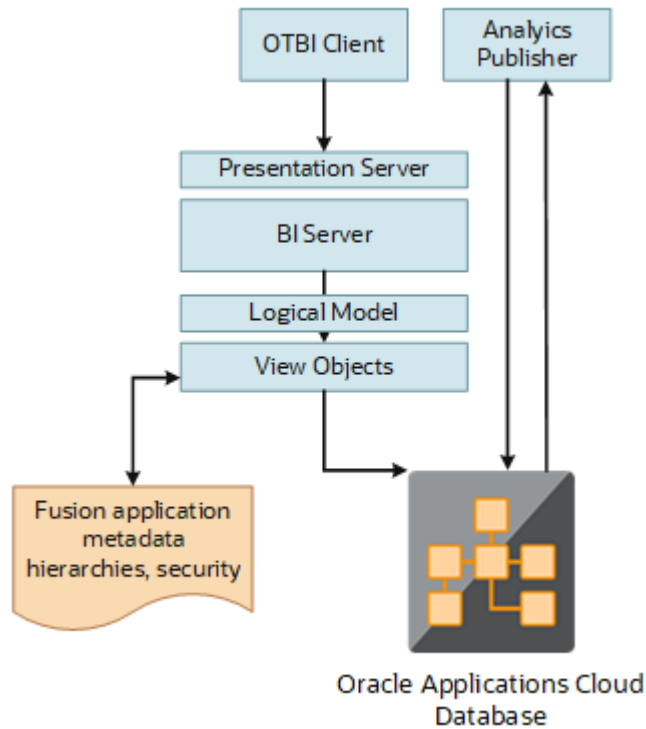
Key metrics and attributes of your business and organization are organized into subject areas of data you use as building blocks to answer your business questions.

- Use embedded analyses and reports to gain insights and report on key business metrics
- Build ad hoc analyses, reports, and dashboards.
- Create catalog folders and define who has access to what in the catalog.
- Organize your analytics in dashboards and embed them in your work areas.

## Architecture

OTBI integrates with Application Development Framework (ADF) to run your real-time analysis of your business subject areas.

The BI Server creates physical queries based on metadata mappings between the subject areas you work with in your analysis and ADF view objects and their underlying database tables. The Presentation Server compiles and formats the results in the client or as embedded analytics.



Here's the OTBI architecture.

## BI Objects and Tools

Here are some of the components and the objects they support.

Catalog Object	Description	Component or Tool
Analysis	Analyses are a selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.	Analytics Answers
Dashboard	Dashboards organize analytical content and catalog objects, and present them in a meaningful way.	Dashboard Builder
Dashboard Prompt	Dashboard prompts allow users to filter dashboard content by selecting from provided values.	Analytics Answers and Dashboard Builder
Filter	Filters limit the results that are displayed when an analysis is run.	Analytics Publisher
Agent	Agents deliver scheduled analytics and other content and notifications.	Delivers
Report	Reports present data in pixel-perfect printable format for distribution.	Analytics Publisher



Catalog Object	Description	Component or Tool
Data Model	Data models define the data source for reports.	Analytics Publisher
Subtemplate	Subtemplates are reusable formatting definitions for reports.	RTF or XSL editor

**Note:** You can't change privileges for the components, for example by changing which roles are assigned to access Dashboards or Analytics Publisher. Any changes made to privileges in the Administration Manage Privileges page aren't preserved during any upgrade.

The catalog stores the objects in a folder structure of individual files, organized hierarchically by product family.

- Shared folders (parent)
- Product family, for example, Financials
- Product, for example, Payables
- Report groups, for example, Invoices
- Dashboard reports
- Data models
- Report components
- Analytics Publisher reports
- Prompts

Some Oracle Transactional Business Intelligence components aren't available in Oracle Applications Cloud:

- BI Server: Processes user requests and queries in underlying data sources.
- Catalog Manager: Manages catalog and objects.
- Administration Tool: Manages metadata repository that defines the logical structure and physical data sources for analytic subject areas.

#### Related Topics

- [More About Oracle Transactional Business Intelligence Components](#)

## More About Oracle Transactional Business Intelligence Components

If you want to know more about Oracle Transactional Business Intelligence components, here's what we have.

## Oracle Transactional Business Intelligence

Here's the information about the parts of Oracle Transactional Business Intelligence (OTBI) that support analysis against your transactional data.

- Create and work with analyses, dashboards, and advanced analytical content, including dashboard prompts, conditions, actions, and key performance indicators.

*Creating Analyses and Dashboards in Oracle Transactional Business Intelligence*

- Administer analyses, dashboards, and other content.

*Administering Oracle Transactional Business Intelligence*

## Oracle Analytics Publisher

Analytics Publisher is the part of OTBI you use for reports.

- Run and view reports.

*Using Oracle Analytics Publisher in Oracle Transactional Business Intelligence*

- Create and edit reports, data models, layouts, templates, subtemplates.

*Designing Pixel-Perfect Reports in Oracle Transactional Business Intelligence*

- Administer Analytics Publisher, set up data sources and delivery destinations, manage security, and move catalog objects.

*Administering Oracle Analytics Publisher in Oracle Transactional Business Intelligence*

## View Analytics, Reports, and Dashboards



There are different ways to view and work with your analytics and reports. You can view analyses, dashboards, and reports in the course of your work, on your usual pages and infolets. Or you can find them in the business intelligence catalog with the Reports and Analytics work area and the Reports and Analytics panel tab.

## View Analytics in Infolets

Use your favorite infolet pages to find analytics.

1. Use the page controls and Previous and Next icons to explore infolet pages in the home page, where they may appear in infolets with summaries and aggregations or performance metrics. You may also find infolets in some work areas.
2. Click an infolet to open a detailed analysis. So for example, if an infolet has transactions summed to a total, click it to view details of the underlying transactions.
3. Click **Done**.

## View Objects in Familiar Work Areas and Pages

Use analyses, dashboards, and reports available in your usual pages and work areas.

1. Explore your pages. Some may include analysis and report links or embedded objects, sometimes in tabs or panel tabs.
2. Some work areas have a Reports and Analytics panel tab, where you explore catalog folders for relevant analyses and reports for the work area. And if you have permission, you can map more objects to the work area if they're appropriate.
  - a. Open the panel tab.
  - b. Expand the Shared Reports and Analytics folder and explore the available content.
  - c. Click the link for any object and see its type to determine whether it's an analysis, a report, or a dashboard.
  - d. Click **View** to open the object.

## View Objects in the Reports and Analytics Work Area

Use the Reports and Analytics work area to search or browse the catalog and view any analysis, dashboard, or report you have access to. It opens at the highest level of the catalog's folder hierarchy with all objects you have marked as favorites.

Here are some things you can do in the Reports and Analytics work area.

1. Click **Navigator > Tools > Reports and Analytics**.
2. Filter and search for objects:
  - a. From the Filter list, select what you want to find.
  - b. To view objects you have marked as favorites, select **Favorites** in the list. Or select **Recent Items** to view objects you recently worked with, or a recent search to run it again. Enter a name or part of a name and click the **Search** icon.
  - c. In the search results, use the icons to identify what the objects are.
  - d. Click the name of an object to open it, or click **More** and select an action.
3. In the breadcrumbs, browse the catalog folders for analytics and reports. Click any **Hierarchical Selector** icon to select a different node for the next level in the hierarchy.
4. Mark objects as favorites.
  - o Select **Favorites** in the Saved Searches to display your favorite objects.
  - o Click the **Add Favorites** icon for an object to mark it as a favorite.
  - o Click the **Remove from Favorites** icon to remove an object from your favorites.
5. Create and edit analyses and reports.
  - a. Click **Create** and select **Report** or **Analysis**.
  - b. Use wizards to create your analysis or report.
6. Click the **Browse Catalog** button (or click the **More** icon for a specific report, dashboard, or analysis) to use more features.

**Note:** If you don't see an analysis in the work area, browse the catalog for it. In the Catalog, select Show Hidden Items to display any hidden analyses.

## View Analyses

An analysis queries against your company's data and answers business questions with visualizations, such as charts and tables. They may appear on your pages, or as parts of a dashboard.

1. From the catalog folders or search results, open an analysis to view.
2. Click **Refresh** to rerun the analysis and refresh its data.
3. Click **Print** and select either **Printable PDF** or **Printable HTML** to open a printable version.
4. Click **Export** to get analysis data in various formats, for example PDF, Excel, PowerPoint, comma-separated value (CSV), and XML.

**Note:** When you export data in a CSV format, dates are exported in raw format and converted to UTC time zone.

## View Grouped Analyses in Dashboards

Some analyses are grouped in dashboards to give you meaningful related information. A dashboard contains pages of analyses, prompts that filter information, and other objects.

1. From the catalog folders or search results, open a dashboard to view.
2. Select values for any dashboard prompts to filter the dashboard.
3. Click **Apply** to refine the results of all of the analyses in the dashboard.

## View Reports

Reports show data in a predefined format that's optimized for printing.

1. From the catalog folders or search results, open a report.
2. Click the **View Report** icon if you want a different format.
  - Choose **HTML** or **PDF** to display the report in a format for printing. Because it's optimized for printing, PDF often provides the best results.
  - You can also export the report as RTF for editing in a word processor, or as Excel or PowerPoint.
3. From the catalog folders or search results, you can also do these tasks:
  - Click **Edit** to edit the report properties, layout, and data model.
  - Click **Report History** to see details about past submissions of the report.
  - Click **Schedule** to schedule the report to be run.

# HCM Subject Areas for Transactional Business Intelligence

To create a real-time analysis using Oracle Transactional Business Intelligence, begin by selecting a subject area. Then, select columns of information to include in the analysis.

Information in OTBI is grouped into subject areas. Subject areas are based around a business object or fact.

For example, to create an analysis of salary information, you begin by selecting a Compensation subject area.

Transactional Business Intelligence includes subject areas for:

- Absences
- Benefits
- Compensation
- Environment Health and Safety
- Goals
- Payroll
- Performance
- Profiles
- Succession
- Talent review
- Workforce management

Subject areas for Transactional Business Intelligence always include the suffix, Real Time.

## Fact Folders and Dimension Folders

The information in a subject area is centered on a fact and that fact is joined to several dimensions. The subject area as a whole enables you to report on that fact, so, subject areas are named after their facts. Each subject area has one fact folder and a number of dimension folders. Fact folders contain attributes that can be measured, meaning that they're numeric values like headcount and salary. A special folder, called a degenerate dimension, is also associated with the fact folder. Each dimension folder is joined to the fact folder within a subject area. Fact folders are usually below the list of folders and are usually named after the subject area.

Some folders appear in more than one subject area, such as Grade, Department, and Job. These are referred to as common folders or common dimensions.

Each fact has a different level of granularity. For example:

- Worker Assignment has one row for every assignment.
- Worker Assignment Event has one row for each assignment event, such as hire and transfer, which means there are multiple rows for each assignment.
- Absence has one row for each absence

## Data Security in Subject Areas

Data security is usually applied to the fact in a subject area. The security that is applied is exactly the same as that within the transactional system. Hence, a manager will only see the headcount or FTE for the workers that their Fusion security will allow them to see. Most dimensions are unsecured, the exception being the Assignment Manager dimension (or hierarchy). This dimension will only allow a user to report on themselves and anyone below them in the line manager assignment hierarchy.

## Reporting Across Subject Areas

You can report from two or more facts (each fact is in a different subject area) if the dimensions used in the report are common to both subject areas. Such dimensions are known as conformed dimensions. It is not possible to report

across subject areas if even one dimension is unique to only one of the subject areas (a local dimension). Such reports will result in an ODBC error. Most of the subject areas will join to other subject areas via conformed dimensions. The exception is the Person subject area that is not designed to join to any other subject area.

Example: You would like to report on the headcount and total salary for each of your departments. Salary and headcount are two different facts and therefore exist in two different subject areas. Therefore it is necessary to report across those two subject areas. Department is common to both subject areas and so this report will run successfully. If Salary Basis is added to the report, then it will fail because there is no way to join headcount to salary basis. Salary basis is a local dimension in the salary subject area.

If you have to create a report from two subject areas, you need to add a metric from each of the subject areas.

Example: "Workforce Management - Worker Assignment Real Time"."Worker Assignment"."Head Count" and "Workforce Management - Absence Real Time"."Assignment Absences"."# Of Absences". Head Count and # Of Absences are the metrics used here.

To find the list of reports that use a particular subject area, you can use the **OTBI Usage Real Time** subject area. This subject area has the reports and the report query text that you could filter.

## Folders and Flattened Hierarchies

Some folders contain flattened hierarchies. For example, the manager and department hierarchies are flattened, which means that the transactional system contains:

- One record that indicates that John is Claire's manager.
- Another record that indicates that Claire is James's manager.

The hierarchy has both a record containing John - Claire - James, and another one with Claire - James. If John signs in, he uses the former, if Claire signs in, she uses the latter record.

For detailed information about HCM subject areas, see Oracle Human Capital Management Cloud Subject Areas for Transactional Business Intelligence in HCM.

## Reporting Across Subject Areas in BI Publisher

You can report subject areas in BI Publisher by creating joins between subject areas. You will need the BI Administration role in order to create a BI Publisher Data Model. There can be two types of join:

Element Level: This is an equal join linking columns. Allows only return data that exists in both sides of the join.

Group Level: Allows outer joins - rows that exist in one side of the join will be reported even if they don't join to rows on the other side.

To create a simple analysis to view the performance document questionnaire or any survey responses answers document, you can select a measure related to that section. This gives OTBI an ability to form a query appropriate to section reporting.

Example: "Workforce Performance - Performance Rating Real Time".."- Performance Rating"."Average Section Rating". You can hide the newly added attribute using Answer's column properties.

## 2 Setup and Management

### Setting Up Currency

#### Currency and Exchange Rate Settings for Analytics

You can choose how currency is shown in your application. If you're running analytics on your application data, you can specify currency and exchange rate details in BI.

Currency can be set in different regional currency types, depending on where you do business and what currency types you want to see.

There are three ways you set up currency:

- **User Currency** - Set by the business user in Regional settings. This setting applies to the entire application interface for that user only. The available currency options are set by your application administrator.
- **Analytics Currency** - Set by the business user in BI in My Account settings in the Reports area. The setting applies to that user only and is only relevant for analyses.
- **Corporate Currency** - Set by the application administrator. This setting applies to all users in that company.

**Note:** The time zone preferences that you set in your fuse simplified user interface are inherited and used as the time zone setting for your existing and new analytics.

#### Set General User Currency

User currency settings determine the currency used as the default for what you see in your application. User currency applies to your entire interface for your signed-in session.

1. Navigate to **Tools, Set Preferences**.
2. Select **General Preferences > Regional**.
3. Select the preferred currency to be used. Available currencies include those set up for your company by your application administrator.

#### Set Analytics Currency

The analytics currency settings determine the currency type that's displayed in all your analytics. It also determines how and when your currency conversion rates are calculated.

1. Click **Navigator Tools Reports and Analytics**.
2. Click **Browse Catalog**.
3. Click **My Profile** and select **My Account**.
4. In the Preference tab, select your choice in **Currency**.

This shows the currency display options for users:

Currency Display Type	Description
Entered Currency	Currency used on a transaction.
<Application> Currency	Currency set up in each respective Cloud application as the common Corporate currency used company-wide.
User Preferred Currency using Simple Currency Management	Conversion to User Preferred Currency is performed at the time you run the report, and is calculated from the Corporate currency based on the last time the record was updated and saved or closed.
User Preferred Currency using Advanced Currency Management	Conversion to User Preferred Currency happens on the date you run the report, and uses the currency indicated on the record.

## Set a Default Currency Conversion Option for All Users

By default your currency is converted to the corporate currency with a method called "User Preferred Currency Using Simple Currency Management".

The simple "User Preferred Currency Using Simple Currency Management" setting provides the best run-time performance because when you run a report, the application doesn't have to look up the rate for each transaction. The currency is converted to your corporate currency at that day's rate when you update and save a record. Otherwise, the application cycles through each record at run-time and converts the currency one record at a time to the exchange rate in effect at the time the report is run. For more information see, [How User Preferred Currency Exchange Works](#).

But you can also standardize the setting for all system users, by setting the default preference to another option, such as <myapplication> Currency or User Preferred Currency Using Advanced Currency Management.

To change the default currency setting for all users, administrators need to add a profile option and a corresponding value. Note that when administrators change the default currency setting for users in their organization, individual users can still override that setting and select their preferred currency in **My Account**.

The following table shows the profile option code parameters to override the default currency setting.

Profile Code	Profile Value Description
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	<myapplication>Currency - Defaults to Application Currency.
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	User Preferred Currency 1 - Defaults to User Preferred Currency Simple Currency Management.
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	User Preferred Currency 2 - Defaults to User Preferred Currency Advanced Currency Management.



## Set a Global Currency Conversion Profile

Set a global currency conversion method for all your users by creating a currency profile. Only administrators can create currency profiles.

1. In Setup and Maintenance, go to **Manage Administrator Profile Values**.
2. Enter the following values:
  - o **Profile Option Code** : BI\_DEFAULT\_CURRENCY\_CONVERSION\_METHOD
  - o **Profile Display Name** : BI Default Currency Conversion Method
  - o Application
  - o Module
  - o **Start Date** : Provide previous day's date to proceed to next step to define values.
3. Click **Save** and **Close**.
4. In the Manage Profile Options dialog box, you see your new profile. Check the Enabled box for Site.
5. Click **Save** and **Close**.

### Related Topics

- [How do I update existing setup data?](#)

## Define Currency Profile Values

After you create your currency profile, the last step is to define the profile value. This step defines which currency management option is assigned to that profile.

1. In the Setup and Maintenance work area, use **Manage Administrator Profile Values**.
2. In Profile Option Code search for your profile: BI\_DEFAULT\_CURRENCY\_CONVERSION\_METHOD.
3. In Manage Administrator Profile Values, Click **Add** (+ icon).
4. Select **Site** as the Profile level.
5. Enter "User Preferred Currency 2" in Profile Value.
6. Click **Save and Close**.

## How User Preferred Currency Exchange Works

The simple and advanced user-preferred currency choices determine how and when your currency exchange rates are calculated. For both simple and advanced currency management, when you save or close a report, the exchange rate is set at that time.

The option you choose impacts how quickly your reports are generated at run time. Each case includes trade-offs, as detailed in the examples.

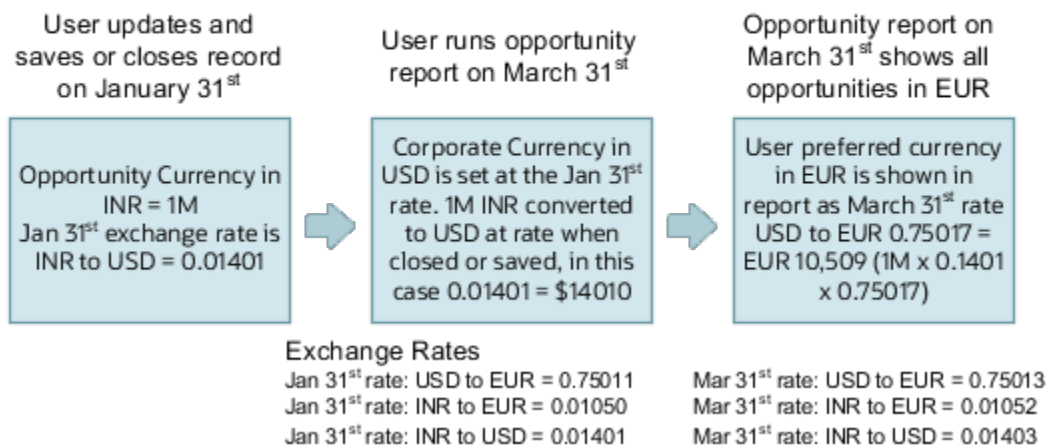
## User Preferred Currency using Simple Currency Management

The advantage of this option is performance - the application doesn't have to look up the rate for each transaction because when you close or save a record, the application converts it to your corporate currency at that day's rate. When you run the opportunity report, the application multiplies that value by your preferred currency exchange rate for the date you run the report. This eliminates the need for the application to cycle through each record, and calculate the corresponding exchange rate to your preferred exchange rate at the time that record was closed or last saved. It simply takes the value on record for the original transaction exchange to corporate currency, and multiplies it by your preferred currency exchange rate at the time you run the report.

As an example of user preferred currency using simple currency management, a user updates and saves or closes an opportunity record with associated revenue of one million Indian Rupees on January 31st with an exchange rate of 0.01401 Rupees to one US Dollar. The user then runs an opportunity report in US Dollars on March 31st. In the report, the US Dollar Corporate Currency is set at the January 31st rate it was saved at, in this case reporting as \$14,010, or one million multiplied by 0.01401. Finally, an opportunity report on March 31st in Euros uses the March 31st conversion rate for US Dollars to Euros of 0.75017 to convert the recorded US Dollar amount into Euros, in this example one million multiplied by 0.01401, which is the January 31st Rupee to US Dollar exchange rate, multiplied by 0.75013, which is the March 31st rate for Euros. This requires less processing, because the January 31st Rupee to US Dollar exchange rate, while not exact on March 31st, is used as the basis for the calculation of the March 31st opportunity revenue conversion to Euros at the later exchange rate.

The following figure describes an example of user preferred currency using simple currency management.

### Example of User Preferred Currency using Simple Currency Management:



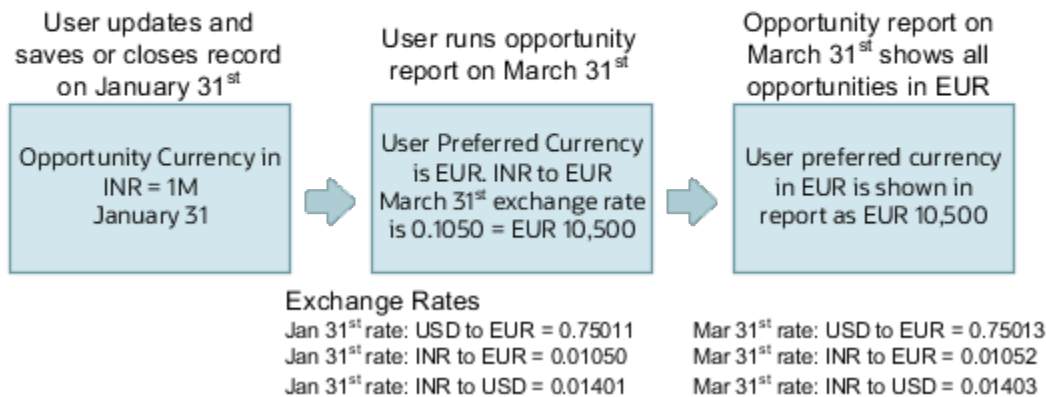
## User Preferred Currency using Advanced Currency Management

This option provides a more precise exchange rate, since it goes through each record to determine the rate on the date the record was updated or closed. The downside of this option is performance. Your reports will take longer to run. The application has to cycle through each record and match currency exchange rates to the date the record was closed or updated and saved.

As an example of user preferred currency using advanced currency management, a user updates and saves or closes an opportunity record with associated revenue of one million Indian Rupees on January 31st, when an exchange rate of 0.01050 Rupees to one Euro applies. The user then runs an opportunity report on March 31st. In the report, the User Preferred Currency of Euros is applied, using the January 31st Rupee to Euro rate of 0.01050, requiring calculation during report processing to resolve the opportunity to 10,500 Euros. Note that running the opportunity report on March 31st doesn't change the calculation and the close date of January 31st is used.

The following figure describes an example of user preferred currency using advanced currency management.

Example of User Preferred Currency  
using Advanced Currency Management:



## Why do I see amounts of zero in analyses?

Currency exchange rates might not be set up correctly. For example, you set EUR as your preferred currency in general preferences, and corporate currency is USD. Amounts are displayed in EUR after conversion from USD at the current exchange rate.

## Mapping to Work Areas

### Set Up the Reports and Analytics Panel Tab

The Reports and Analytics panel tab appears in many work areas, and shows analytics and reports related to the work areas. You map and unmap the objects for a specific work area from the business intelligence (BI) catalog.

Your mapping changes for a work area apply to all users who have access to it.

### Map and Remove Objects from Your Work Area

1. Expand the Reports and Analytics panel tab.
2. Click the **Edit Settings** icon.

You see all the analytics and reports that are currently mapped to your work area.

3. Click **Select and Add**.
4. Select the object in the catalog.
5. Click **OK**.
6. To remove any mapping, select the object and click **Remove**.
7. Click **Save**.

## Map and Remove Objects from Any Work Area

1. In the Setup and Maintenance work area, go to the **Map Reports to Work Areas** task.
2. Select the application of the work area you want to map to.
3. Select the work area.
4. Click **Search** and see all the reports that are currently mapped to that work area.
5. Click **Select and Add**.
6. Select the object in the catalog.
7. Click **OK**.
8. To remove any mapping, select the object and click **Remove**.

**Tip:** Click **Synchronize** to remove all mappings to any objects that are no longer in the catalog. You synchronize all work areas, not just the one you're mapping.

9. Click **Save**.

### Related Topics

- [Why can't I see analytics and reports when I edit settings for the Reports and Analytics panel tab?](#)
- [Why can't I see analytics and reports when mapping to work areas for the Reports and Analytics panel tab?](#)
- [Set Up Reports for Scheduling](#)
- [How do I update existing setup data?](#)

## Why can't I see analytics and reports when mapping to work areas for the Reports and Analytics panel tab?

Either no analytics and reports are mapped to the work area you select on the Map Reports to Work Areas page, or you don't have access to the mapped objects.

Similarly, when you're selecting an object to map, you can only see objects you have access to. Your administrator can grant access to the objects or let someone with access map them.

- Assign you roles with access to the objects you want to map.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to the objects.

## Why can't I see analytics and reports when I edit settings for the Reports and Analytics panel tab?

In the Edit Settings window, you might not see a currently mapped report because you don't have access to it.

Similarly, when you're selecting an object to map, you can only see objects you have access to. Your administrator can grant access to the objects or let someone with access map them.

- Assign you roles with access to the objects you want to map.

- Grant the Reports and Analytics Region Administration Duty to someone who already has access to the objects.

## Set Up Reports as Scheduled Processes

### Create Job Definitions to Run Reports as Scheduled Processes

Every job definition has a job type that reflects the executable for the job, such as Java or Oracle Analytics Publisher reports. You can only create job definitions that are based on Analytics Publisher reports.

When there's a job definition for an Analytics Publisher report, users can run the report as a scheduled process in the Scheduled Processes work area. Otherwise, they can open reports (which are set up to be run online) elsewhere, for example in the Reports and Analytics work area.

**CAUTION:** Make sure your user name doesn't contain any spaces. If you create a custom job definition using a user name that contains spaces, other users might get errors when they submit this custom job definition.

### Create Job Definitions

Here's how you create a job definition for an Analytics Publisher report:

- In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.  
**Note:** If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.
- On the Manage Enterprise Scheduler Job Definitions and Job Sets page, click the Manage Job Definitions tab.
- Click the **Create** icon.
- Fill in the Job Definition section.

Field or Check Box	What You Do
Display Name	Enter the name that users see and select to submit the scheduled process.
Name	Enter a name with only alphanumeric characters, for example, <b>AtkEssPrograms1</b> . It can't have spaces or any special characters.
Job Application Name	<p>Select the application to associate the job definition with. What you select depends on the task you're using.</p> <ul style="list-style-type: none"> <li>Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications: Select <b>CrmEss</b>.</li> <li>Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications: Select <b>FscmEss</b>.</li> <li>Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications task: Select <b>EarHcmEss</b>.</li> </ul>

Field or Check Box	What You Do
Enable submission from Enterprise Manager	Make sure you don't select this check box.
Job Type	Select <b>BIPJobType</b> . Don't select any other type.
Default Output Format	Select the output format users get by default when they submit the scheduled process.
Report ID	<p>Enter the path to the report in the BI catalog, starting with the folder within Shared Folders, for example: <b>Custom/&lt;Family Name&gt;/&lt;Product Name&gt;/&lt;Report File Name&gt;.xdo</b>.</p> <p>Make sure to include the <b>.xdo</b> file extension for the report definition.</p>
Enable submission from Scheduled Processes	Leave the check box selected.

5. In the Parameters subtab, you can define parameters that are available to users when they submit the scheduled process based on your job definition.
6. In the User Properties subtab, don't create or edit a user property unless you have the accurate information that's required to create or edit one. The **EXT\_PortletContainerWebModule** user property is automatically created.
7. Click **Save and Close**.

When you create a job definition, a privilege with the same name as the job definition is automatically created with a Run prefix. For example, for a job definition named MyProcess1, with display name My Process, the privilege code is RUN\_MYPROCESS1, with Run My Process as the name. Make sure to use the Security Console to assign this privilege to roles so that users who need to run the process can do so.

#### Related Topics

- [Define Parameters for Job Definitions](#)
- [How do I update existing setup data?](#)
- [Configure Offerings](#)
- [Manage List of Values Sources](#)
- [Edit Job Definitions](#)

## Define Parameters for Job Definitions

A parameter controls which records are included or how they are affected when a job runs. Job definitions can have one or more parameters or none at all.

You define parameters while creating or editing job definitions using the Manage Enterprise Scheduler Job Definitions and Job Sets page. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions or a product-specific functional area

- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

When users run the scheduled process for job definitions of type BIPJobType, the values they enter for the parameters determine the data to be included in the report. Also, the values are passed to the data model that the report is using.

The parameters that you define must be in the same order as parameters in the data model for the report. For example, the data model has parameters in this order:

- P\_START\_DATE
- P\_END\_DATE
- P\_CURRENCY

You create parameters as follows:

- Start Date
- End Date
- Currency

## Defining Parameters: Job Definitions

To define parameters while creating or editing job definitions:

1. On the Manage Job Definitions page, open the Parameters sub tab.
2. Click **Create**.
3. Enter the parameter prompt that users see when they submit the scheduled process.
4. Select a data type and configure how the parameter and the data entered are displayed, as described in this table.

Data Type	Fields
Boolean	<p>Select this if you want the parameter to be a check box.</p> <p>Select <b>True</b> or <b>False</b> to determine if the check box is selected or not.</p>
Date or time	<p>Select <b>Date and time</b> or <b>Date only</b> option.</p> <p>Select a value from the <b>Default Date Format</b>.</p> <p><b>Note:</b> Make sure the format you select here is the same as the format used for the job. If the job definition type is BIPJobType, select <b>yyyy-MM-dd</b>, and make sure the data model for the corresponding Oracle Analytics Publisher report is using the same date format.</p>
Number	<p>Select a <b>Number Format</b>.</p> <p>Select <b>Left</b> or <b>Right</b> for data alignment.</p>
String	<p>Select a <b>Page Element</b>.</p> <p>Select <b>Text box</b> if you want the user to provide a text.</p>

Data Type	Fields
	<p>Select <b>Choice list</b> if you want a list with limited options (maximum 10). If there are more than 500 values, users will get an error when they try to set the parameter as part of submitting the scheduled process.</p> <p>Select <b>List of values</b> if you want a list with unlimited options with a search facility.</p>

5. Select the **Read Only** check box if you don't want to enable users to set this parameter. When a parameter is set as read only, the user is required to provide a default value to be passed to the job definition.
6. If you select list of values or choice list page element, select a **List of Values Source** and an **Attribute**. Use the list of values sources from the Manage List of Values Sources tab. Don't define lists of values in the data model that the report is using.
7. From the list of available attributes, select the attributes you want to appear in the list and move them to the selected attributes section. These attributes determine the values that the user can see.
8. Define a **Default Value** for the parameter.
9. In the **Tooltip Text** field, provide additional information for the user to follow.
10. Select the **Required** check box if users must set this parameter to submit the scheduled process.
11. Select the **Do not Display** check box if users should not see this parameter while submitting the process.
12. Click **Save and Create Another** or **Save and Close**.

## Dependent Parameters

The attributes of some parameters depend on the attributes or values of certain other parameters. The attributes of a parameter would change if the value of its dependent parameter changes.

For example, you have three parameters, namely Country, State and, City. In this case, the value of the Country parameter would determine the values available in the State parameter. The values in the State parameter would determine the values available in the City parameter.

### Related Topics

- [Create Job Definitions to Run Reports as Scheduled Processes](#)
- [Define Dependent Parameters in Job Definitions](#)

## Set Up Reports for Scheduling

You can set up reports as scheduled processes so users can submit them from the Scheduled Processes and other work areas.

If you want users to also submit these scheduled processes from the Reports and Analytics work area and panel tab, then you need to configure properties for the corresponding reports.

## Enable a Report for Scheduling

1. In the Reports and Analytics work area or panel tab, edit the report in the business intelligence catalog.
2. Click **Properties**.
3. In the General tab in the Properties dialog box, enter the field values as shown in this table and then click **OK**.



Field	Value
Enterprise Scheduler Job Package Name	Enter the path for the job definition, for example: <code>/oracle/apps/ess/&lt;product family&gt;/&lt;product&gt;/&lt;business area&gt;/Jobs</code>
Enterprise Scheduler Job Definition Name	Enter the job definition name (not display name), for example: <code>ABCDEFGF</code>

#### Related Topics

- [Set Up the Reports and Analytics Panel Tab](#)
- [How You Access and Modify Report Components](#)
- [Create Job Definitions to Run Reports as Scheduled Processes](#)

## Configuring Deep Links

### Register Business Intelligence to Support Deep Linking

Deep linking lets you to navigate from an analysis on the interface pages to specific attributes and objects in your work areas so that you can work with them directly.

What does that mean? It means that if you're looking at an analysis on leads, for example, you can click a record on the analytic and go edit the lead record on the edit object page. To support deep links, use the Setup and Maintenance work area to register the Business Intelligence Server as a third-party application.

### Register Business Intelligence Server as a Third-Party Application

To register the BI Server:

1. Use the **Manage Third Party Applications** page.
2. Click **Create**.
3. Enter `AnalyticsApp` as the application name.
4. Enter the full URL for the BI Server (for example: `http://host:port/analytics/saw.dll`).
5. Enter `Analytics Server` as the Partner Name.
6. Click **Save and Close**.

#### Related Topics

- [Manage Integration of Additional Applications](#)

## Create Deep Links

Create deep links in your analytics that let you navigate from an analysis to specific attributes and objects in your transactional pages to work with them directly.

1. In the Reports and Analytics work area, click **Browse Catalog**.
2. Create or edit an analysis. Use a subject area that includes the attribute you want to link to in the transactional pages, and ensure that you include the object ID.
3. On the Criteria tab, click the **Options** icon for the attribute column on which you need a deep link and select **Column Properties**.
4. Open the Interaction tab in the Column Properties dialog box.
5. In the Primary Interaction list in the Value section, select **Action Links** to display the Action Links table.
6. Select the **Do not display in a pop-up if only one action link is available at runtime** option.
7. Click **Add Action Link**.
8. In the New Action Link dialog box, enter the link text for the navigation.
9. Click the **Create New Action** icon and select **Navigate to a Web Page**.
10. In the Create New Action dialog box, enter the URL to navigate to, which references parameters you define in the prompt. For shared analyses: `//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2}&action=@{3}&returnApp=AnalyticsApp&returnAppParams=PortalGo%26path=</shared/Custom/<folder>/@{6}`

**Note:** If you don't click the Return icon, remove parameters 5 through 7. In this case, the URL would be: `//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2};searchInd=@{3}&action=@{4}`

For personal analyses stored in My Folders: `//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2}&action=@{3}&returnApp=AnalyticsApp&returnAppParams=PortalGo%26path=/users/@{5}/@{6}`

11. Click **Define Parameters** to add corresponding parameters for the URL.
12. In the Define Parameters section, click **Add Parameter** to add the following mandatory parameters:

Name	Prompt	Type of Value	Value	Fixed	Hidden	Notes
1	Object Type	Value	<Object Type>	Selected	Selected	Used for shared and personal analyses.
2	<Prompt Name>	Column Value	Column Name in " <code>&lt;table.name&gt;</code> " format	Selected	Selected	Used for shared and personal analyses.
3	Action	Value	edit	Selected	Selected	Used for shared and personal analyses.
4	returnApp	Value	AnalyticsApp	Selected	Selected	Used for shared and personal analyses.

Name	Prompt	Type of Value	Value	Fixed	Hidden	Notes
5	Logged in User	Session Variable	USER	Selected	Selected	Session variable parameter used for personal analysis permissions.
6	Report Name	Value	Analysis Name	Selected	Selected	Used for shared and personal analyses. The name of the analysis to return to after working in the transactional page.

13. Click **Options** to set how the page opens.
14. In the Action Options dialog box, select **Open in New Window** to open the page in a new window.
15. Save your work.
16. If you have provided the Return Application name, a Return icon is available in the transactional page to return to the analysis.

#### Related Topics

- [Register Business Intelligence to Support Deep Linking](#)
- [Manage Analytics with Advanced Features](#)

## FAQs for Deep Links

### Why did a deep link open to a blank page?

You may not have access to the linked object, or the URL entered for the action is incorrect, for example lacking the environment or the Object ID name.

- Check the URL you entered for the action. It may be missing the environment name or the Object ID name.
- Check the URL parameters, the spelling of the action, and that you're using the correct key in the object's analysis.

### Do I have to display the ID for my object?

No, you can add it, format the column as a number with zero decimals, and then hide the column.

### Can I display actions for some users and not others?

Yes, you define conditions for the action to display.

# Manage Permissions

## Manage Catalog Permission

You may want to remove access to predefined catalog folders so that those associated with offerings you don't use aren't displayed. You can hide the entire predefined catalog or selectively display root catalog folders for offerings.

To control which offerings are available, create a custom role based on the Custom BI Web cat Reporting Duty role and its associated roles for each. Using custom roles, you can manage folder access in a number of ways, depending on requirements and previous modifications you have made.

- Add duty roles for parent folders to the custom role so that all users see a subset of the predefined catalog. Add roles only for the offerings you want to retain access for.
- Don't add any catalog reporting duty roles for any offerings to the custom role to hide the entire predefined catalog and display only **/Shared/Custom** folders. For example, you can remove BI catalog access for external users such as partners who have no access to reporting.
- Delete all catalog reporting duty roles from the custom role. Also, add catalog reporting duty roles to a new or existing job role so that job roles with BI access get default access to the predefined catalog. For example, by default, Financial job roles have access to Financial reporting content but Human Capital Management job roles don't have access to the predefined HCM BI catalog. You can grant the Human Capital Management Folder Reporting Duty role to new job roles to allow access to predefined HCM reports.

## Hide Predefined Catalog Folders

All authenticated users have the Custom BI Web cat Reporting Duty role, which inherits all of the folder reporting roles that determine access and visibility of root level catalog folders. Administrators with IT Security Manager privileges can hide predefined folders by creating custom roles based on this role and their associated roles from the duty role.

1. Open the Security Console.
2. Search for Custom BI Web cat Reporting Duty and review its duty roles to determine which to retain in your custom role.
3. Create a custom role.
4. Click **Actions > Add Role**.
5. Click **Next** twice to navigate to the Role Hierarchy step.
6. To hide all folders, leave the hierarchy empty. Add any roles for offerings you want to retain access for.
7. Run the **Import User and Role Application Security Data** process to synchronize security changes.
8. Click **Browse Catalog** in the Reports and Analytics work area and click **Administration**. In the Maintenance and Troubleshooting section, select **Reload Files and Metadata** to refresh the BI cache.

## BI Reporting Roles

This table shows the mapping between shared root catalog folders, folder reporting roles, and job roles.

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Common Content</b>	BI_COMMON_CONTENT_REPORTING_DUTY	Common Content Folder Reporting Duty	None

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Customer Data Management</b>	BI_CDM_REPORTING_DUTY	Customer Data Management Folder Reporting Duty	None
<b>/Shared/Enterprise Contracts</b>	BI_OKC_REPORTING_DUTY	Enterprise Contracts Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB, ORA_OKC_SUPPLIER_CONTRACT_TEAM_MEMBER_ABSTRACT
<b>/Shared/Extension</b>	BI_EXT_REPORTING_DUTY	Extension Folder Reporting Duty	None
<b>/Shared/Financials</b>	BI_FIN_REPORTING_DUTY	Financials Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_INVOICE_SUPERVISOR_JOB ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_PAYMENT_SUPERVISOR_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_SOD_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_SOD_JOB, ORA_AR_BILLING_MANAGER_JOB, ORA_AR_BILLING_SPECIALIST_JOB, ORA_CE_CASH_MANAGER_JOB, ORA_EXM_EXPENSE_MANAGER_JOB, ORA_FA_ASSET_ACCOUNTANT_JOB, ORA_FA_ASSET_ACCOUNTING_MANAGER_JOB, ORA_FUN_INTERCOMPANY_ACCOUNTANT_JOB, ORA_GL_FINANCIAL_ANALYST_JOB, ORA_VRM_REVENUE_ANALYST_JOB, ORA_VRM_REVENUE_MANAGER_JOB, ORA_XCC_BUDGET_MANAGER_JOB

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Higher Education</b>	BI_HED_REPORTING_DUTY	Higher Education Folder Reporting Duty	ORA_HEQ_ADMISSIONS_COORDINATOR_JOB, ORA_HEQ_ADMISSIONS_MANAGER_JOB, ORA_HER_ACADEMIC_COORDINATOR_JOB, ORA_HER_REGISTRAR_JOB, ORA_HES_BURSAR_JOB, ORA_HEY_STUDENT_SERVICES_MANAGER_JOB, ORA_HEY_STUDENT_SUPPORT_ADVISOR_JOB
<b>/Shared/Human Capital Management</b>	BI_HCM_REPORTING_DUTY	Human Capital Management Folder Reporting Duty	By default, predefined HCM job roles have no access to the predefined content.
<b>/Shared/Incentive Compensation</b>	BI_IC_REPORTING_DUTY	Incentive Compensation Folder Reporting Duty	ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB, ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_MANAGER_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB
<b>/Shared/Loyalty</b>	BI_LOY_REPORTING_DUTY	Loyalty Folder Reporting Duty	ORA_LOY_LOYALTY_MARKETING_MANAGER_JOB, ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB
<b>/Shared/Manufacturing</b>	BI_MFG_REPORTING_DUTY	Manufacturing Folder Reporting Duty	ORA_CSE_ASSET_ADMINISTRATOR_JOB
<b>/Shared/Marketing</b>	BI_MKT_REPORTING_DUTY	Marketing Folder Reporting Duty	ORA_MKL_SALES_LEAD_QUALIFIER_JOB, ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_ANALYST_JOB, ORA_MKT_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB, ORA_MKT_MARKETING_VP_JOB
<b>/Shared/Partner</b>	BI_ZPM_REPORTING_DUTY	Partner Folder Reporting Duty	ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Procurement</b>	BI_PRC_REPORTING_DUTY	Procurement Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_PO_BUYER_JOB, ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB, ORA_PO_PROCUREMENT_INTEGRATION_SPECIALIST_JOB, ORA_PO_PURCHASE_ANALYSIS_ABSTRACT, ORA_POQ_SUPPLIER_QUALIFICATION_DISCRETIONARY, ORA_POR_PROCUREMENT_REQUESTER_ABSTRACT, ORA_POZ_SUPPLIER_ADMINISTRATOR_ABSTRACT, ORA_POZ_SUPPLIER_MANAGER_ABSTRACT
<b>/Shared/Projects</b>	BI_PRJ_REPORTING_DUTY	Projects Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_PJF_GRANTS_ACCOUNTANT_JOB, ORA_PJF_GRANTS_ADMINISTRATOR_JOB, ORA_PJF_GRANTS_DEPARTMENT_ADMINISTRATOR_JOB, ORA_PJF_PROJECT_ACCOUNTANT_JOB, ORA_PJF_PROJECT_ADMINISTRATOR_JOB, ORA_PJF_PROJECT_BILLING_SPECIALIST_JOB, ORA_PJF_PROJECT_EXECUTION_ABSTRACT, ORA_PJF_PROJECT_EXECUTIVE_JOB, ORA_PJF_PROJECT_INTEGRATION_SPECIALIST_JOB, ORA_PJF_PROJECT_MANAGEMENT_DUTY_ABSTRACT, ORA_PJF_PROJECT_MANAGER_JOB, ORA_PJF_PROJECT_TEAM_MEMBER_ABSTRACT, ORA_PJF_PROJECTS_APPLICATION_ADMINISTRATOR_JOB, ORA_PJF_RESOURCE_MANAGER_JOB, ORA_PJF_TEAM_COLLABORATOR_ABSTRACT
<b>/Shared/Public Sector</b>	BI_PSC_REPORTING_DUTY	Public Sector Folder Reporting Duty	ORA_PSC_AGENCY_STAFF_ABSTRACT, ORA_PSC_BUILDING_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			INSPECTOR_JOB, ORA_PSC_BUSINESS_ANALYST_JOB, ORA_PSC_CHIEF_BUILDING_OFFICER_JOB, ORA_PSC_ECONOMIC_DEV_OFFICER_JOB, ORA_PSC_FINANCE_ADMIN_JOB, ORA_PSC_INSPECTIONS_SUPERVISOR_JOB, ORA_PSC_PERMIT_TECHNICIAN_JOB, ORA_PSC_PERMITS_APPLICATION_ADMINISTRATOR_JOB, ORA_PSC_PERMITS_SUPERVISOR_JOB, ORA_PSC_PLAN_COORDINATOR_JOB, ORA_PSC_PLAN_REVIEWER_JOB, ORA_PSC_PRINCIPAL_PLANNER_JOB, ORA_PSC_SYSTEM_ADMINISTRATOR_JOB
/Shared/Risk Management	BI_GRC_REPORTING_DUTY	Risk Management Folder Reporting Duty	ORA_GTG_APPLICATION_ACCESS_AUDITOR_JOB, ORA_GTG_APPLICATION_CONTROL_MANAGER_JOB, ORA_GTG_COMPLIANCE_MANAGER_JOB, ORA_GTG_ENTERPRISE_RISK_AND_CONTROL_MANAGER_JOB, ORA_GTG_RISK_MANAGEMENT_AUDITOR_JOB, ORA_GTR_USER_ACCESS_CERTIFICATION_MANAGER_JOB
/Shared/Sales	BI_ZBS_REPORTING_DUTY	Sales Folder Reporting Duty	ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZBS_SALES_MANAGER_JOB, ORA_ZBS_SALES_REPRESENTATIVE_JOB, ORA_ZBS_SALES_RESTRICTED_USER_JOB, ORA_ZBS_SALES_VP_JOB, ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB, ORA_ZSP_SALES_ANALYST_JOB
/Shared/Service	BI_SVC_REPORTING_DUTY	Service Folder Reporting Duty	ORA_CSO_KNOWLEDGE_ANALYST_JOB, ORA_CSO_KNOWLEDGE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_JOB,



Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_JOB, ORA_SVC_INTERNAL_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_INTERNAL_HELP_DESK_AGENT_JOB, ORA_SVC_INTERNAL_HELP_DESK_MANAGER_JOB, ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
/Shared/Subscription Management	BI_OSS_REPORTING_DUTY	Subscription Management Folder Reporting Duty	ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB
/Shared/Supply Chain Management	BI_SCM_REPORTING_DUTY	Supply Chain Management Folder Reporting Duty	ORA_ACD_PRODUCT_DESIGN_ENGINEER_JOB, ORA_ACD_PRODUCT_DESIGN_MANAGER_JOB, ORA_ACE_PRODUCT_MANAGEMENT_VP_JOB, ORA_ACE_PRODUCT_PORTFOLIO_MANAGER_JOB, ORA_CMF_FISCAL_DOCUMENT_SPECIALIST_JOB, ORA_CMF_RECEIVING_SPECIALIST_JOB, ORA_CMR_RECEIPT_ACCOUNTING_DISCRETIONARY, ORA_CSE_ASSET_ADMINISTRATOR_JOB, ORA_CST_COST_ACCOUNTANT_JOB, ORA_DOO_ORDER_ADMINISTRATOR_JOB, ORA_DOO_ORDER_MANAGER_JOB, ORA_EGI_PRODUCT_DATA_STEWARD_JOB, ORA_EGP_PRODUCT_MANAGER_JOB, ORA_ENQ_QUALITY_ANALYST_JOB, ORA_ENQ_QUALITY_ENGINEER_JOB, ORA_FOS_SUPPLY_CHAIN_CONTROLLER_JOB, ORA_INV_INVENTORY_MANAGER_JOB, ORA_INV_WAREHOUSE_MANAGER_JOB, ORA_MNT_MAINTENANCE_MANAGER_JOB, ORA_MNT_MAINTENANCE_TECHNICIAN_JOB, ORA_MSC_BACKLOG_MANAGER_JOB, ORA_MSC_DEMAND_AND_SUPPLY_PLANNER_JOB, ORA_MSC_DEMAND_PLANNER_JOB, ORA_MSC_MATERIALS_PLANNER_JOB, ORA_MSC_REPLENISHMENT_PLANNER_JOB, ORA_MSC_SALES_AND_OPERATIONS_PLANNER_JOB, ORA_MSC_SUPPLY_CHAIN_PLANNER_JOB, ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB, ORA_VCS_SUPPLY_CHAIN_COLLABORATION_PLANNER_JOB,

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			ORA_WSH_SHIPPING_MANAGER_JOB
<b>/Shared/Functional Setup</b>	BI_FSM_REPORTING_DUTY	Functional Setups Folder Reporting Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB
<b>/Shared/Security</b>	FBI_SECURITY_TRANSACTION_ANALYSIS_DUTY	Security Transaction Analysis Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_FND_IT_SECURITY_MANAGER_JOB

## Predefined Catalog Lockdown

If you try to modify the predefined catalog content including folder permissions, you get an alert indicating that you're not allowed to modify content and asking that you save your own content in the **/Shared/Custom** folder.

Here are a few things to know about catalog folders:

- You must save all modified content in the **/Shared/Custom** folder or in new folders in the **/Shared** folder.
- Existing modified content in the **/Shared/Custom** folder or custom folders in the **/Shared** folder and their subfolders is preserved. If you have modified the content in the predefined catalog folders, all changes are lost during any upgrade. To preserve content, archive your catalog content and unarchive it in the **Shared/Custom** folder after upgrade.
- All existing content in parent folders in the **/Shared** folder is preserved.
- You can't change folder or object permissions on the predefined catalog folders or content. For example, you can't change folder permissions to hide folders or objects.

### Related Topics

- [Archive and Move Analytics](#)
- [Role Inheritance](#)
- [Submit Scheduled Processes and Process Sets](#)

# 3 Flexfields

## Overview of Flexfield Use in Analyses

Flexfields are extensible sets of placeholder fields associated with business objects that can be placed on application pages. They're used to extend business objects and meet your data management requirements without changing the data model or performing any database programming.

To include flexfields you have used for extension for use in analyses, you must enable them for business intelligence.

Extension of analyses using flexfields is available for Oracle Enterprise Resource Planning Cloud and Oracle Human Capital Management Cloud.

### Flexfield Types

The following types of flexfields are available and provide a means to modify application features without programming:

- Descriptive
- Extensible
- Key

Depending on the flexfield type, business intelligence enablement is performed differently and has different requirements. Once they are enabled for business intelligence, you can import any changes made to flexfields automatically using an import scheduled process.

## Configure Key Flexfields for Transactional Business Intelligence

### Enable Key Flexfields for Business Intelligence Reporting

To include flexfields in your analyses, you must enable them for Business Intelligence. Extensibility of analysis using flexfields is used for Enterprise Resource Planning and Human Capital Management. For Customer Relationship Management, the Extensibility Framework supports this.

To designate key flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. On the Manage Key Flexfields page, enter your search value in Key Flexfield Code.
3. Click **Manage Structure Instances**.
4. Enter your search value in Structure Instance Code.
5. Click **Edit** to display the Edit Key Flexfield Structure Instance dialog box.
6. Select the **BI Enabled** option, then click **OK**.
7. For each flexfield segment instance, repeat steps 5 through 6.
8. Click **Save**.

9. Populate the BI Object Name for each of the segment labels:

- a. Query the Key Flexfield Code in the Manage Key Flexfields window.
- b. From the Actions menu, select **Manage Segment Labels**.
- c. Populate the BI Object Name for each segment label to be mapped. The BI Object Name for the following qualified segment labels should not be modified:

Segment Label Code	BI Object Name
FA_COST_CTR	Dim - Cost Center
GL_BALANCING	Dim - Balancing Segment
GL_ACCOUNT	Dim - Natural Account Segment

Before you deploy a flexfield, you must access the Chart of Accounts Instance and assign the newly created segment label to the appropriate segment in the Chart of Accounts.

- d. Click **Deploy Flexfield**.
- e. Click **Save and Close**.

*Related Topics*

- [Considerations for Enabling Key Flexfield Segments for Business Intelligence](#)
- [How do I update existing setup data?](#)

## Overview of Supported HCM Key Flexfields

You use key flexfields to store internally defined codes unique to a particular business, specifying part numbers, general ledger accounts, and other business entities.

Product Area	Key Flexfield	Dimension
Payroll	Costing	Dim - Costing Segments

## Map Non-Qualified Segments to BI Objects

To map non-qualified segments that must be mapped and used in analysis, create a new label and associate a BI object with the label. Associate this new segment label with the segment code.

To map non-qualified segments to BI objects:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. On the Manage Key Flexfields page, search for the appropriate key flexfield code.
3. From the Actions menu, select **Manage Segment Labels**.
4. Click the **Add Row** icon.
5. Enter the details for the Segment Label Code, including name, description, and BI Object name. Enter the BI object names carefully and note whether there is a space between **Segment** and the number.

This table provides examples of Key Flexfields and associated BI object names.

Key Flexfield	BI Object Name
Accounting (GL)	Dim - GL Segment1 through Dim - GL Segment10
Budgetary Control (XCC)	Dim - XCC Segment1 through Dim - XCC Segment10
Revenue Management (VRM)	Dim - VRM Segment 1 through Dim - VRM Segment 10

6. Complete the mapping by assigning unique segment labels to the key flexfields.

## Set Up the GL Accounting Flexfields

This topic describes the workflow for setting up Accounting key flexfields, but these steps also apply for other key flexfields.

- Understanding Accounting Key Flexfields
- Identifying Accounting Key Flexfields
- Assigning Unique Segment Labels
- Performing Column Flattening
- Designating GL Accounting Segment Instances as BI-Enabled
- Deploying Accounting Key Flexfields

### Understanding Accounting Key Flexfields

The Accounting Key Flexfield is used to identify GL accounts.

A chart of accounts segment is a component of the accounting key flexfield. Each segment has a value set attached to it to provide formatting and validation of the set of values used with that segment. The combination of segments creates the account combination used for recording and analyzing financial transactions. You must set up your Chart of Accounts (COA) as part of implementing Oracle Applications Cloud.

Examples of segments that may be found in a chart of accounts structure include Company, Cost Center, Department, Division, Region, Account, Product, Program, and Location.

The Natural Account segment of the General Ledger Accounting Key Flexfield defines the account used in the account combination to record transactions.

The logical segment dimensions in the Oracle BI metadata are **Dim - Cost Center**, **Dim - Balancing Segment**, **Dim - Natural Account Segment** and all **Dim - GL Segment<sub>n</sub>** dimensions. These dimension tables are populated from a Tree value object or from a Value Set value object. Which value is used depends on whether a tree was associated with the segment in the Oracle Applications Cloud setup:

- For each segment associated with trees, two value objects are generated (Tree and TreeCode) with the following naming structure:

```
FscmTopModelAM.AccountBIAM.FLEX_TREE_VS_segmentlabel_VI &
```

```
FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_segmentlabel_VI
```

- For each segment without trees, one view object is generated with the following naming structure:

```
FscmTopModelAM.AccountBIAM.FLEX_VS_ XXX_VI
```

In addition to the segment dimension tables, the BI Extension process also extends **Flex BI Flattened VO**; **FscmTopModelAM.AccountBIAM.FLEX\_BI\_Account\_VI**. This view object has a pair of columns for each segment; **segmentlabel\_** and **segmentlabel\_c**.

For example, for your Cost Center segment which has the segment label **FA\_COST\_CTR**, there are two columns in this view object, named **FA\_COST\_CTR\_** and **FA\_COST\_CTR\_c**.

## Identifying Accounting Key Flexfield Segments

Identify and map segments of the chart of accounts.

For each Chart of Accounts (Accounting Key Flexfield) used to analyze Transactional Business Intelligence facts, identify the segments of the chart of accounts. Map them to the Transactional Business Intelligence GL Accounting Segment logical dimensions.

Accounting Key Flexfield Segment	Segment Label	Transactional Business Intelligence GL Accounting Segment Logical Dimension
Balancing	GL_BALANCING	Dim - Balancing Segment
Natural Account	GL_ACCOUNT	Dim - Natural Account Segment
Cost Center	FA_COST_CTR	Dim - Cost Center
Other segments to be equalized across the charts of accounts	Other unique segment label	Dim - GL Segment <i>n</i> where <i>n</i> is an integer from 1 to 10

## Assigning Unique Segment Labels

You must assign a unique segment label to the charts of accounts segments that are the balancing segments or the natural account segments. The segments must be also used for specific purposes.

For example, assign the Primary Balancing segment label to the segment used for your company or legal entities. That label provides a correct recording of intercompany transactions and company analysis. You can assign other segment labels when required.

To assign unique segment labels to charts of accounts segments:

1. In the Setup and Maintenance work area, go to the **Manage Charts of Accounts** task and then navigate to the Manage Chart of Accounts page.
2. In the Search section, enter the GL# for the **Key Flexfield Code** and click the **Search** button.
3. In the Search Results section, select **Accounting Flexfield** and click the **Manage Structures** button to navigate to Manage Key Flexfield Structures.
4. In the Search section, enter the chart of accounts code or the name for Structure Code or Name and click the **Search** button.
5. In the Search Results section, select the chart of accounts and click **Edit** to navigate to the Edit Key Flexfield Structure window.
6. Select the **Enabled** check box to code-enable the Structure code.
7. In the Segments section, select the applicable segments and click **Edit** to navigate to the Edit Key Flexfield Segment window.
8. Select the Enabled check box to enable the segments.
9. In the Segment Labels section, select the unique segment labels to equalize the segments across the charts of accounts. Click the **shuttle** to move the segments to the selected list.
10. Click **Save and Close** to return to the Edit Key Flexfield Structure window.
11. Click **Done** to return to the Manage Key Flexfields window.

## Performing Column Flattening

Column flattening of trees is required in order for OTBI hierarchy analyses to be populated with correct data.

To flatten columns for account hierarchies:

1. In the Setup and Maintenance work area, go to the **Manage Trees and Tree Versions** task and navigate to the Manage Trees and Tree Versions window.
2. In the Search section, enter **GL\_ACCT\_FLEX** for the Tree Structure Code and the involved tree code or name, and click **Search**.
3. In the Search Results section, select the tree version you want to flatten. If the status of the Tree Version is Draft, to make the Tree Version active, select **Actions**, then **Status**, and then **Active**.
4. (Optional): After the tree version is specified, perform an audit on the Tree Version to ensure its integrity before launching the flattening job. Select **Actions** and then **Audit**. See the section on working with Trees in the Developer's Guide.
5. Choose **Column Flattening** from the **Actions** menu.
6. Click the **Online Flattening** button to launch the flattening job immediately. Or, click the **Schedule Flattening** button to schedule the flattening job according to your requirements.

## Designating GL Accounting Segment Instances as BI-Enabled

Specify the applicable chart of accounts segment instances that are BI-enabled to make them available for use in Transactional Business Intelligence.

To specify the chart of accounts segment instances as BI-enabled:

1. In the Search Results section of the Manage Key Flexfields window, select **Accounting Flexfield** and click the **Manage Structure Instances** button to navigate to the Manage Key Flexfield Structure Instances window.
2. In the Search section, select the chart of accounts for Structure Name and click the **Search** button.
3. In the Search Results section, select the structure instance and click **Edit** to navigate to the Edit Key Flexfield Structure Instance window.
4. Check the **Enabled** check box to code-enable the structure instance.

5. In the Segment Instances section, select the segment instances and click **Edit** to update. Each of the segment instances must be selected individually.
6. Select the **Business Intelligence enabled** check box in the Edit Key Flexfield Segment pop-up window and click **OK** to return to Edit Key Flexfield Structure Instance window.
7. After you have enabled all applicable segment instances for Business Intelligence, click **Save and Close** to save the changes and return to the Edit Key Flexfield Structure Instance window.
8. Repeat steps 2 - 6 for each chart of accounts to enable all the applicable segment instances for Business Intelligence.
9. Click **Done** to return to the Manage Key Flexfields window.
10. After you have configured all the charts of accounts, click the **Deploy Flexfield** button to deploy the Accounting Flexfield and make the latest definition available for use.

## Deploying Accounting Key Flexfields

After you have set up accounting key flexfields, you must deploy them.

Accounting key flexfields have one of the following deployment statuses:

- Edited: The flexfield definition has not been deployed or changes have been made to the structure, the structure instances, or the value sets.
- Patched: The flexfield definition has been modified through an update, but the flexfield has not yet been deployed so the updated definition is not reflected.
- Deployed to Sandbox: The flexfield is deployed and available in a flexfield-enabled sandbox.
- Deployed: The flexfield definition is deployed and available to end users.
- Error: The deployment attempt failed.

To deploy accounting key flexfields:

1. In the Setup and Maintenance work area, go to the **Manage Chart of Accounts** task.
2. Click **Search**.
3. Locate the Deployment Status column.
4. Click the icon.
5. Select **Edited**.
6. Click **Deploy Flexfield**.
7. Monitor the Deployment Status and when it reaches 100% click **OK**.
8. Verify that a check mark displays in the Deployment Status column.
9. Click **Done**.

## Configure Descriptive Flexfields for Transactional Business Intelligence

### Overview of Transactional Business Intelligence Configuration of Descriptive Flexfields

Configure descriptive flexfields to track unique information not typically found on business forms.



Descriptive flexfields can store several important details on a form without cluttering it. For example, several details may make an asset form heavy and unmanageable. However, the user still needs to access those details and therefore, they must be present on the form. In such cases, descriptive flexfields are convenient to use and are easy to manage.

Descriptive flexfields provide a way for you to add attributes to entities and to define validation and display properties for them. A descriptive flexfield is a logical grouping of attributes (segments) that are mapped to a set of extension columns which are shipped as part of Oracle Applications Cloud tables.

#### *Related Topics*

- [Configure Descriptive Flexfield Segments](#)
- [Set Descriptive Flexfields as BI-Enabled](#)

## Configure Descriptive Flexfield Segments

If a descriptive flexfield is enabled for Oracle Business Intelligence, you can enable global and context segments for Oracle Business Intelligence, and you can select segment labels. Not all descriptive flexfields are supported for Business Intelligence.

### Configuring a Descriptive Flexfield Segment

If a descriptive flexfield is enabled for Oracle Business Intelligence, you can enable global and context segments for Oracle Business Intelligence, and you can select segment labels. Not all descriptive flexfields are supported for Business Intelligence.

To configure available descriptive flexfield segments:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
2. If the **BI Enabled** option is cleared, select it.
3. Select the options for deployment of the descriptive flexfields.

#### *Related Topics*

## Set Descriptive Flexfields as BI-Enabled

If a descriptive flexfield is already defined, you can enable it for use in Business Intelligence reports. Not all descriptive flexfields are supported for Business Intelligence.

### Setting a Flexfield as BI-Enabled

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
2. Navigate to the **Edit Descriptive Flexfields** window.
3. Enter the descriptive flexfield name.
4. Check the **BI Enabled** option on the desired descriptive flexfields. If the option is unavailable, the flexfield is a non-supported entity.
5. Click **OK**.
6. Click **Save**.

# Configure Extensible Flexfields for Transactional Business Intelligence

## Configure Extensible Flexfields

You can use extensible flexfields to configure more segments.

An extensible flexfield is similar to a descriptive flexfield in that it provides an expansion space that you can use to configure additional attributes (segments) without additional programming. As with descriptive flexfields, each segment is represented in the database as a single column. However, with extensible flexfields, the context values and context-sensitive segments are stored in an extension table.

### Categories and Contexts

You can combine and arrange the segments into attribute groups that are tailored to your specific needs. For example, you can group related segments so that they appear together on the page. The attribute groups are referred to as contexts. You can optionally set up an extensible flexfield to enable categorization of contexts.

You can add contexts and segments to extensible flexfields just like the descriptive flexfields. To see the extensible flexfields in analyses, you need to deploy them and then run the BI Extender Essbase scheduled process.

## Configure Extensible Flexfields

To configure extensible flexfields:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfield** task.
2. Search for the EFF you want to configure, then select it and click the **Edit** icon.
3. In the Edit Extensible Flexfield dialog, highlight the category Display Name, then select **Manage Contexts**.
4. In the Manage Context dialog, search for the context that contains the segment you want to configure, highlight it, then click the **Edit** icon.
5. In the Edit Context dialog, click the **Edit** icon.
6. Edit the segment, as required, then click **Save**.

#### *Related Topics*

- [Flexfield Usages](#)

## Set Extensible Flexfields as BI-Enabled

Extensible flexfields are BI enabled if at least one segment in a context is BI enabled.

### Setting Extensible Flexfields as BI-Enabled

To set extensible flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfields** task.
2. Enter the extensible flexfield name; for example, **Organization Information EFF**.
3. Select the applicable extensible flexfield, and then click **Edit**.
4. Select the applicable Category. The category contexts are populated automatically.
5. Click **Manage Contexts**.
6. In the Edit Context page, select the applicable Context, and then click **Edit**.
7. Select the applicable Segment, and then click **Edit**.
8. In the Edit Segment page, select the **BI Enabled** check box.
9. Click **Save**.

#### Related Topics

- [Configure Extensible Flexfields](#)

## Overview of the Essbase Rule File and Cubes

Generate the Essbase rule file by running the Create Rules XML File for BI Extender Automation scheduled process.

The Essbase rule file must be generated for all Oracle Essbase cubes mapped in the repository file (RPD).

### Job Status Conditions

The process status displays one of these conditions.

- **INIT:** The process has just begun and is waiting for the extender command line JAR to update the status with more details.
- **COMPLETED\_NO\_EXTENSION\_NEEDED:** No new Flexfield changes were detected in any of the Oracle Applications Cloud sources; because the RPD is already synchronized with all Flexfield changes, no changes were made in the RPD.
- **COMPLETED:** The RPD was successfully updated with Flexfield changes and uploaded into the Oracle Business Intelligence server.
- **FAILED:** Error conditions exist which require manual intervention.

#### Related Topics

- [Submit Scheduled Processes and Process Sets](#)

## Import Changes to Flexfields Automatically

### Overview of Flexfield Change Import

You can use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process to import your flexfield changes.

Use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process to automatically import the following types of changes:

- Key Flexfield changes
- Descriptive Flexfield changes
- Extensible Flexfield changes

The Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process imports extensible data, including data in descriptive flexfield segments, key flexfield segments, and General Ledger balances in Essbase cubes.

If you have changes to key flexfields and descriptive flexfields, you can import all the changes in the same scheduled process.

This is an Oracle Applications Cloud scheduled process; it's not related to BI Applications. Detailed information on this process can be found in Oracle Applications Cloud documentation.

**Note:** We strongly recommend that you backup the Oracle Transactional Business Intelligence prior to importing any flexfield changes. Running the process disconnects all users from the server. You should not run this process when maintenance operations or system updates are being performed on the server.

## Performance and Flexfields

Flexfield changes and additions increase the size of the metadata repository and over time can cause performance issues or the repository size to exceed limitations. We recommend that you import and enable for BI only those flexfields that are required. To preserve performance, the following guidelines should be kept in mind:

- Don't BI-enable extensible flexfield (EFF) attributes that aren't needed for analysis in OTBI.
- Disable EFF attributes that are no longer being used. Limit the number of attributes that are inherited by a large number of classes to be BI enabled, as this results in increased repository size.

## Extensible Flexfields and Repository Size

If all BI-enabled attributes are assigned at the root level, then the repository size calculation is the total number of item classes multiplied by the number of BI-enabled attributes. If not, the size calculation is based on the number of child item classes for an item class to which the BI-enabled attribute is assigned.

Let's look at an example. If BI-enabled attribute ABC is assigned to item class XYZ and it has 10 child item classes, it would generate a segment for each. So BI-enabled segments at item class XYZ (in this case having only one attribute, ABC) would be 10. Also note that the EFF attributes are copied in each subject area of the repository where the Item dimension is used. So, if there are 20 subject areas with the Item dimension, the ABC attribute appears in all of them, thus showing up 200 times, or 10 segments multiplied by 20.

## Run the Import Scheduled Process

To import changes, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process.

## Run the Job

To run the process:

1. In the **Scheduled Processes** window, select **Search and Select: Name**.
2. Select **Search and Select: Name**.
3. Highlight **Import Oracle Fusion Data Extensions for Transactional Business Intelligence**.
4. Click **OK**.
5. Schedule the process.

## Process Status Conditions

When the process is finished, the **biExtenderCMDUtility.jar** writes the status of the process into the JNDI file **ess\_biExtenderEssJob\_jobStatus**, which can be viewed in Oracle WebLogic Server.

The process status displays one of the following conditions:

- **INIT:** The process has just begun and is waiting for the extender command line JAR to update the status with more details.
- **COMPLETED\_NO\_EXTENSION\_NEEDED:** No new Flexfield changes were detected in any of the Oracle Applications Cloud sources; because the Oracle Business Intelligence is already synchronized with all Flexfield changes, no changes were made in the Oracle Business Intelligence.
- **COMPLETED:** Oracle Business Intelligence was successfully updated with Flexfield changes and uploaded into the Oracle Business Intelligence Server.
- **COMPLETED: PROCESS\_ERRORS:** Oracle Business Intelligence was updated with the Flexfield changes but with some warnings that require manual intervention.
- **FAILED:** Error conditions exist that require manual intervention.

## Successful Import Process

If the import process is successful, you can perform the following actions:

- Query subject areas by segment dimensions such as Balancing Segment and Cost Center.
- Access DFF attributes for analyses.
- Use the General Ledger - Balances Real Time subject area to query Oracle Essbase cubes.

# Disable Flexfields as BI-Enabled

## Overview

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

There may be times, such as during development phases, when you try using a flexfield and later determine it is no longer needed.

**Note:** If you are considering disabling flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence. If you disable a flexfield, it cannot be deployed. Also, error conditions may occur if you disable a descriptive flexfield that has been implemented in BI Applications. If error conditions arise from disabling flexfields as BI-enabled, troubleshooting the errors can be difficult and time-consuming.

#### *Related Topics*

- [Disable Key Flexfields as BI-Enabled](#)
- [Disable Descriptive Flexfields as BI-Enabled](#)
- [Disable Extensible Flexfields as BI-Enabled](#)

## Disable Key Flexfields as BI-Enabled

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling key flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence.

### Disabling Key Flexfields

To disable key flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. Enter your search value in **Key Flexfield Code**.
3. Click **Manage Structure Instances**.
4. Enter your search value in **Structure Instance Code**.
5. Click **Edit**. The Edit Key Flexfield Structure Instance dialog box displays.
6. In **Edit Key Flexfield Segment Instance**, deselect the **BI Enabled** option.
7. Click **OK**, then **Save**.

## Disable Descriptive Flexfields as BI-Enabled

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling descriptive flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence.

### Disabling Descriptive Flexfields

To disable descriptive flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
2. Enter the **Descriptive Flexfield Name**.
3. Deselect the **BI Enabled** option on the desired descriptive flexfields.
4. Click **OK**, then **Save**.

## Disable Extensible Flexfields as BI-Enabled

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling extensible flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Oracle Transactional Business Intelligence.

### Disabling Extensible Flexfields

To disable extensible flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfields** task.
2. Enter the extensible flexfield Name; for example, "Organization Information EFF."
3. Select the applicable extensible flexfield and click **Edit** to navigate to Edit Extensible Flexfield.
4. Select the applicable Category. The category contexts are populated automatically.
5. Click **Manage Contexts** to navigate to Manage Contexts.
6. Select the applicable Context and click **Edit** to navigate to Edit Context.
7. Select the applicable Segment and click **Edit** to navigate to Edit Segment.
8. Deselect the **BI Enabled** option.
9. Click **Save**.

## Human Capital Management Repository and Session Variables for Business Intelligence

You can use these repository and session variables in your analyses.

Variable Name	Type	Usage	Offering
CURRENT_DAY	Session Variable	Returns the value of Current Date.	All
CURRENT_MONTH	Repository Variable	Returns the value of Current Month in the YYYY/MM format.	All
CURRENT_WEEK	Repository Variable	Returns the value of the current week in YYYY Weeknnn format.	All
CURRENT_QUARTER	Repository Variable	Returns the value of Current Quarter in YYYY Q n format.	All
CURRENT_YEAR	Repository Variable	Returns the value of Current Year in the YYYY format.	All
NEXT_MONTH	Repository Variable	Returns the value of Next Month in the YYYY / MM format.	All

Variable Name	Type	Usage	Offering
NEXT_WEEK	Repository Variable	Returns the value of Next Week in the YYYY Week nn format.	All
NEXT_QUARTER	Repository Variable	Returns the value of Next Calendar Quarter in the YYYY Q nn format.	All
NEXT_YEAR	Repository Variable	Returns the value of Next Year in the YYYY format.	All
PREVIOUS_MONTH	Repository Variable	Returns the value of Previous Month in the YYYY/MM format.	All
PREVIOUS_WEEK	Repository Variable	Returns the value of Previous Week in the YYYY Week nn format.	All
PREVIOUS_QUARTER	Repository Variable	Returns the value of Previous Quarter in the YYYY Q nn format.	All

These variables are available for Human Capital Management only.

Variable Name	Type	Usage	Offering
PERSON_ID_HCM	Session Variable	Identifies the person ID of the logged in user.	Human Capital Management

## Repository and Session Variables for Business Intelligence

This table shows repository and session variables available for use in your analyses.

Variable Name	Type	Usage	Offering
CURRENT_DAY	Session Variable	Returns the value of Current Date.	All
CURRENT_MONTH	Repository Variable	Returns the value of Current Month in the YYYY/MM format.	All
CURRENT_WEEK	Repository Variable	Returns the value of the current week in YYYY Weeknnn format.	All



Variable Name	Type	Usage	Offering
CURRENT_QUARTER	Repository Variable	Returns the value of Current Quarter in YYYY Q n format.	All
CURRENT_YEAR	Repository Variable	Returns the value of Current Year in the YYYY format.	All
DISPLAYNAME	Session Variable	Returns the user name displayed to the user in the greeting, used as the author field for catalog objects when they're saved.	All
NEXT_MONTH	Repository Variable	Returns the value of Next Month in the YYYY / MM format.	All
NEXT_WEEK	Repository Variable	Returns the value of Next Week in the YYYY Week nn format.	All
NEXT_QUARTER	Repository Variable	Returns the value of Next Calendar Quarter in the YYYY Q nn format.	All
NEXT_YEAR	Repository Variable	Returns the value of Next Year in the YYYY format.	All
PREVIOUS_MONTH	Repository Variable	Returns the value of Previous Month in the YYYY/MM format.	All
PREVIOUS_WEEK	Repository Variable	Returns the value of Previous Week in the YYYY Week nn format.	All
PREVIOUS_QUARTER	Repository Variable	Returns the value of Previous Quarter in the YYYY Q nn format.	All
USER	Session Variable	Holds the value the user enters when logging in.	All

## Dimensions Supported by Descriptive Flexfields

### Human Capital Management Descriptive Flexfields for Oracle Transactional Business Intelligence

You can use these Human Capital Management descriptive and extensible flexfields with Oracle Transactional Business Intelligence. The reference tables include the:

- Oracle HCM Cloud page where the flexfield appears.

- Folder in Transactional Business Intelligence that contains the flexfield after you import it.

To see which subject area a folder is located in, see Data Lineage for Oracle Human Capital Management Cloud. Go to Help for Business Intelligence in Oracle Applications Cloud and click the Data Lineage link under Oracle Human Capital Management Cloud.

These are the descriptive flexfields.

Descriptive Flexfield Code and Name	Location in Oracle HCM Cloud	Location in Transactional Business Intelligence
ANC_ABSENCE_CATEGORIES_DFF Absence Category Attributes	Manage Absence Categories	Dimension: Assignment Absences Details
ANC_ABSENCE_PLANS_DFF Absence Plan Attributes	Manage Absence Plans	Dimension: Assignment Absences Details
ANC_ABSENCE_REASONS_DFF Absence Reason Attributes	Manage Absence Reasons	Dimension: Assignment Absences Details
ANC_ABSENCE_TYPES_DFF Absence Type Attributes	Manage Absence Types	Dimension: Assignment Absences Details
HNS_INCIDENTS_DFF Incident Details	Safety Incidents	Dimension: Incident Details
HNS_ACTIONS_DFF Incident Action Details	Safety Incidents	Dimension: Incident Action Details
HNS_INJURED_PERSON_DFF Injured Person	Safety Incidents	Dimension: Incident Event Details/Injury or Illness
HNS_INJURED_PERSON_SUMMARY_DFF Injured Person Summary	Safety Incidents	Dimension: Incident Event Details/Injury or Illness
HNS_INVEST_SUMMARY_DFF Investigation Summary	Safety Incidents	Dimension: Incident Investigation Details
HNS_AIR_QUALITY_EVT_DFF Air Quality Events	Safety Incidents	Dimension: Incident Event Details/Air Quality
HNS_ERGONOMIC_EVENTS_DFF	Safety Incidents	Dimension: Incident Event Details/Ergonomic

Descriptive Flexfield Code and Name	Location in Oracle HCM Cloud	Location in Transactional Business Intelligence
Ergonomic Events		
HNS_FIRE_OR_EXPLOSION_EVENTS_DFF Fire or Explosion Events	Safety Incidents	Dimension: Incident Event Details/Fire or Explosion
HNS_ISSUE_EVENTS_DFF Issue Events	Safety Incidents	Dimension: Incident Event Details/Issue
HNS_NEAR_MISS_EVENTS_DFF Near Miss Events	Safety Incidents	Dimension: Incident Event Details/Near Miss
HNS_VEHICLE_INCIDENT_DFF Vehicle Events	Safety Incidents	Dimension: Incident Event Details/Vehicle Incident
HNS_DRIVER_AND_VEHICLE_EVENTS_DFF Driver and Vehicle	Safety Incidents	Dimension: Incident Event Details/Vehicle Incident
HNS_NOTICE_OF_VIOLATION_EVENTS_DFF Notice of Violation Events	Safety Incidents	Dimension: Incident Event Details/Notice of Violation
HNS_PROPERTY_DAMAGE_EVENTS_DFF Property Damage Events	Safety Incidents	Dimension: Incident Event Details/Property Damage
HNS_SPILL_OR_RELEASE_EVENTS_DFF Spill or Release Events	Safety Incidents	Dimension: Incident Event Details/Spill or Release
HNS_SUGG_FOR_IMPROV_EVENTS_DFF Suggestion for Improvement Events	Safety Incidents	Dimension: Incident Event Details/Suggestion for Improvement
HNS_UNSAFE_ACT_EVENTS_DFF Unsafe Act Events	Safety Incidents	Dimension: Incident Event Details/Unsafe Act
HNS_UNSAFE_CONDITION_EVENTS_DFF Unsafe Condition Events	Safety Incidents	Dimension: Incident Event Details/Unsafe Conditions
HNS_RISK_ASSESSMENTS_DFF Risk Assessments	Safety Incidents	Dimension: Incident Details

Descriptive Flexfield Code and Name	Location in Oracle HCM Cloud	Location in Transactional Business Intelligence
HNS_UNAUTHD_SYSTEM_ACCESSES_DFF Unauthorized System Access Events	Safety Incidents	Dimension: Incident Event Details/ Unauthorized System Access Events
HNS_SUSPICIOUS_EMAIL_OR_CALLS_DFF Suspicious Email or Calls Events	Safety Incidents	Dimension: Incident Event Details/ Suspicious Email or Calls Events
HNS_OTHER_DATA_SECURITY_ISSUES_DFF Other Data Security Issues Events	Safety Incidents	Dimension: Incident Event Details/ Other Data Security Issues Events
HNS_LOST_OR_STOLEN_DEVICES_DFF Lost or Stolen Device Events	Safety Incidents	Dimension: Incident Event Details/ Lost or Stolen Device Events
PER_ACT_DFF Additional Action Attributes	Manage Employment Actions	Dimension: HR Action
PER_ACT_LEG_DDF Legislative Action Attributes	Manage Actions	Dimension: HR Action
PER_ACT_REASONS_DFF Additional Action Reason Attributes	Manage Employment Actions	Dimension: HR Action Reason
PER_ADDRESSES_DFF	Manage Person	Dimension: Location
PER_ALL_PEOPLE_DFF	Manage Person	Dimension: Person Details
PER_ASG_DF Assignment Attributes	Employment Assignment	Dimension: Worker Assignment Details
PER_ASG_LEG_DDF Legislative Assignment Attributes	<p>Employment Information page, Assignment tab for these tasks:</p> <ul style="list-style-type: none"> <li>Add Contingent Worker</li> <li>Manage Employment</li> <li>Add Assignment</li> <li>Add Employment Terms (Also appears on the Terms tab for this task)</li> </ul> <p>Employment Information page, Assignments tab, Contracts region (Single Contract Single Assignment) for these tasks:</p>	<p>Dimension: Worker Assignment Details</p> <p>Assignment Event Details</p>

Descriptive Flexfield Code and Name	Location in Oracle HCM Cloud	Location in Transactional Business Intelligence
	<ul style="list-style-type: none"> <li>Hire an Employee</li> <li>Add NonWorker</li> <li>Add Pending Worker</li> <li>Create Work Relationship</li> </ul> <p>Job Details page in Manager Self-Service (Line Manager) for these tasks:</p> <ul style="list-style-type: none"> <li>Promote</li> <li>Transfer</li> <li>Change Working Hours</li> </ul>	
PER_CITIZENSHIPS_DFF Citizenship Attributes	Manage Person	Dimension: Person Citizenship
PER_CONTACT_RELSHIPS_DFF Contact Relationships Attributes	Manage Person	Dimension: Person Contact Relationship
PER_CONTRACT_DF Contract Attributes	Manage Employment - Employment Term	Dimension: Employment Contract Details
PER_CONTRACT_LEG_DDF Contract Legislative Information	<p>Employment Information page, Terms tab, Contracts region (Single Contract Single Assignment) for these tasks for the Line Manager and HR Specialist:</p> <ul style="list-style-type: none"> <li>Hire an Employee</li> <li>Add NonWorker</li> <li>Add Pending Worker</li> <li>Create Work Relationship</li> </ul> <p>Also appears on these pages:</p> <ul style="list-style-type: none"> <li>Manage Employment (HR Specialist) - Terms tab</li> <li>Add Assignment - Employment Information page, Assignment tab</li> <li>Add Employment Terms -Employment Information page, Terms tab</li> </ul>	Dimension: Employment Contract Details
PER_DOC_OF_RECORD_LEG_DDF Document of Record Legislative Information	Manage Documents of Record	Dimension: Document of Record Details
PER_DOC_OF_RECORD_LEG_DFF Documents of Record Attributes	Manage Documents of Record	Dimension: Document of Record Details

Descriptive Flexfield Code and Name	Location in Oracle HCM Cloud	Location in Transactional Business Intelligence
PER_DRIVERS_LICENSE_TYPES_DFF Drivers License Types Attributes	Manage Person	Dimension: Person Driver License
PER_EMAIL_ADDRESSES_DFF Email Addresses Attributes	Manage Person	Dimension: Person Email Addresses
PER_ETHNICITIES_DFF Ethnicity Attributes	Manage Person	Dimension: Person Ethnicity
PER_GRADES_DF Grade Additional Details	Manage Grades	Dimension: HR Grade
PER_JOBS_DFF Job Attributes	Manage Jobs	Dimension: Job
PER_JOB_FAMILY_DFF Job Family Attributes	Manage Job Family	Dimension: Job
PER_LOCATIONS_DF Location Attributes	Manage Location	Dimension: Worker Location
PER_NATIONAL_IDENTIFIERS_DFF National Identifiers Attributes	Manage Person	Dimension: Person National Identifiers
PER_ORGANIZATION_UNIT_DFF Organization Attributes	Manage Department	Dimension: Department
PER_PERSON_ADDR_USG_DFF Person Address Usage Attributes	Manage Person	Dimension: Person Address
PER_PERSON_ALLOCATION_DDF Person Allocated Task Attributes	Allocated Checklists	Workforce Management: Checklist Real Time Allocated Checklist
PER_PERSON_CONTACT_RELATIONSHIP_DDF Person Contact Relationship Information	Manage Person	Dimension: Person Contact Information
PER_PERSON_DISABILITY_DFF	Manage Person	Person Disability

Descriptive Flexfield Code and Name	Location in Oracle HCM Cloud	Location in Transactional Business Intelligence
Person Disability Attributes		
PER_PERSON_DISABILITY_LEG_DDF Person Disability Legislative Information	Manage Person	Person Disability
PER_PERSON_DLVRY_METHODS_DFF Delivery Methods Attributes	Manage Person	Dimension: Person Delivery Methods
PER_PERSONDRIVERS_LICENSE_LEG_DDF Person Drivers License Legislative Information	Manage Person	Dimension: Person Driver License
PER_PERSON_LEGISLATIVE_DATA_LEG_DDF Person Legislative Information	Manage Person and New Hire	Dimension: Person Legislative Information
PER_PERSON_LEGISLATIVE_DFF Person Legislative Attributes	Legislative section of Manage Person	Dimension: Person Legislative Information
PER_PERSON_NAME_DFF	Manage Person	Dimension: Person Names
PER_PERSON_NAME_LEG_DDF Person Name Legislative Information	Not exposed	Dimension: Person Names
PER_PERSON_PASSPORT_LEG_DDF Person Passport Legislative Information	Manage Person and New Hire	Dimension: Person Passport Details
PER_PERSON_TYPE_USG_DFF	Manage Person	Dimension: Person Types
PER_PERSON_VISA_LEG_DDF Person Visa Legislative Information	Manage Person and New Hire	Dimension: Person Work Permit
PER_PERSONS_DFF Persons Attributes	New Hire	Dimension: Worker
PER_PHONES_DFF Phones Attributes	Manage Person	Dimension: Person Phones
PER_POSITIONS_DFF	Manage Position	Dimension: HR Position

Descriptive Flexfield Code and Name	Location in Oracle HCM Cloud	Location in Transactional Business Intelligence
Position Attributes		
PER_PPS_LEG_DDF Work Relationship Legislative Information	<p>Employment Information page, Work Relationship Details region for Line Manager and HR Specialist for these tasks:</p> <ul style="list-style-type: none"> <li>Hire an Employee</li> <li>Add Contingent Worker</li> <li>Add NonWorker</li> <li>Add Pending Worker</li> <li>Create Work Relationship</li> <li>Manage Work Relationship (HR Specialist) - Work Relationship Details</li> </ul> <p>Work Relationship Details region in these tasks:</p> <ul style="list-style-type: none"> <li>Manager Self-Service (Line Manager and HR Specialist), Terminate</li> <li>Manage Work Relationship (HR Specialist)</li> </ul>	Dimension: Work Relationship Details
PER_PPS_DF Work Relationship Attributes	Manage Work Relationship, Termination, Add Person, Create Work Relationship	Dimension: Work Relationship Details
PER_RELIGIONS_DFF Religions Attributes	Manage Person	Dimension: Person Religion
PER_VISA_PERMIT Visa Permit Attributes	Manage Person	Dimension: Person Work Permit
Requisition DFF (attributes from IRC_REQUISITION_B)	Job Requisitions	Dimension: Job Requisition - Additional Details
Offer DFF (Attributes from IRC_OFFERS)	Job Offers	Dimension: Job Offer - Basic Information
Offer – Assignment DFF (from PER_ALL_ASSIGNMENTS_M DFF; ASS_ATTRIBUTE%)	Job Offers	Dimension: Job Offer - Assignment Details
DFF for referrals (under requisition – referrals, IRC_RF_REFERRALS_DFF)	Agency Portal Job Applications	Dimension: Job Requisition - Job Referrals

These are the extensible flexfields in HCM (Core HR and Payroll).



Extensible Flexfield Name and Code	Location in Oracle HCM Cloud	Location in Transactional Business Intelligence
PER_ASSIGNMENT_EIT_EFF	<ul style="list-style-type: none"> <li>Hire an Employee (Line Manager and HR Specialist) - Employment Information page, Assignment tab</li> <li>Hire an Employee (Line Manager and HR Specialist) - Employment Information Page, Contracts Region (Single Contract Single Assignment)</li> <li>Manage Employment (HR Specialist) - Assignment tab</li> </ul>	Dimension: Worker Assignment Details
PER_JOBS_EIT_EFF	Manage Jobs	Dimension: Job
PER_JOBS_LEG_EFF	Manage Jobs	Dimension: Job
PER_LOCATION_INFORMATION_EFF	Manage Locations	Dimension: Worker Location
PER_LOCATION_LEG_EFF	Manage Locations	Dimension: Worker Location
PER_ORGANIZATION_INFORMATION_EFF	Manage Departments	Dimension: Department
PER_PERSON_EIT_EFF	Manage Person	Fact - Person
PER_POSITIONS_EIT_EFF	Manage Positions	Dimension: HR Position
PER_POSITIONS_LEG_EFF	Manage Positions	Dimension: HR Position
Action Occurrence EFF (PER_ACTION_OCC_EIT_EFF)	Manage Employment	Dimension: Assignment Action Occurrence Details

### Related Topics



# 4 Analyses, Reports, and Dashboards Modification

## Overview of Creation and Administration of HCM Analytics and Reports

You can use the predefined analyses, dashboards, and reports to help you meet business intelligence requirements. You might want to edit them or create ones for your own purposes. If you have the appropriate roles, you can modify analytics and reports and make

### Setup and Administration

As an implementor or administrator you can:

- Secure access to customer-defined analytics and reports.
- Archive and move customer-defined analytics and reports from one environment to another.

For more information about security tasks, see Oracle Applications Cloud: Administering Analytics and Reports

#### *Related Topics*

- [Create and Modify Analyses and Dashboards](#)
- [How You Create and Edit Reports](#)
- [How You Take Advantage of Sample Reports](#)

## Analyses and Dashboards

### How Data Is Structured for Analytics

The business intelligence (BI) repository contains the metadata that defines which columns you can include in analyses, and the source of that data. The repository is organized into subject areas, which contain folders with the columns.

**Note:** You can also use the BI repository as a data source for reports.

### Columns

This table describes the three types of columns available when you create or edit analyses.

Column Type	Description	Example
Fact	Provides a measure of something, meaning that the values are numbers.	Total
Attribute	Represents a piece of information about a business object, with values that are dates, IDs, or text.  <b>Note:</b> Attribute columns can be flexfield segments imported into the BI repository.	Start Date
Hierarchy	Holds data values that are organized in a hierarchical manner.	Time, with sublevels: <ul style="list-style-type: none"><li>• Year</li><li>• Quarter</li><li>• Month</li></ul>

## Subject Areas

When you create an analysis, you first select a subject area, which contains columns related to a specific business object or area. Then, open folders within the subject area to find the columns to include.

For product families that use Application Composer, you can create custom subject areas to accommodate custom objects or to add new facts for analysis.

## Folders

Each subject area has one fact folder and a number of dimension folders. Folders can have subfolders.

- **Fact folders:**
  - Contain fact columns.
  - Are usually the last in a list of folders and are usually named after the subject area.

- **Dimension folders:**

- Contain attribute and hierarchical columns.
- Are joined to the fact folder within a subject area.

For example, if your analysis has the Currency attribute from a dimension folder, you see currencies in the results. If you also add the Total fact, then your analysis includes only records with both a currency and a total amount. The more columns you add, the smaller the query set for your analysis.

- Can be common folders, or common dimensions, that appear in more than one subject area.

If your analysis has columns from multiple subject areas, then you:

- Should include columns only from dimension folders that are common to all of those subject areas. At least one such column is required.
- Must include one column from the fact folder in each of those subject areas.

#### *Related Topics*

- [Create and Edit Analyses Using a Wizard](#)
- [Create and Modify Analyses and Dashboards](#)
- [Manage Analytics with Advanced Features](#)
- [About Custom Subject Areas](#)

## Create and Edit Analyses Using a Wizard

Use the wizards to quickly create and edit your analyses. You can use a wizard to create and edit most of your analytics, for example to select columns, add filters or views.

You can also use advanced business intelligence features to create or edit dashboards or manage analyses and other objects in the catalog.

1. Start the wizard from the Reports and Analytics work area or the Reports and Analytics panel tab (if available).
  - To create a new analysis click **Create** and select **Analysis**. Select a subject area for your analysis and click the **Continue** button.
  - To edit an existing analysis, in the Reports and Analytics work area, select it in a folder or the favorites list, click its ellipsis icon and select **Edit**. In the Reports and Analytics panel tab, click the analysis, then click **Edit**.
2. In the Select Columns page, optionally, click **Add/Remove Subject Areas** and, in the Add/Remove Subject Areas dialog box, select more subject areas or remove any that you no longer need, and click **OK**. You can't remove the original subject area selected for the analysis. To remove any other subject area, first remove its columns from the analysis.

3. From here on, make selections in a series of analysis-definition pages, selecting Next or Back to navigate among them.
  - In the Select Columns page, expand your subject area and folders within it to choose the columns to include in your analysis. Also set options for those columns.
  - In the Select Views page, determine whether your analysis is to include a table, a graph, or both. For either, select among several types. If you include both, select the order in which they appear.
  - In Edit Table and Edit Graph pages, select options that apply to your table and graph layouts. Each of these pages is active only if you selected the item it applies to in the Select Views page.
  - In the Sort and Filter page, optionally apply filters to columns to refine the selection of records in your analysis, and apply sorts to them to order your results.
  - In the Highlight page, optionally add color highlights based on numeric thresholds you set.
  - In the Save page, enter a name for the analysis, select a catalog folder to save it in, and click **Submit**.

In general, these pages are designed so that procedures for using them are readily apparent. Even so, here are some things you will want to know.

## Select Columns Page

For each column in your analysis, you select an Interaction option.

- Two of the options, Default and Drill, do the same thing: If you click on a column header, the analysis adds a column displaying values at the next hierarchical level. (For example, if you click on Control Name, the analysis adds a Control ID column.) If you click on a column value, the analysis adds the subordinate column, but also filters to display only records containing the value you clicked.
- Navigate to Transaction: If you click on a value from a column for which this option is set, the analysis presents a link to the record of an object the value applies to.

For such links to work, however, further configuration is required: You need to define paths to the records that are to be opened. If you want to use this option, you're probably better off creating the analysis in the BI Catalog. However, you can create it in the wizard, then edit it in the BI Catalog. See the topic titled Link Analyses to Application Pages.

- None: This option in effect turns the Default option off and turns nothing on. Nothing happens if you click on a value in a column for which this option is set.

For each column, you can also select a Hidden option. This prevents the analysis from displaying the column, but leaves its values available for use behind the scenes, for example in filters.

## Select Views Page

You can add a graph to your analysis only if it includes at least one column from a fact folder. (You can include a table in your analysis no matter what columns you select for it.) A fact column contains numeric values, such as counts of incidents returned by advanced controls. Other columns contain attributes of objects, such as names of advanced controls. Without numeric values, there's nothing to base a graph on.

You can create a title for the analysis in this page, but doing so is optional. You also create a name for the analysis in the Save page, and that one is required. If you create both, the analysis displays both; they don't have to be the same.

You can use a Preview option to ensure the analysis returns data you expect. Turn it on or off in this page or in subsequent wizard pages. Once it's on, the preview remains on in other wizard pages you navigate to, unless you turn it off.

## Edit Table Page

Here are the layout options you can select for tables:

- **Columns:** This is the default. Each column you assign this value to appears as a column in the table.
- **Prompt For:** In a prompt field, you select among values from the column you're configuring. For example, you would select a date if the column were Calendar Month Start Date. The table would then display only rows containing the value you selected.
- **Section By:** The table is divided into sections. Each value of the column you're configuring becomes a header, and the section beneath each header includes rows containing that value.
- **Excluded:** The column you select is no longer available to the view you're configuring. The column is hidden, and its values are unavailable for behind-the-scenes tasks such as filtering. However, the column remains available to other views in your analysis.

## Edit Graph Page

You can't apply layout options to fact columns. For other columns, graph layout options include Prompt For, Section By, and Excluded, which have the same effect as they do in tables. You can also apply these options in graphs:

- **Vary Color By:** Each value in the column you're configuring is represented by a distinct color in the graph.
- **Group By:** Values in the columns you assign this option to are combined in the graph. For example, if you select this option for the State and Calendar Month Start Date columns in a bar graph, each bar represents a particular status on a particular date.

## Highlight Page

You can use this feature only if your analysis includes at least one fact column, and you can apply it only to fact columns.

### Related Topics

- [View Analytics, Reports, and Dashboards](#)
- [Where to Save Analytics and Reports](#)
- [How Data Is Structured for Analytics](#)
- [Manage Analytics with Advanced Features](#)

# Analytics Modification

## Cross Subject Area Joins

### Overview of Cross-Subject Area Joins

You can create analyses that combine data from more than one subject area, or cross-subject area analyses. Review guidelines for creating these joins in MyOracle Support (Doc ID 1567672.1). Cross-subject area analyses can be classified into three broad categories:

- Using common dimensions.

- Using common and local dimensions.
- Combining more than one result set from different subject areas using set operators such as union, union all, intersection and difference.

## Common Dimensions

A common dimension is a dimensional attribute that exists in all subject areas in the analysis. These dimensions are considered common dimensions between subject areas and can be used to build a cross-subject area report.

## Common and Local Dimensions

A local dimension is available only in one of the combined subject areas in a cross-subject area query.

### Related Topics

- [Create a Cross-Subject Area Analysis](#)

## Create a Cross-Subject Area Analysis

To create a cross-subject area analysis, include a measure from each subject area to support the join if it uses a local dimension. You can hide the measure in the results if you don't want it to appear in your analysis.

## How to Create a Cross-Subject Area Analysis

1. In the Reports and Analytic work area, click **Browse Catalog**.
2. Click **New** and select **Analysis**.
3. Select a subject area.
4. In the Criteria tab, expand the dimensions and add a column to the analysis.
5. In the Subject Areas region, click **Add/Remove Subject Areas**.
6. In the Subject Area region of the Criteria tab, expand the dimensions and add a column to the analysis.
7. If the column is a local dimension, add a measure from the subject area. In any join query, you must add at least one measure from all subject areas involved, otherwise unexpected results or errors might occur. If it's preferable to hide the measure in your analysis, select its Column Properties, and in the Column Format tab of the Column Properties dialog box, select the **Hide** check box and click **OK**.
8. If you're using a local dimension, in the Advanced tab, navigate to the Advanced SQL Clauses section, select **Show Total value for all measures on unrelated dimensions**, then click **Apply SQL**.
9. Click the **Results** tab to see the analysis results.
10. Click the **Criteria** tab again to return to the analysis definition.

### Related Topics

- [Overview of Cross-Subject Area Joins](#)

## Effective-Date Reporting for HCM

The ability to report as of a specific date depends on whether you're reporting on event-type measures or non-event type measures.



## Event-Type Measures

Event-type measures in Transactional Business Intelligence are those that include a time dimension, or specific date associated with them. Examples include assignment events, absences, and performance. Because these measures have specific dates associated with them, you can run queries against them as of a specific date. You can produce trend reports for any subject area that has the time dimension, meaning any subject area that contains event-type measures.

## Non-Event Type Measures

Non-event type measures don't have a specific date associated with them. Examples include headcount and salary. Transactional Business Intelligence is designed to report on non-event measures as of the current date. To report on non-event measures as of a specific date, add a prompt for the date to your analysis. And, add this SQL statement to the analysis: `SET VARIABLE PARAM_EFFECTIVE_DATE='{AsOfDate}';`

## Refresh Manager Hierarchies

You need to regularly refresh manager hierarchies to view the latest hierarchical data.

Sometimes you might be unable to render the latest hierarchical data using any of the dimensions based on managerial hierarchies, as a manager. The primary reason could be the missing refresh of the respective hierarchies.

HCM OTBI subject areas have multiple hierarchical dimensions related to supervisors and workers. Each of the hierarchies have their own usage in various contexts.

The list of managerial and assignment hierarchies includes the following:

1. Assignment Manager
2. Assignment Manager (Unsecured)
3. Assignment Manager List
4. Assignment Manager List (Unsecured)
5. Matrix Manager
6. Parent Managers

You need to run the Refresh Manager Hierarchy process to populate the data to report using the hierarchical dimensions in OTBI. This process needs to be run every time there's a change in the worker and supervisor hierarchy.

## Run Refresh Manager Hierarchy Process

An additional parameter has been added to the screen, by which the process can be flagged to run. Depending on the hierarchies, you intend to use, you could schedule either 1 or 2 ESS jobs, such as:

1. Populate assignment list dimensions
2. Populate other assignment manager dimensions

The method to run this process has been changed starting from the release 18.10. The name of the process and the steps to invoke is the same as earlier releases and is listed below.

1. From the navigator, go to **Tools > Scheduled Processes > Schedule New Process**.
2. Choose **Refresh Manager Hierarchy**, click **OK**.

**Note:** The rule to populate the hierarchies differs based on the value you enter while running the process.

3. To populate the Assignment Manager List dimensions, you need to have the column value blank or specify a positive integer in the **Updated within the last N days** column, as shown.

Scenario	Updated Within the Last N Days	Description
Full Refresh	Null/blank	This does a full refresh of the following manager hierarchies: <ul style="list-style-type: none"> <li>a. Assignment Manager List</li> <li>b. Assignment Manager List (Unsecured)</li> <li>c. Parent Managers</li> </ul>
<Positive Integer>	Example: 5	The hierarchies are refreshed with all the changes that have happened in the last 5 days.

**Note:** If there's already a schedule for the Refresh Manager Hierarchy process to run with blank or positive value, then continue with the same for populating data into Assignment manager list dimensions

4. When you enter the value as 0 in the **Updated within the last N days** column and submit, the process runs and does a full refresh of only the below mentioned hierarchies without doing changes to the remaining hierarchies related to manager/worker.
  - a. Assignment Manager
  - b. Assignment Manager (Unsecured)
  - c. Matrix Manager
5. When you enter a negative value such as -1 in the **Updated within the last N days** column and submit, the process runs and updates the changes from the last 1 day, to the below mentioned hierarchies without doing changes to the remaining hierarchies related to manager/worker.
  - a. Assignment Manager
  - b. Assignment Manager (Unsecured)
  - c. Matrix Manager

## How You Create a Date-Effective Headcount Analysis

Here's how you create a report with effective-date reporting capability for a nonevent measure. The nonevent measure in this example is headcount. You want an analysis to review headcount by department, but headcount isn't a specific event. Using the Workforce Management - Worker Assignment

Here are the key decisions for this scenario.

Decisions to Consider	In This Example
Which subject areas are needed?	Workforce Management - Worker Assignment Real Time
Does the analysis require an SQL statement?	Yes. An SQL statement is needed for the effective date capability.

## Create a Date-Effective Analysis for Headcount

1. Navigate to the Reports and Analytics pane
2. Click **Browse Catalog**.
3. Click the **New** menu, and select **Analysis**.
4. In the Select Subject Area window, select the **Workforce Management - Worker Assignment Real Time** subject area.
5. In the Subject Areas region of the Criteria tab, expand the **Worker Assignment** folder.
6. Select **Headcount** and drag it to the Selected Columns region.
7. Expand the Department folder, select **Name**, and drag it to the Selected Columns region.
8. Select the **Prompts** tab.
9. On the right side of the page on the Prompts tab, click **New** and select **Variable prompt**.
10. In the New Prompt window, leave the value of Presentation Variable in the **Prompt for** field, and enter **AsOfDate**.
11. In the **Label** field, enter Workers as of (mm/dd/yyyy).
12. Expand the Options region.
13. In the Variable Data Type menu, select **Date**.
14. Select the **Require user input option**.
15. Select **Dynamic** for the Text Field Width.
16. Click **OK**.
17. Select the **Advanced** tab.
18. On the Advanced tab, scroll down to the Advanced SQL Clauses region.
19. In the **Prefix** field, enter SET VARIABLE PARAM\_EFFECTIVE\_DATE='{AsOfDate}';
20. Click **Apply SQL**.
21. Click **OK** to clear the message.
22. Click **Save Analysis**.
23. In the Save As window, select **My Folders** and enter Date-Effective Headcount in the Name field.
24. Click **OK**.
25. At the top of the page, click the **Home** link to return to the OTBI EE home page.
26. Locate your report in the Recent region.
27. Click **Open**.
28. In the **Workers as of mm/dd/yyyy** field, enter an effective date in the proper format.
29. Click **OK**.
30. Review the results in the Headcount field.

## Cross-Subject Area Analyses

### Cross-Subject Area Analyses

You can create analyses that combine data from more than one subject area. This type of query is referred to as a cross-subject area analysis. Cross-subject area analyses can be classified into three broad categories:

- Using common dimensions
- Using common and local dimensions
- Combining more than one result set from different subject areas using set operators such as union, union all, intersection, and difference.

## Common Dimensions

A common dimension is a dimension that exists in all subject areas that are being joined in the report. For example, Workforce Management - Worker Assignment Real Time and the Workforce Management - Worker Assignment Event Real Time subject areas have Worker, Job, and Department available. These dimensions are considered common dimensions between these two subject areas and they can be used to build a cross-subject area report.

## Common and Local Dimensions

The Worker Assignment Details dimension in the Workforce Management - Worker Assignment Real Time subject area isn't available in the Workforce Management - Worker Assignment Event Real Time subject area. Therefore it's a local dimension for the purposes of a cross-subject area query between these two subject areas.

### Related Topics

- [How To Create a Cross-Subject Area Analysis for HCM](#)

## How To Create a Cross-Subject Area Analysis for HCM

Here's how to create a real-time analysis that includes more than one subject area, which is referred to as a cross-subject area analysis. In this example, you create an analysis of headcount by department with the annualized salary in the local currency.

These are the key decisions for this scenario.

Decisions to Consider	In This Example
Which subject areas are needed?	For headcount by department, select Workforce Management - Worker Assignment Real Time. For salary, select Compensation - Salary Details Real Time.
Does the analysis require an SQL statement?	Yes, to join the two subject areas.

## Create a Cross-Subject Area Analysis

1. In the Reports and Analytics work area, click **Browse Catalog**.
2. Click **New** and select **Analysis**.
3. In the Select Subject Area window, select the **Workforce Management - Worker Assignment Real Time** subject area.
4. In the Subject Area region of the Criteria tab, expand the Department folder.
5. Click **Name** and drag it to the Selected Columns area.
6. Expand the Worker Assignment folder.
7. Click **Headcount** and drag it to the Selected Columns area to the right of the Department Name column.
8. In the upper-right corner of the Subject Areas region, click **Add/Remove Subject Areas**.
9. In the Add/Remove Subject Areas window, select **Compensation - Salary Details Real Time**.
10. Click **OK**.
11. In the Subject Areas region of the Criteria tab, expand the Compensation - Salary Details Real Time folder.
12. Expand the Salary folder.
13. Click **Annualized Salary** and drag it to the Selected Columns area to the right of the headcount column.
14. Click the **Results** tab to see the results of the analysis.

15. Click the **Criteria** tab again to return to the analysis definition.
16. In the Subject Areas region on the Criteria tab, expand the Salary Details folder in the Compensation - Salary Details Real Time folder.
17. Click **Apps Local Currency Code** and drag it to the Selected Columns area to the right of the Annualized Salary column.
18. Click the **Results** tab to view the report again. The headcount column is now blank.
19. To correct the blank headcount, click the **Advanced** tab.
20. On the Advanced tab, scroll down to the Advanced SQL Clauses region.
21. Select the **Dimension** check box.  
When you select this check box, the logical SQL is appended with the following request variable value, enabling you to join the two subject areas: SET VARIABLE ENABLE\_DIMENSIONALITY = 1;
22. Click **Apply SQL**.
23. In the Message from Web page window, click **OK**.
24. Click the **Results** tab again to see that the headcount column now has numbers.
25. Click **Save Analysis**.
26. Save to My Folders, and enter Headcount by Department in the **Name** field, and enter a description for your analysis.

## Create a Cross Subject Query with a Date Prompt

Here's how you can create a cross subject area query that includes a date prompt.

Create a Workforce Management - Worker Assignment Real Time analysis.



## Create a Cross Subject Query with a Date Prompt

1. Start in Oracle Transactional Business Intelligence
2. Click **Create** and select the Workforce Management - Worker Assignment Real Time subject area.
3. Expand the Worker subject area. Add the Person Number and Name columns.
4. Select Name and First Name.
5. Select the **Filter** icon.  
You only want to view active workers, so add the Assignment Status Type Code column.
6. Choose **More Columns**.
7. Choose **Assignment Status Type Code** and click **OK**.
8. Set the Operator to **is not equal to/is not in**. Then, add a filter so only Active workers are displayed.
9. Set the Value to Inactive and click **OK**
10. Click the **Results** tab.
11. Click the Table Properties icon. Enable Content Paging to show the scroll bars on your report, then return to the Criteria tab.
12. Select **Content Paging** and Click **OK**.
13. Return to the **Criteria** tab.
14. Collapse the Worker Subject Area. You must cross subject areas to include a measure from every subject area. So, in this case, pull in the Assignment Count column.
15. Expand the Worker Assignment Subject Area and select Assignment Count.
16. Return to the **Results** tab. Now view the results.
17. Return to the **Criteria** tab. The assignment count is all 1's. We don't need to see that, so we'll hide it.
18. Select the Settings icon in the Assignment Count column
19. Choose **Column Properties**.
20. On the **Column Format** tab, choose **Hide**.

21. Click **OK**.
22. Click the Results tab. Return to the Results tab. Although the criteria is still considered for the report, it's no longer displayed.
23. Click the **Criteria** tab. Return to the Criteria tab.
24. Collapse the Workforce Management Worker Assignments Subject area
25. Click the Add/Remove Subject Area icon Now add the second subject area.
26. Add Compensation - Salary Details Real Time
27. Click **OK**.
28. Expand Compensation Salary Details Real Time, because you need a measure for every subject area, add Annualized Full-Time Salary.
29. Expand Salary and choose Annualized Full-Time Salary.
30. Click the **Results** tab. The result is a cross-subject area query that includes annualized full-time salary.  
Note that some people don't have a Salary.
31. Click **Advanced** tab. Next, set the query to be effective as of a specific date.
32. Paste the following code in the Advanced SQL Clauses Prefix area:  

```
SET VARIABLE PARAM_EFFECTIVE_DATE='{ @ P_DATE }{@system.currentTimeMillis} [yyyy-MM-dd] }';
```

This code sets a variable called Param\_Effective\_Date to a value of PA\_DATE, which we haven't defined yet. If a PA\_DATE isn't set, then the current date and time are used. If there's no parameter, it will use the code date time.
33. Click **Apply SQL**.
34. Click the **Results** tab. View the results. Notice that the report, displays the same results because it's using the same effective date.
35. Click the **Prompts** tab. So, set up a prompt to provide the effective date.
36. Choose **Create a Variable Prompt**.
37. Edit the new prompt as follows:
  - a. Prompt variable: P\_Date
  - b. User Input: Choice list
  - c. Choice list values: All Column Values
  - d. Column: Select any date value such as Worker Person Date of Birth.
  - e. In the Default Selection SQL results statement area, enter: select current\_date from **Workforce Management – Worker Assignment Real Time**. Assign a variable prompt called P\_DATE and label it Effective Date.
38. Click **OK**
39. Edit the prompt again to change the User Input from Choice List to Calendar and click OK. Here's what the Effective Date Prompt will look like.
40. Click **Save** to save your prompt as Date Prompt.
41. Choose **Date Prompt**.  
Click **OK**.
42. Click the **Catalog** tab.  
Now test the date prompt.
43. Click **Date** prompt. The report is updated to reflect the new date.

## Create Optimized Cross Subject Area Reports using Static Filters

Use static report filters to build optimized HCM OTBI cross subject area reports.

Some cross subject area reports may be costly in terms of response time, if they're not designed correctly. It's recommended you use at least -

- One common dimension
- One measure from each of the participating subject areas
- Some filters on common dimension attributes for cross subject area OTBI reports.

In addition to the above three recommendations, you can improve the performance of the cross subject area reports, using this technique which:

- Encapsulates the report-filtering logic in a dashboard prompt that generates a list of desired assignment\_id values
- Executes the cross subject area report for these specific assignment\_id values.

Let's look at the tasks required to create this optimized cross subject area reports

- Push the static report filters in a dashboard prompt
- Fetch the list of assignment identifiers using the prompt's definition
- Pass these assignment identifiers back to the main report
- Data in main report is filtered on assignment identifiers

**Note:** In case of cross subject area reports, each single subject area physical SQL gets filtered on the selected assignment identifiers, thereby improving the overall performance of the cross subject area report.

### Before you start

You need to build the following WebCat objects:

1. Separate report that has only filtering logic
2. Hidden prompt based on report's filter
3. OTBI HCM Report.

### Create Separate\_Report that has only filtering logic

1. Review your current OTBI report's filters
2. Build a separate report, which has the same filtering logic, as used in your report.
3. Define filters on common dimension columns such as Worker, Job, Grade, Dept, and more.

**Note:** You need to include the "Worker"."Assignment\_ID" column.

For example: If your original report has filters on Country\_Code and System\_Person\_Type, then use the same filters in the Separate\_Report.

### Define Hidden Prompt

1. Define a column prompt: "Worker"."Assignment Identifier"
2. In **Check Boxes Values**, select **SQL Results**, which is the default selection.

View the sample Logical\_SQL associated with this prompt.

```
SELECT  
"Worker"."Assignment ID"
```

```
FROM "Compensation - Salary Details Real Time"
WHERE
  ((DESCRIPTOR_IDOF("Worker"."System Person Type") = 'EMP')
  AND ("Location"."Country Code" <> 'US'))
FETCH FIRST 65001 ROWS ONLY
```

## OTBI HCM report

**Note:** In the **Criteria** tab, set the **Assignment Identifier** as **is marked**.

View the Logical\_SQL definition of a cross-SA report with three subject areas:

```
SELECT
  0 s_0,
  "Business Unit"."Business Unit Name" s_1,
  "Grade"."Grade Name" s_2,
  "Job"."Job Name" s_3,
  "Location"."Worker Location Name" s_4,
  "Salary Basis"."Salary Frequency" s_5,
  "Salary"."Salary Currency" s_6,
  "Worker"."Assignment ID" s_7,
  "Worker"."Employee Name" s_8,
  "Worker"."Person Number" s_9,
  DESCRIPTOR_IDOF("Business Unit"."Business Unit Name") s_10,
  DESCRIPTOR_IDOF("Job"."Job Name") s_11,
  DESCRIPTOR_IDOF("Salary Basis"."Salary Frequency") s_12,
  "Salary"."Annualized Salary" s_13,
  "Workforce Management - Person Real Time"."Person"."Person Count" s_14,
  "Workforce Management - Worker Assignment Real Time"."Worker Assignment"."Head Count" s_15
FROM "Compensation - Salary Details Real Time"
```

## Hide the Prompt

1. Select Page setting > Hide the Prompt
2. Edit Dashboard > page 1 > Section 1 > Wheel icon > Format Section > Custom CSS Style Options (HTML Only) > Use Custom CSS Style:Display:none

# Reports Modification

## Overview of Analytics Publisher

Oracle Analytics Publisher enables you to author, generate, and deliver all types of highly formatted documents and operational reports.

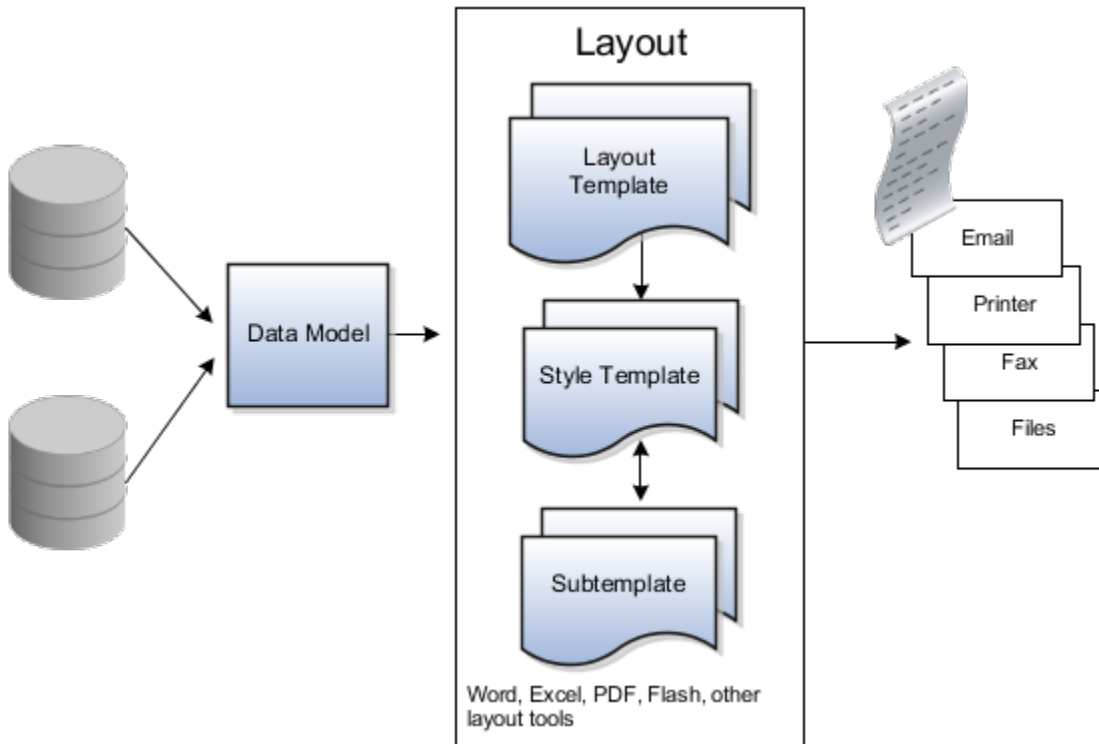
You can use familiar office desktop tools to create rich text format (.rtf) documents and reports against any data source. You can view reports, schedule them to run, and distribute them to predefined destinations.

Reports consist of one or more .rtf layouts, a reference to a data model, and a set of properties. A report may also include style templates and subtemplates, which allow reusability of functionality and maintain consistency of design. In the logical architecture depicted in the figure, the report includes a data model and a layout, and the layout references two style templates in the catalog which in turn reference subtemplates.

In the Analytics Publisher logical architecture, the data model accesses data sources and the layout and its optional style template and subtemplates determine the formatting of the report output, which can include email, print, fax, or files, and others. The layout is designed using common office



applications, for example Microsoft Word and Excel and Adobe Acrobat and Flash, among others.



## How You Access and Modify Report Components

To create or edit reports, you must access the business intelligence (BI) catalog. In the catalog, objects of type Report represent the report definition, which includes report properties and layouts.

Data models are separate objects in the catalog, usually stored in subfolders called Data Models.

### Accessing the BI Catalog

You can access the BI catalog in any of the following ways:

- In the Reports and Analytics work area, click **Browse Catalog** to open the BI catalog, and find your report or data model in the Folders pane.
- In the Reports and Analytics work area, find your report and select **More** to go to the report directly in the catalog. The data model associated with the report should be in the Data Models subfolder within the same folder as the report.
- Sign in to the application directly (for example: <http://host:port/analytics/saw.d11>) to open the catalog.
- Sign in to the Analytics Publisher server directly (for example: <http://hostname.com:7001/xmlpserver>) to open the catalog.
  - Alternatively, once you are in the catalog using another method, for example, through the Reports and Analytics work area, change the final node of the URL. For example, change (<http://host:port/analytics/saw.d11>) to `xmlpserver`. So the URL you use would be: <http://host:port/xmlpserver>.

## Predefined Reports

A special Customize option is available only:

- For predefined reports, not data models.
- Through direct access to the server using the `/xmlpserver` URL. When you find your report in the BI catalog, select **Customize** from the **More** menu.

The Customize option automatically creates a copy of a predefined report and stores it in the **Shared Folders > Custom** folder within the catalog. The new report is linked to the original, so that when users open or schedule the original, they are actually using the copied version.

If you don't have access to the Customize option or don't want the original version linked to the new report, make a copy of the predefined report and save it in the Custom folder.

## Predefined Data Models

Don't edit predefined data models. Instead, copy the data model into the Custom folder and edit the copy. You can't create a new data model based on the transactional tables.

### Related Topics

- [Where to Save Analytics and Reports](#)
- [What happens to modified analytics and reports when a release update is applied?](#)

## Create a Custom Job Role for OTBI Reporting Access

You can create a custom job role that provides access to OTBI and a data role that leverages this job role, which provides access to all the data in OTBI.

You can assign this data role to the user. Using this role, a user cannot view the data in the Cloud HCM application.

Here's how you can create the relevant roles and the user who can report with the OTBI reporting access.

1. From the home page, navigate to **Tools > Security Console > Create Role**.
2. Create a custom job role. Enter all the basic information for the role such as role name, description and and click **Next**.

**Note:** Do not modify a predefined role. Make a copy of the predefined role and edit that copy.

3. Add the required subject area duty roles in the **Role Hierarchy** tab.

**Note:** You do not have to add anything in the **Function Security Policies** and **Data Security Policies** tabs manually.

4. Save and submit this job role.

**Note:** You can also add BI Author role to this job role in the Role Hierarchy tab if you want the user to create OTBI analysis. If you do not add BI Author role you would get view only access.

Create a new data role based on this job role you created in the above steps.

5. Under **Data Role**, select **Data Roles and Security Profiles**.

6. Enter the data role description and click **Next**.
7. In the **Security Criteria** tab, provide **View All** access to all security profiles.

Click **Save** and **Submit**.

8. Create a new user and assign this data role created in the above step

**Note:** The user created need not be a Fusion user. It can be anyone who requires reporting only access and needn't be a worker in the organization. Example: A consultant who helps developing OTBI catalog.

9. Run the process: **Import User and Role Application Security Data**
10. Login to the application, using this newly created user.

**Note:** This user has access to **Report and Analytics** but has no access to any other application in the UI.

- Navigate to OTBI from **Reports and Analytics** app.
- Run the **OTBI Analysis**
- Create a new **OTBI Analysis**

## Where to Save Analytics and Reports

You save analyses, dashboards, and reports in the catalog, along with other objects like prompts and filters.

Besides the hierarchy of folders organized by product family, another important folder is Custom, found in Shared Folders. This is where you save the analytics and reports you create or edit for others to use.

### Shared Folders and the Custom Subfolder

Anyone with the correct access can get to objects stored in Shared Folders. If you have the appropriate roles, you can save in Shared Folders so that your objects are available for other users. You should save objects in the Custom subfolder, and use the product family subfolders to organize and publish analytics and objects for the correct audiences.

Here are a few things to know while working with analytics in the catalog. Keep all modified analyses and reports in the Custom folder. Directly edit predefined analytics only when it's necessary to make sure that any references to the analysis or dashboard still work properly.

- Preserve modified predefined objects during updates, which can make changes to predefined analytics, reports, and other objects outside the Custom folder. You might lose changes saved outside the Custom folder during updates.
- You can easily find modified objects if they're not spread around the catalog.
- You can edit objects in the Custom folder without compromising security on the original objects.
- For predefined reports only, you can use a special **Customize** option to copy the report and also the folder structure and permissions. The copy is linked to the original, so editing the copy is like directly editing the original.

When you copy an object into the Custom folder, the copied object inherits the permission settings of the Custom folder. An administrator can reset the permissions on the object and the folder that it's in.

**Note:** When you create folders in the catalog, don't use special characters (~, !, #, \$, %, ^, &, \*, +, ` , |, :, " , \, <, >, ?, ,, /) in their names.

## My Folders

My Folders is your personal storage; you're the only one who can access anything that you save there. What you save there is available in the Reports and Analytics work area, but not in My Folders in the Reports and Analytics panel tab on any other work area. But an exception is when you create an analysis using the wizard in the Reports and Analytics work area. If you save a wizard analysis in My Folders, it's available in any panel tab that appears in any work area.

**Note:** Don't store analyses or reports in the predefined Temp folder in My Folders. That folder is used by Analytics Publisher and purged automatically every 24 hours.

## Create Folders

Create folders in Custom or My Folders.

To create folders:

1. In the catalog, navigate to the desired location of the new folder in the Folders pane.
2. In the catalog toolbar, click **New**, and select **Folder**.
3. In the New Folder dialog box, enter the folder name, and click **OK**.

## Automatically Created Folders

If conflicts are detected during upgrade, folders named backup\_nnn are automatically created in the catalog. After reviewing and resolving any conflicts, Oracle recommends that you manually delete the backup folders from the catalog. You can contact your help desk to request an automated removal if you have many folders to delete.

### Related Topics

- [What happens to modified analytics and reports when a release update is applied?](#)

## What happens to modified analytics and reports when a release update is applied?

Updates don't affect the Custom folder or My Folder in the catalog, anything saved there is preserved in updates.

This includes analytics and reports you edited or created. But anything saved outside those folders, in the predefined catalog, is preserved only if the update doesn't include a new version of those objects.

If an update includes a new version of a predefined object that you edited outside the Custom folder, the changes you made are saved as a new object. The new version from the update overwrites the existing predefined object. And a copy of the existing object (with your edits) is automatically created in the same folder, with a new name that indicates it's a new version.

If the update includes a new version of both the predefined object and a folder in its file path, the new folder name, along with the new version of the object, overwrites the existing predefined folder and object. And a copy of the existing folder (along with your edited object) is automatically created. The folder is renamed to indicate that it's a new version, but your edited object isn't renamed.

If folders named backup\_nnn are automatically created in the catalog due to conflicts, after reviewing and resolving any conflicts, Oracle recommends that you manually delete the backup folders from the catalog. You can contact your help desk to request an automated removal if you have many folders to delete.

**Note:** Future updates won't affect renamed objects or anything within a renamed folder.

## How You Take Advantage of Sample Reports

Here's how to create an analysis using a sample report from Customer Connect.

After you find and download a sample report from Customer Connect you can use it in Business Intelligence. You can download a catalog file that may contain multiple reports or the XML source for a report.



### Find Sample Reports

First, go to the Customer Connect website and login. You must register if you don't already have an account.

1. Go to <https://cloudcustomerconnect.oracle.com> and enter your user name and password.
2. On the Customer Connect Home page, click **Categories > Reporting and Analytics > HCM Report Sharing Center**.
3. In the Shared Reports list, scroll down and select a report. You can see details about each report as well as a view to confirm which report to use.  
For example, you can select **Headcount by Age Band** or use the search option to search and view this report.
4. Click the **Headcount by Age Band.catalog** link in the **Search Results**.
5. Click the link **Headcount by Age Band.catalog** below the image of the report to download it.

### To use a Catalog Report

Once you have located and saved a catalog file, you can upload it to Business Intelligence. Have Business Intelligence open in another tab.

1. In the Folders section, click **My Folders**.
2. In the Tasks section, click **Unarchive**.
3. Click **Browse**, and navigate to the catalog file.
4. Click **Open**.  
Place your analysis in My Folders or in the Custom folder under Shared Folders. If you place the analysis anywhere else it will be lost in the next upgrade.
5. In the list of reports, find the name of the report you want to use and click **Open**.

### Use an XML Report

In Customer Connect, you can use keywords to search for a report. Once you have downloaded the report, you place the content in Business Intelligence. Have Business Intelligence open in another tab.

1. In Customer Connect, click the **HCM Report Sharing Center** tab.
2. In the **Keywords** field, enter **workforce trend** or other search term.
3. Press **Enter**.
4. Click a report name link to view details and then download it from that page, or click the XML file name to download it from the list of **Posts**.
5. Click **OK**.
6. Open the file you downloaded in Notepad, select all of the content, and copy it to the clipboard.  
You can use Ctrl+A and Ctrl+C.

7. Switch tabs to Business Intelligence. In the Catalog toolbar, click **New** and choose **Analysis**.
8. Select a subject area. For example, **Workforce Performance Rating Distribution**.  
You can choose any subject area ending in Real Time.
9. Click the Advanced tab and press Ctrl+A to select all existing code. Press Delete.  
Make sure you delete all of the existing code before pasting the new code.
10. Press Ctrl+V to paste the content from Customer Connect.
11. Click **Apply XML**.
12. To run the report, click the **Results** tab.  
You can edit the report, such as adding custom or flex fields if needed.
13. Click **Save**. Navigate to where you want to save the analysis within My Folders or in the Custom folder under Shared Folders.  
You must save the analysis in one of these locations to assure that the report is not lost during an upgrade.
14. Enter a name and optionally a description.
15. Click **OK**.

## How You Create an Advanced Report

You can follow the steps provided to create an advanced report.

Here's how you can create and save an advanced report:



1. From the OTBI home page, click **New > Analysis**.
2. Search for Worker Assignment and select the **Workforce Management – Worker Assignment Real-Time** subject area.
3. In the **Criteria** list, expand **Worker**, then search for and double-click **Person Date of Birth**.
4. Click to collapse the **Worker** criteria.
5. Click to expand **Worker Assignment**.
6. Double-click **Assignment Count**.
7. Click the **Results** tab. You can edit the formula to view the required results.
8. Click the **Criteria** tab. For the **Person Date of Birth** criteria, click the **Settings** icon and select **Edit Formula**.
9. Click the **Insert Function**.
  - a. Click to expand **Calendar/Date**.
  - b. Select **TimeStampDiff** and click **OK**.
10. To change the interval to year, in the **Column Formula** section:
  - a. Select interval and change to **sql\_tsi\_year**.
  - b. To change to current date in the formula, click to select **timestamp2**.
  - c. Click the **Insert Function**. In the **Functions** list, click to select **Current\_Date**. Click **OK**.
11. To change the column heading, in the **Column Heading**:
  - a. Click to select the **Custom Headings** option.
  - b. In the **Column Heading** field, enter **Age**. Click **OK**.

You can view all the current assignments by age.

12. To view the current assignments by age band:

- a. Click the **Results** tab, then click the **Criteria** tab.
- b. In **Worker** criteria, click the **Settings** icon and select **Edit Formula**.
- c. Click the **Bins** tab. Click **Add Bin**.

13. To select a specific age band, example: between 0- 25, do the following:

- a. Click the **Operator** drop-down list and select **is less than**. In the **Value** field, enter **25**.
- b. Click **OK**.
- c. In the **Edit Bin Name** field, enter 0-25. Click **OK**.
- d. Click **Add Bin**. Click the **Operator** drop-down list and select **is between**.
- e. In the first **Value** field, enter 25. In the second **Value** field, enter 45.
- f. Click **OK**.

14. In the **Edit Bin Name** field, enter 25-45. Click **OK**.

- a. Click **Add Bin**. Click the **Operator** drop-down list and select **is between**. In the first **Value** field, enter 46.
- b. In the second **Value** field, enter 65.
- c. Click **OK**.
- d. In the **Edit Bin Name** field, enter 46-65. Click **Add Bin**.
- e. Click the **Operator** drop-down list and select **is greater than**. In the **Value** field, enter 65. Click **OK**.
- f. In the **Edit Bin Name** field, enter 66+.
- g. In the **All other values** row, click the **Edit Bin Name** icon, for those who haven't entered any date of birth.
- h. In the **Edit Bin Name** field, enter **No Date of Birth**. Click **OK**.

15. Click **OK**.

You can now view the information by age bands.

16. To change the column heading: In the **Age** criteria, click the **Settings** icon and select **Edit Formula**.

- a. In the **Column Heading** field, enter **Age Band**. Click **OK**.
- b. Click the **Results** tab.  
You have a usable report in which the age bands appear in blue. You can click on the age band summary for more information. You can modify the settings to remove this ability.
- c. Click the **Criteria** tab.
- d. On the **Criteria** tab, click the **Age Band** settings icon and select **Column Properties**.
- e. Click the **Interaction** tab. In the **Column Heading** section, click the **Primary Interaction** drop-down list and select **None**.
- f. In the **Value** section, click the **Primary Interaction** drop-down list and select **None**.
- g. Click **OK**.
- h. Click the **Results** tab.

You can view the age bands report. You can also re-use the age bands in other reports.

1. Here are the settings to save the age band for re-using in other reports.

17. Click the **Criteria** tab.

- a. On the **Criteria** tab, click the **Age Band** settings icon and select **Save Column As**.  
As age band is based on the common Worker dimension, you can save it in a folder that's not specific to any subject area.
- b. In the **Folders** list, click to select the **Custom** folder. Click the **UP** icon.
- c. Click **OK**.  
You can drag the age band into any report you want to use, as long as the Worker dimension appears in one of the subject areas in the report.

18. In the **Catalogs** list, click to expand **Shared Folders**. Click to expand **Custom**.

19. Click to expand **Subject Area Contents**. Click the **Save As** icon.
20. In the **Folders** list, click to expand **HCM** and select **HCM Other Reports**.
21. In the **Name** field, enter **Age Band Summary**.
22. Click **OK**.

**Results:**

The report is saved and you can use it as required.

## Enhancing an Advanced Report

Here's how you can enhance an advanced report.

You can edit the advanced report to include specific views and graphs and switch between the views and graphs as per your requirement.



### Enhance an Advanced Report

1. On the **Criteria** tab, in the **Subject Area** section, expand **Worker Legislation** and double-click **Country**. Click the **Results** tab.
2. Click the **New View** drop-down and select **Pivot Table**.
3. In the **Table** section, click **Remove the View from Compound Layout**.
4. In the **View** section, with **Table** selected, highlight the **Add View** icon.
5. In the **Pivot Table** section, click the **View Properties** icon.
6. In the **Data Viewing** section, click to select **Content paging**.
7. Click **OK**. Click **Edit View**.
8. In the **Layout** section, drag the **Measure Labels** on the right above the **Age Band** cell. Click **Done**.
9. Click the **New View** drop-down and select **Graph > Bar > Stacked Horizontal**.
10. In the **Graph** section, click **Remove View from Compound Layout**.
11. In the **View** section, click to select **Graph** and highlight the **Add View** icon.
12. Click the **New View** drop-down and select **Other Views > Column Selector**. Click and drag the new **Column Selector** row under the title.
13. In the **Column Selector** row, click **Edit View**. In **Column 2**, click the **Include Selector** check box.
14. In the **Subject Area** section, click to expand **Worker Assignment** and double-click **Head Count**.
15. Click to expand the **Assignment Count** drop-down.
16. In **Column 3**, click the **Include Selector** check box.
17. In the **Subject Area** section, expand **Worker** and double-click **Person Gender**.
18. In the **Subject Area** section, expand **Business Unit** and double-click **Business Unit Name**. Click the **Country** drop-down.
19. In **Column 3, Business Unit Name**, click the **Column Properties** icon. Click the **Column Format** tab. Click **Cancel**. Click **Done**.
20. In the **Column Selector** section, click the **Country** drop-down and select **Person Gender**.
21. In the **Column Selector** section, click the **Assignment Count** drop-down and select **Head Count**.



22. Click the **New View** drop-down and select **Other Views > View Selector**.
23. Click and drag the new **View Selector** row under the **Column Selector** row. In the **Pivot Table** section, click **Remove View from Compound Layout**.
24. In the **Views** section, click to select **Pivot Table** and highlight the **Add View** icon. In the **View Selector** row, click **Edit View**.
25. In the **Available Views**, click **Graph** and then click the **Move** icon.
26. In the **Available Views**, click **Pivot Table** and then click the **Move** icon.
27. Click the **Graph** drop-down. Click to close the **Graph** drop-down. Click **Done**.
28. Click the **Head Count** drop-down and select **Assignment Count**.
29. Click the **Person Gender** drop-down and select **Business Unit Name**.
30. Click the **Graph** drop-down and select **Pivot Table**. Click **Save Analysis**.

A flexible report is created, where you can change the views between Head Count and Assignment Count, Gender and Country or Business Unit Name, and change the graph to a pivot table.

## Drilling to more Detail

You can drill to another OTBI analysis to view more detail in the advanced report created .



1. On the **Catalog** page, click to select the **Age Band Summary** report.
2. Click the **Copy** icon, then click the **Paste** icon.
3. In the **Catalog** list, click to select **copy of Age Band Summary**, then right-click and select **Rename**.
4. In the **Name** field, enter **Age Band Drill**. Click **OK**.
5. In the **Age Band Drill** row, click **Edit**. Expand the **View** section vertically and horizontally and remove some of the features not required for a list report.
6. In the **View** section, click to select **Table** and then click **Add View**.
7. Click the **Criteria** tab. In the **Assignment** Count criteria, click the **Settings** icon and select **Delete**.
8. In the **Subject Area** section, click to expand **Worker**, and then double-click **.Display Name**.  
Example: If the summary report is to list workers, you can add their Person Number, Gender, and Business Unit Name.
9. In the **Age Band** column, click the **Settings** icon and select **Filter**.
10. Click the **Operator** drop-down list and select **Is prompted**. Click **OK**.
11. Repeat steps 9 and 10 to set the filters for with Gender, Country, and Business Unit Name
12. Click the **Results** tab.
13. Reorganize the columns so that they're in a meaningful order.
14. Click the **Criteria** tab. Remove all the interactions in the results.
  - a. In the **Person Number** column, click the **Settings** icon and select **Column Properties**.
  - b. Click the **Interaction** tab. In the **Column Heading** section, click the **Primary Interaction** drop-down list and select **None**.
  - c. In the **Value** section, click the **Primary Interaction** drop-down list and select **None**. Click **OK**.Similarly, you can remove the interactions for Person Gender and Display Name.

15. Click the **Results** tab. Follow the steps below to remove the scroll bars.
  - a. In the **Table** section, click the **View Properties** icon.
  - b. In the **Data Viewing** section, click to select **Content Paging**. Click **OK**.
16. Click **Save Analysis**.

Edit the original version of the report to call this report.
17. Click the **Catalog** link. In the **Age Band Summary** row, click **Edit**.
18. In the **Column Selector** row, click **Edit View**. In the **Column 2** column, **Assignment Count** row, click the **Column Properties** icon.
19. Click the **Interaction** tab. In the **Value** section, click the **Primary Interaction** drop-down list and select **Action Links**.
20. Click the **PLUS** icon to create a new action link. Click the **Invoke PLUS** symbol and select **Navigate to BI Content**.
21. Navigate to the edited version of the **Age Band Drill** report. Click **OK**.
22. Click **Options**. Click to select **Open in New Window**. Click **OK**. Click **OK**. Click **OK**.
23. Click to select **Do not display in a popup** if only one action link is available at runtime.

If I don't select this, I'll have to select the report from the small popup displaying the report link text, and that's not what I want.

OTBI will open a new tab and run the detail report.
24. Click **OK**. Click **Done**.

The link to the new detail report is added to **Assignment Count**, but not to **Head Count**.
25. Click **Save Analysis**.
26. Save the report and run it from the catalog.

OTBI automatically runs the detailed Age Band Summary report you created in a new tab. You can go back to the original report to view the required details.

## Create a New Data Model for a HCM Report

Here's how to create a data model for an Oracle Business Intelligence Publisher report.

In this example, you create a data model using an absence by department analysis that you created previously.

### Create a Data Model

1. Navigate to the Reports and Analytics work area and click **Browse Catalog** to open the Oracle Business Intelligence Catalog.
2. On the OBI EE home page under Create, Published Reporting, click **More** and select **Data Model**.
3. On the Diagram tab, click **New Data Set** and select **Oracle BI Analysis**.
4. In the New Data Set - Oracle BI Analysis window enter a name for your data model.
5. In the Oracle BI Analysis field, click **Search**.
6. In the Oracle BI Catalog window, click **Users**.
7. Click the name of the person who created the analysis.
8. Locate and select the absence by department analysis that you have previously created.
9. In the **Time Out** field, enter 120.
10. Click **OK**.
11. Click the **Structure** tab.
12. In the **XML Tag Name** field for the Department Name, replace the default value with DEPT\_NAME, and replace the default value in the Display Name with Department.
13. In the **XML Tag Name** field for the Absence Reason, replace the default value with ABSENCE\_REASON, and replace the default value in the Display Name with Reason for Absence.

14. In the **XML Tag Name** field for the Assignment Absences, replace the default value with NUMBER\_ABSENCES, and replace the default value in the Display Name with Number of Absences.
15. Click the **Data** tab.
16. On the Data tab, click **View**.
17. View the report structure and click **Save As Sample Data**.
18. Click **OK**.
19. In the upper-right corner, click **Save**.
20. In the Save As window, select **My Folders**, and enter Absence by Department Data Model.

## How to Disable Column Time Zone Offset in Reports

You can view a report in the same date from different time zones by disabling the column time zone offset for such date/time columns.

Some of the dates in the report showing a one day off for some users and not for others viewing the same report. This is because the date/time in the report is converted to the user's time zone.

Example: When user A runs the report **Reported Time Card Start Date and Time** shows **12-12-2015**. However, when user B runs the same report for the same record, it shows one day earlier **12-11-2015**.

Here's how you can disable the Column Time Zone Offset for such columns.

**Note:** The column has to be date/time and not just date.

1. Log in as an user with Admin access
2. Create a new analysis against the subject area, which has the Time stamp columns not applicable for time zone offset.
3. Select the time stamp columns which you want to disable the time zone offset.
4. For each selected column, select **Column Properties** from the drop-down menu.
5. Navigate to the **Data Format** tab,
6. Check the **Override Default Data Format** checkbox to modify its format and change the **Date Format** to any 1 of the first 3 custom display formats.
7. Change **Data Time Zone Offset** to **Data time zone**.
8. If you only want to change it for this specific report, click **OK**.

However, if you want all the reports using this column to have the same effect, click **Save as Default** and pick the second option **Save as the system-wide default for "...t Date and Time"**.

9. Repeat steps 4 to 8 for each selected Time stamp column you want to disable the time zone offset.

**Note:** If you want to truncate the time from the displayed date, you can use the CAST function. Here are the steps:

1. Click on the column in question and select **Edit Formula**.
2. CAST(Column\_Name as Date).

## Create an OTBI Analysis with a Subquery Filter



## Create an OTBI Analysis with a Subquery Filter

1. Start in Oracle Transactional Business Intelligence
2. Click **Create** and choose **Analysis** to create a new analysis.
3. In **Select Subject Area**, choose **Workforce Profiles - Person Profile Real Time**.
4. Expand the subject area and select the columns:
  - a. Expand **Person ID**.
  - b. Choose **Person Number**.
  - c. Expand **Name**.
  - d. Choose **Assignment Status Type**. Add columns to the report.
5. Click the **Setup** icon in the **Assignment Status Type** column. Filter the **Assignment Status Type** column to show only Active employees.
6. Choose **Filter**.
7. In the **New Filter Dialog**, set Operator to is equal to/is in, and set the Value to Active. Click **OK**.
8. In Subject Areas, expand Person Profile, then Person Profile (again) then choose **Count of Profiles**. Add **Count of Profiles** to your analysis.
9. Click the **Results** tab.
10. Click the **Criteria** tab. This analysis shows a count of profiles. This isn't very helpful, so modify the query to filter only on workers who have at least one profile.
11. Click the **Results** tab.
12. Click the **Table Properties** icon.
  - o Turn on **Content Paging** to make it easier to scroll and click **OK**.
13. Click **Save**. Save the analysis.

Assign a **Name** and **Description** to the analysis and click **OK**.
14. Search for or scroll down to **Workforce Management – Worker Assignment Real Time**. Now, create an analysis that shows workers who do not have profile data.
15. To start, create a new analysis.
16. Select the Subject Areas for the report. Add the columns you want to include in your report.
17. Choose **Person ID, Person Number, Name, Assignment Number, Assignment Status Type**.
18. Collapse **Worker** and expand **Manager**.
19. Choose **Manager Name**
20. Collapse **Manager** and **Expand Business Unit**
21. Choose **Business Unit Name**
22. In the **Person ID** column, click the **Setup** icon. Create a filter to find all of the users who have not created profile data.
23. Click **Filter**
24. Set **Operator** to **Is based on results of another analysis**

Browse for the analysis that you previously saved. There are many saved analyses. Choose the one created earlier.
25. Click **OK**
26. Set the **Relationship** to **is not equal to**
27. Set **Use Values in Column** to **Person ID**.

28. In the **Assignment Status** column, click the Setup icon, then choose **Filter**.
29. Create a filter on the **Assignment Status Type** column so that only active workers are shown.
30. Set the **Operator** to **is equal to/is in**
31. Set the **Value** to **Active**.  
Click **OK**.
32. Click the **Results** tab. Return to the results tab.
33. Click the **Table Properties** icon
34. Choose **Content Paging** to make it easier to scroll the report.  
This is a list of workers who are active, but do not have profile data associated with them.

## Create an OTBI Analysis to Fetch TOPN/BOTTOMN Records

Here's how you can create an OTBI Analysis to fetch TOPN/BOTTOMN records.



### Create an OTBI Analysis to Fetch TOPN/BOTTOMN Records

1. Start in Oracle Transactional Business Intelligence
2. Click **Create** and choose **Analysis** to create a new analysis.
3. In **Select Subject Area**, choose **Workforce Management - Worker Assignment Real Time**.
4. Expand the subject area and select the columns:
  - a. Expand **Business Unit**.
  - b. Choose **Business Unit Name**.
  - c. Expand **Worker Assignment**.
  - d. Choose **Head Count**. Add columns to the report.
5. In the Head Count column, click the **Setup** icon.
6. Click **Filter**. In the New Filter dialog:
  - a. For the **Operator**, choose **is in top..**
  - b. For the **Value**, choose **5**.
  - c. Click **OK**. Add a filter to the Head Count column.
7. Click the **Results** tab. This shows the top 5 business units and their respective headcounts.
8. Click the **Criteria Tab**. Similarly, you could also find the ones that are in the bottom 5.
9. Click the **Edit Filter** icon.
10. Change **is in the top** to **is in the bottom**.
11. Click **OK**. Return to **Results** tab.
12. Click **Table Properties**. In this case, there are more than 5 results because multiple business units have the same head count.
13. Click **Content Paging**.

## Create Agent to Deliver Results of an OTBI Analysis

Here's how you can create an agent to deliver results of an OTBI analysis.



## Create Agent to Deliver Results of an OTBI Analysis

1. Start on the Catalog page in Oracle Transactional Business Intelligence.
2. Expand **My Folders**. To begin, open an existing Birthday E-mail Analysis.
3. Select the **Birthday E-mail Analysis**. This lists all the managers, the employees in their teams, and their upcoming birthdays.

In this case, “upcoming” means all employees who have birthdays in the following month. You don't want to send a list of all employee birthdays to all managers. Each manager needs to get the list of workers for their team only.

4. Click the **Catalog** tab.
5. On Birthday Email Analysis, from the More menu, choose **Schedule**. To create this agent, return to the catalog and create a schedule.
6. Click the **Schedule** tab. Schedule the agent to run on the first day of every month.
7. Set **Frequency** to **Monthly**.
8. Set **On** to **Day 1**. Select all 12 months.
9. Click the **Condition** tab. You can create a Condition, then test to make sure that the default condition, which tests whether there are birthdays for the current month, is true.
10. Click **Test**.
11. Click the **Deliver Content** tab.
12. For the **Subject**, enter **Manager Team Birthday List**
13. Click the **Format** list to show the other available options, but don't change it. Now choose the delivery contents.

You can change the format if needed.

14. Click the **Recipients** tab. You need to include managers, so remove any recipients and select Get Recipients from the Analysis Used in the Agent Condition.

If there are any usernames in the **Recipient** box, select and delete them using the **X** icon.

15. Select **Get Recipients from the Analysis Used in the Agent Condition**.
16. From the **Column Containing Recipients** list of values, choose Manager User Name. You could select a second column containing recipients if needed. The user name is pulled from the manager's Connections entry.
17. Select the **Only Return Rows Relevant to the User Running the Agent**. You can see rows that are relevant to the user who's running the agent.
18. Click the **Save** icon. Save the Agent.
19. Enter **Birthday E-mail Agent** for both the **Name** and **Description**.
20. Click **OK**. This Agent will now run on the first day of every month and deliver the list of birthdays to the managers.

## Create a Query with a Union

Here's how you can create a query that includes a union of two subject areas.

Create a new analysis.



## Create a Query with a Union

1. Click **Create** and select **Analysis**.
2. Open the browser search and search for Worker Assignment. Choose the **Workforce Management - Worker Assignment Real Time** subject area.
3. Click Workforce Management - Worker Assignment Real Time.
4. Collapse **Catalog**.
5. Expand the Worker Subject area. Now select the columns.
6. Select Person Number, Name, and Assignment Status Type Code.
7. Click **Settings** on the **Assignment Status Type Code** column, and select **Filter**.

Now create a filter so only active employees are included in the report.

- a. Click the **Operator** list and select **is not equal to/is not in**
  - b. Set the **Value** to **Inactive**.
  - c. Click **OK**.
8. Select **Settings** and then, click **Delete**.

Now that the filter is created, you don't have to see this column anymore. The filter still works even though you are no longer viewing the column.

9. Click **Results** tab. This shows a report of all active workers.
10. Click **Table Properties** and choose **Content Paging** to enable scrolling in the report.
11. Click **OK**.
12. Click the **Criteria** tab.
13. In the Selected Columns table, click **Combine**.

Return to the Criteria tab and combine this table with another subject area.

14. Select and add the Compensation - Salary Details Real Time subject area:
  - a. Highlight the first query and the Worker area to show the selected columns.
  - b. Highlight the second query and the columns below. For the second query – Salary Details Real Time – the columns have dashed lines around them. This indicates that we need to pull in these fields.
  - c. In **Subject Areas**, click **Person Number** and **Name** fields to add them to the second query.
15. Click **Filter** icon and add two more filters.
16. Add the first filter criteria to select active employees:
  - a. Click **More Columns** and expand **Worker**.
  - b. Select **Assignment Status Type Code** and click **OK**.
  - c. Set the **Operator** to **is not equal to/is not in**
  - d. Set the **Value** to **Inactive**.
  - e. Click **OK**.
17. Click **Filter** and add the second filter criteria:
  - a. Expand **Salary** and select **Number of Days Since Last Salary Change**Click **OK**.
  - b. Select Days Since Last Salary Change.
18. In the New Filter dialog:
  - a. Set **Operator** to **is less than or equal to**.

- b. Set **Value** to **366** (one year)
- c. Click OK .

19. Click Union in the Result column box.

You can choose Union, Union All, Intersect, or Minus. If you choose Union, this displays all current workers including workers who have and haven't had their salaries changed in the last year. (This report isn't that useful.)

Leave this at Union and return to the Results tab.

Display the options but don't change them.

- 20. Click **Results** and then, click the Criteria tab.
- 21. Click **Union** icon. If you change the union to minus, you can view all current workers, minus those who have had a salary change in the last year.
- 22. Select **Minus**
- 23. Click **Results** tab. The report now shows all current workers who have not had a pay raise in the last year.

## Add Metrics to Sort Accrual Data

You can use metrics to provide the accrual balance for any accrual plan.

You can use the following metrics to provide the accrual balance for any accrual plan.

- "Front-Loaded Plan"."Accrual Balance"
- "Incremental Plan"."Accrual Balance"

These metrics help to sort voided accrual data.



# 5 Analytics and Reports Management

## Managing Folders

### How to Create OTBI Folders

You manage OTBI analyses and reports in the business intelligence catalog, where you create folders to organize them.

To create folders:

1. In the catalog, navigate to the desired location of the new folder in the Folders pane.
2. In the catalog toolbar, click **New**, and select **Folder**.
3. In the New Folder dialog box, enter the folder name, and click **OK**.

### Set Folder Permissions and Attributes

You can access the properties of user objects or the Custom folder and any of its subfolders in the catalog to set folder permissions and other attributes. You can view system information, and change attributes or ownership. Other users can access and modify the

#### Set Folder Properties

Follow these steps:

1. In the catalog, click Shared Folders > Custom, and navigate to the custom folder you want to assign properties to.

**CAUTION:** Don't modify permissions on predefined catalog objects. Saving content in the Custom folder is the only way to make sure that it remains untouched during updates.

2. In the Tasks pane, click **Properties**.
3. In the Properties dialog box, select any of the options in the Attributes section:
  - Hidden: Hides the object.
  - System: Makes the object a system object.
  - Read Only: Makes the object read-only.
  - Do Not Index: Excludes the object from the index used by the full-text catalog search. Excluded objects don't display in the results of any full-text catalog search; the object can still be found using the basic catalog search.

4. Use the Ownership section to take ownership of a folder or object in the catalog. This area displays only if the proper privileges were assigned to the user, group, or role. Note that the owner of an object or folder can't automatically access the object or folder.
  - Set ownership of this item: Click to become the owner of the folder or object.
  - Set ownership of this item and all subitems: Click to become the owner of the folder and any sub folders or sub items contained within the item. For example, if you click this link for a dashboard folder, then you take ownership of all of the dashboard's components.

#### Related Topics

- [What happens to modified analytics and reports when a release update is applied?](#)

## Set Folder Permissions

You can assign permissions on folders and other objects.

### Access and Set Permissions

You can set permissions or change ownership for any catalog object or folder. Nonadministrative users can access and modify the permissions of the objects that they create or own.

To set folder permissions:

1. In the catalog, select the folder or object.
2. In the Tasks pane click **Permissions**.
3. In the Permissions dialog box, the owner and any other users, roles, or groups with permissions are listed in the Permissions list.
  - To add a user or role, click **Add users/roles** in the toolbar and search for users or roles to add them to the Selected Members list in the Add Application Roles, Catalog Groups and Users dialog box.
  - To delete a user or role, select the account or role in the Permissions list and click Delete selected users/roles.
4. In the Permissions list, to set ownership for a user, select Custom in the Permissions list for the account, then select **Set Ownership** in the Custom Permissions dialog box and click **OK**. You can also select the Owner option for the user or role.
5. Use the Permissions list to set permissions for the object. Object permissions vary by object.
6. Use the Apply permissions to sub-folders option to assign permissions to the folder's subfolders.
7. Use the Apply permissions to items within a folder to assign them to objects in the folder but not to subfolders.

## Manage Catalog Permission

You may want to remove access to predefined catalog folders so that those associated with offerings you don't use aren't displayed. You can hide the entire predefined catalog or selectively display root catalog folders for offerings.

To control which offerings are available, create a custom role based on the Custom BI Web cat Reporting Duty role and its associated roles for each. Using custom roles, you can manage folder access in a number of ways, depending on requirements and previous modifications you have made.

- Add duty roles for parent folders to the custom role so that all users see a subset of the predefined catalog. Add roles only for the offerings you want to retain access for.
- Don't add any catalog reporting duty roles for any offerings to the custom role to hide the entire predefined catalog and display only **/Shared/Custom** folders. For example, you can remove BI catalog access for external users such as partners who have no access to reporting.
- Delete all catalog reporting duty roles from the custom role. Also, add catalog reporting duty roles to a new or existing job role so that job roles with BI access get default access to the predefined catalog. For example, by default, Financial job roles have access to Financial reporting content but Human Capital Management job roles don't have access to the predefined HCM BI catalog. You can grant the Human Capital Management Folder Reporting Duty role to new job roles to allow access to predefined HCM reports.

## Hide Predefined Catalog Folders

All authenticated users have the Custom BI Web cat Reporting Duty role, which inherits all of the folder reporting roles that determine access and visibility of root level catalog folders. Administrators with IT Security Manager privileges can hide predefined folders by creating custom roles based on this role and their associated roles from the duty role.

1. Open the Security Console.
2. Search for Custom BI Web cat Reporting Duty and review its duty roles to determine which to retain in your custom role.
3. Create a custom role.
4. Click **Actions > Add Role**.
5. Click **Next** twice to navigate to the Role Hierarchy step.
6. To hide all folders, leave the hierarchy empty. Add any roles for offerings you want to retain access for.
7. Run the **Import User and Role Application Security Data** process to synchronize security changes.
8. Click **Browse Catalog** in the Reports and Analytics work area and click **Administration**. In the Maintenance and Troubleshooting section, select **Reload Files and Metadata** to refresh the BI cache.

## BI Reporting Roles

This table shows the mapping between shared root catalog folders, folder reporting roles, and job roles.

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Common Content</b>	BI_COMMON_CONTENT_REPORTING_DUTY	Common Content Folder Reporting Duty	None
<b>/Shared/Customer Data Management</b>	BI_CDM_REPORTING_DUTY	Customer Data Management Folder Reporting Duty	None
<b>/Shared/Enterprise Contracts</b>	BI_OKC_REPORTING_DUTY	Enterprise Contracts Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB, ORA_OKC_SUPPLIER_CONTRACT_TEAM_MEMBER_ABSTRACT
/Shared/Extension	BI_EXT_REPORTING_DUTY	Extension Folder Reporting Duty	None
/Shared/Financials	BI_FIN_REPORTING_DUTY	Financials Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_INVOICE_SUPERVISOR_JOB ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_PAYMENT_SUPERVISOR_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_SOD_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_SOD_JOB, ORA_AR_BILLING_MANAGER_JOB, ORA_AR_BILLING_SPECIALIST_JOB, ORA_CE_CASH_MANAGER_JOB, ORA_EXM_EXPENSE_MANAGER_JOB, ORA_FA_ASSET_ACCOUNTANT_JOB, ORA_FA_ASSET_ACCOUNTING_MANAGER_JOB, ORA_FUN_INTERCOMPANY_ACCOUNTANT_JOB, ORA_GL_FINANCIAL_ANALYST_JOB, ORA_VRM_REVENUE_ANALYST_JOB, ORA_VRM_REVENUE_MANAGER_JOB, ORA_XCC_BUDGET_MANAGER_JOB
/Shared/Higher Education	BI_HED_REPORTING_DUTY	Higher Education Folder Reporting Duty	ORA_HEQ_ADMISSIONS_COORDINATOR_JOB, ORA_HEQ_ADMISSIONS_MANAGER_JOB, ORA_HER_ACADEMIC_COORDINATOR_JOB, ORA_HER_REGISTRAR_JOB, ORA_HES_BURSAR_JOB, ORA_HEY_STUDENT_SERVICES_MANAGER_JOB, ORA_HEY_STUDENT_SUPPORT_ADVISOR_JOB
/Shared/Human Capital Management	BI_HCM_REPORTING_DUTY	Human Capital Management Folder Reporting Duty	By default, predefined HCM job roles have no access to the predefined content.

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Incentive Compensation</b>	BI_IC_REPORTING_DUTY	Incentive Compensation Folder Reporting Duty	ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB, ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_MANAGER_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB
<b>/Shared/Loyalty</b>	BI_LOY_REPORTING_DUTY	Loyalty Folder Reporting Duty	ORA_LOY_LOYALTY_MARKETING_MANAGER_JOB, ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB
<b>/Shared/Manufacturing</b>	BI_MFG_REPORTING_DUTY	Manufacturing Folder Reporting Duty	ORA_CSE_ASSET_ADMINISTRATOR_JOB
<b>/Shared/Marketing</b>	BI_MKT_REPORTING_DUTY	Marketing Folder Reporting Duty	ORA_MKL_SALES_LEAD_QUALIFIER_JOB, ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_ANALYST_JOB, ORA_MKT_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB, ORA_MKT_MARKETING_VP_JOB
<b>/Shared/Partner</b>	BI_ZPM_REPORTING_DUTY	Partner Folder Reporting Duty	ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB
<b>/Shared/Procurement</b>	BI_PRC_REPORTING_DUTY	Procurement Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_PO_BUYER_JOB, ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB, ORA_PO_PROCUREMENT_INTEGRATION_SPECIALIST_JOB, ORA_PO_PURCHASE_ANALYSIS_ABSTRACT, ORA_POQ_SUPPLIER_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			QUALIFICATION_DISCRETIONARY, ORA_POR_PROCUREMENT_ REQUESTER_ABSTRACT, ORA_ POZ_SUPPLIER_ADMINISTRATOR_ ABSTRACT, ORA_POZ_SUPPLIER_ MANAGER_ABSTRACT
/Shared/Projects	BI_PRJ_REPORTING_DUTY	Projects Folder Reporting Duty	ORA_OKC_CUSTOMER_ CONTRACT_ADMINISTRATOR_ JOB, ORA_OKC_CUSTOMER_ CONTRACT_MANAGER_JOB, ORA_ OKC_CUSTOMER_CONTRACT_ TEAM_MEMBER_ABSTRACT, ORA_ OKC_ENTERPRISE_CONTRACT_ ADMINISTRATOR_JOB, ORA_ OKC_ENTERPRISE_CONTRACT_ MANAGER_JOB, ORA_OKC_ ENTERPRISE_CONTRACT_TEAM_ MEMBER_ABSTRACT, ORA_ PJF_GRANTS_ACCOUNTANT_ JOB, ORA_PJF_GRANTS_ ADMINISTRATOR_JOB, ORA_ PJF_GRANTS_DEPARTMENT_ ADMINISTRATOR_JOB, ORA_ PJF_PROJECT_ACCOUNTANT_ JOB, ORA_PJF_PROJECT_ ADMINISTRATOR_JOB, ORA_PJF_ PROJECT_BILLING_SPECIALIST_ JOB, ORA_PJF_PROJECT_ EXECUTION_ABSTRACT, ORA_ PJF_PROJECT_EXECUTIVE_ JOB, ORA_PJF_PROJECT_ INTEGRATION_SPECIALIST_ JOB, ORA_PJF_PROJECT_ MANAGEMENT_DUTY_ABSTRACT, ORA_PJF_PROJECT_MANAGER_ JOB, ORA_PJF_PROJECT_TEAM_ MEMBER_ABSTRACT, ORA_ PJF_PROJECTS_APPLICATION_ ADMINISTRATOR_JOB, ORA_PJF_ RESOURCE_MANAGER_JOB, ORA_ PJF_TEAM_COLLABORATOR_ ABSTRACT
/Shared/Public Sector	BI_PSC_REPORTING_DUTY	Public Sector Folder Reporting Duty	ORA_PSC_AGENCY_STAFF_ ABSTRACT, ORA_PSC_BUILDING_ INSPECTOR_JOB, ORA_PSC_ BUSINESS_ANALYST_JOB, ORA_PSC_CHIEF_BUILDING_ OFFICER_JOB, ORA_PSC_ ECONOMIC_DEV_OFFICER_JOB, ORA_PSC_FINANCE_ADMIN_ JOB, ORA_PSC_INSPECTIONS_ SUPERVISOR_JOB, ORA_PSC_ PERMIT_TECHNICIAN_JOB, ORA_ PSC_PERMITS_APPLICATION_ ADMINISTRATOR_JOB, ORA_PSC_ PERMITS_SUPERVISOR_JOB, ORA_ PSC_PLAN_COORDINATOR_JOB, ORA_PSC_PLAN_REVIEWER_ JOB, ORA_PSC_PRINCIPAL_ JOB

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			PLANNER_JOB, ORA_PSC_SYSTEM_ADMINISTRATOR_JOB
/Shared/Risk Management	BI_GRC_REPORTING_DUTY	Risk Management Folder Reporting Duty	ORA_GTG_APPLICATION_ACCESS_AUDITOR_JOB, ORA_GTG_APPLICATION_CONTROL_MANAGER_JOB, ORA_GTG_COMPLIANCE_MANAGER_JOB, ORA_GTG_ENTERPRISE_RISK_AND_CONTROL_MANAGER_JOB, ORA_GTG_RISK_MANAGEMENT_AUDITOR_JOB, ORA_GTR_USER_ACCESS_CERTIFICATION_MANAGER_JOB
/Shared/Sales	BI_ZBS_REPORTING_DUTY	Sales Folder Reporting Duty	ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZBS_SALES_MANAGER_JOB, ORA_ZBS_SALES_REPRESENTATIVE_JOB, ORA_ZBS_SALES_RESTRICTED_USER_JOB, ORA_ZBS_SALES_VP_JOB, ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB, ORA_ZSP_SALES_ANALYST_JOB
/Shared/Service	BI_SVC_REPORTING_DUTY	Service Folder Reporting Duty	ORA_CSO_KNOWLEDGE_ANALYST_JOB, ORA_CSO_KNOWLEDGE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_JOB, ORA_SVC_INTERNAL_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_INTERNAL_HELP_DESK_AGENT_JOB, ORA_SVC_INTERNAL_HELP_DESK_MANAGER_JOB, ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Subscription Management</b>	BI_OSS_REPORTING_DUTY	Subscription Management Folder Reporting Duty	ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB
<b>/Shared/Supply Chain Management</b>	BI_SCM_REPORTING_DUTY	Supply Chain Management Folder Reporting Duty	ORA_ACD_PRODUCT_DESIGN_ENGINEER_JOB, ORA_ACD_PRODUCT_DESIGN_MANAGER_JOB, ORA_ACE_PRODUCT_MANAGEMENT_VP_JOB, ORA_ACE_PRODUCT_PORTFOLIO_MANAGER_JOB, ORA_CMF_FISCAL_DOCUMENT_SPECIALIST_JOB, ORA_CMF_RECEIVING_SPECIALIST_JOB, ORA_CMR_RECEIPT_ACCOUNTING_DISCRETIONARY, ORA_CSE_ASSET_ADMINISTRATOR_JOB, ORA_CST_COST_ACCOUNTANT_JOB, ORA_DOO_ORDER_ADMINISTRATOR_JOB, ORA_DOO_ORDER_MANAGER_JOB, ORA_EGI_PRODUCT_DATA_STEWARD_JOB, ORA_EGP_PRODUCT_MANAGER_JOB, ORA_ENQ_QUALITY_ANALYST_JOB, ORA_ENQ_QUALITY_ENGINEER_JOB, ORA_FOS_SUPPLY_CHAIN_CONTROLLER_JOB, ORA_INV_INVENTORY_MANAGER_JOB, ORA_INV_WAREHOUSE_MANAGER_JOB, ORA_MNT_MAINTENANCE_MANAGER_JOB, ORA_MNT_MAINTENANCE_TECHNICIAN_JOB, ORA_MSC_BACKLOG_MANAGER_JOB, ORA_MSC_DEMAND_AND_SUPPLY_PLANNER_JOB, ORA_MSC_DEMAND_PLANNER_JOB, ORA_MSC_MATERIALS_PLANNER_JOB, ORA_MSC_REPLENISHMENT_PLANNER_JOB, ORA_MSC_SALES_AND_OPERATIONS_PLANNER_JOB, ORA_MSC_SUPPLY_CHAIN_PLANNER_JOB, ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB, ORA_VCS_SUPPLY_CHAIN_COLLABORATION_PLANNER_JOB, ORA_WSH_SHIPPING_MANAGER_JOB
<b>/Shared/Functional Setup</b>	BI_FSM_REPORTING_DUTY	Functional Setups Folder Reporting Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB
<b>/Shared/Security</b>	FBI_SECURITY_TRANSACTION_ANALYSIS_DUTY	Security Transaction Analysis Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_FND_IT_SECURITY_MANAGER_JOB



## Predefined Catalog Lockdown

If you try to modify the predefined catalog content including folder permissions, you get an alert indicating that you're not allowed to modify content and asking that you save your own content in the **/Shared/Custom** folder.

Here are a few things to know about catalog folders:

- You must save all modified content in the **/Shared/Custom** folder or in new folders in the **/Shared** folder.
- Existing modified content in the **/Shared/Custom** folder or custom folders in the **/Shared** folder and their subfolders is preserved. If you have modified the content in the predefined catalog folders, all changes are lost during any upgrade. To preserve content, archive your catalog content and unarchive it in the **Shared/Custom** folder after upgrade.
- All existing content in parent folders in the **/Shared** folder is preserved.
- You can't change folder or object permissions on the predefined catalog folders or content. For example, you can't change folder permissions to hide folders or objects.

### Related Topics

- [Archive and Move Analytics](#)
- [Role Inheritance](#)
- [Submit Scheduled Processes and Process Sets](#)

## Scheduling Analytics and Reports

### Create Job Definitions to Run Reports as Scheduled Processes

Every job definition has a job type that reflects the executable for the job, such as Java or Oracle Analytics Publisher reports. You can only create job definitions that are based on Analytics Publisher reports.

When there's a job definition for an Analytics Publisher report, users can run the report as a scheduled process in the Scheduled Processes work area. Otherwise, they can open reports (which are set up to be run online) elsewhere, for example in the Reports and Analytics work area.

**CAUTION:** Make sure your user name doesn't contain any spaces. If you create a custom job definition using a user name that contains spaces, other users might get errors when they submit this custom job definition.

### Create Job Definitions

Here's how you create a job definition for an Analytics Publisher report:

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.

**Note:** If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.

2. On the Manage Enterprise Scheduler Job Definitions and Job Sets page, click the Manage Job Definitions tab.
3. Click the **Create** icon.
4. Fill in the Job Definition section.

Field or Check Box	What You Do
Display Name	Enter the name that users see and select to submit the scheduled process.
Name	Enter a name with only alphanumeric characters, for example, <b>AtkEssPrograms1</b> . It can't have spaces or any special characters.
Job Application Name	<p>Select the application to associate the job definition with. What you select depends on the task you're using.</p> <ul style="list-style-type: none"> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications: Select <b>CrmEss</b>.</li> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications: Select <b>FscmEss</b>.</li> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications task: Select <b>EarHcmEss</b>.</li> </ul>
Enable submission from Enterprise Manager	Make sure you don't select this check box.
Job Type	Select <b>BIPJobType</b> . Don't select any other type.
Default Output Format	Select the output format users get by default when they submit the scheduled process.
Report ID	<p>Enter the path to the report in the BI catalog, starting with the folder within Shared Folders, for example: <b>Custom/&lt;Family Name&gt;/&lt;Product Name&gt;/&lt;Report File Name&gt;.xdo</b>.</p> <p>Make sure to include the <b>.xdo</b> file extension for the report definition.</p>
Enable submission from Scheduled Processes	Leave the check box selected.

5. In the Parameters subtab, you can define parameters that are available to users when they submit the scheduled process based on your job definition.
6. In the User Properties subtab, don't create or edit a user property unless you have the accurate information that's required to create or edit one. The **EXT\_PortletContainerWebModule** user property is automatically created.
7. Click **Save and Close**.

When you create a job definition, a privilege with the same name as the job definition is automatically created with a Run prefix. For example, for a job definition named MyProcess1, with display name My Process, the privilege code is RUN\_MYPROCESS1, with Run My Process as the name. Make sure to use the Security Console to assign this privilege to roles so that users who need to run the process can do so.

### Related Topics

- [Define Parameters for Job Definitions](#)
- [How do I update existing setup data?](#)
- [Configure Offerings](#)
- [Manage List of Values Sources](#)
- [Edit Job Definitions](#)

## Define Parameters for Job Definitions

A parameter controls which records are included or how they are affected when a job runs. Job definitions can have one or more parameters or none at all.

You define parameters while creating or editing job definitions using the Manage Enterprise Scheduler Job Definitions and Job Sets page. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions or a product-specific functional area
- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

When users run the scheduled process for job definitions of type BIPJobType, the values they enter for the parameters determine the data to be included in the report. Also, the values are passed to the data model that the report is using.

The parameters that you define must be in the same order as parameters in the data model for the report. For example, the data model has parameters in this order:

- P\_START\_DATE
- P\_END\_DATE
- P\_CURRENCY

You create parameters as follows:

- Start Date
- End Date
- Currency

### Defining Parameters: Job Definitions

To define parameters while creating or editing job definitions:

1. On the Manage Job Definitions page, open the Parameters sub tab.
2. Click **Create**.
3. Enter the parameter prompt that users see when they submit the scheduled process.
4. Select a data type and configure how the parameter and the data entered are displayed, as described in this table.

Data Type	Fields
Boolean	<p>Select this if you want the parameter to be a check box.</p> <p>Select <b>True</b> or <b>False</b> to determine if the check box is selected or not.</p>

Data Type	Fields
Date or time	<p>Select <b>Date and time</b> or <b>Date only</b> option.</p> <p>Select a value from the <b>Default Date Format</b>.</p> <p><b>Note:</b> Make sure the format you select here is the same as the format used for the job. If the job definition type is BIPJobType, select <b>yyyy-MM-dd</b>, and make sure the data model for the corresponding Oracle Analytics Publisher report is using the same date format.</p>
Number	<p>Select a <b>Number Format</b>.</p> <p>Select <b>Left</b> or <b>Right</b> for data alignment.</p>
String	<p>Select a <b>Page Element</b>.</p> <p>Select <b>Text box</b> if you want the user to provide a text.</p> <p>Select <b>Choice list</b> if you want a list with limited options (maximum 10). If there are more than 500 values, users will get an error when they try to set the parameter as part of submitting the scheduled process.</p> <p>Select <b>List of values</b> if you want a list with unlimited options with a search facility.</p>

5. Select the **Read Only** check box if you don't want to enable users to set this parameter. When a parameter is set as read only, the user is required to provide a default value to be passed to the job definition.
6. If you select list of values or choice list page element, select a **List of Values Source** and an **Attribute**. Use the list of values sources from the Manage List of Values Sources tab. Don't define lists of values in the data model that the report is using.
7. From the list of available attributes, select the attributes you want to appear in the list and move them to the selected attributes section. These attributes determine the values that the user can see.
8. Define a **Default Value** for the parameter.
9. In the **Tooltip Text** field, provide additional information for the user to follow.
10. Select the **Required** check box if users must set this parameter to submit the scheduled process.
11. Select the **Do not Display** check box if users should not see this parameter while submitting the process.
12. Click **Save and Create Another** or **Save and Close**.

## Dependent Parameters

The attributes of some parameters depend on the attributes or values of certain other parameters. The attributes of a parameter would change if the value of its dependent parameter changes.

For example, you have three parameters, namely Country, State and, City. In this case, the value of the Country parameter would determine the values available in the State parameter. The values in the State parameter would determine the values available in the City parameter.

#### Related Topics

- [Create Job Definitions to Run Reports as Scheduled Processes](#)
- [Define Dependent Parameters in Job Definitions](#)

## Set Up Reports for Scheduling

You can set up reports as scheduled processes so users can submit them from the Scheduled Processes and other work areas.

If you want users to also submit these scheduled processes from the Reports and Analytics work area and panel tab, then you need to configure properties for the corresponding reports.

### Enable a Report for Scheduling

1. In the Reports and Analytics work area or panel tab, edit the report in the business intelligence catalog.
2. Click **Properties**.
3. In the General tab in the Properties dialog box, enter the field values as shown in this table and then click **OK**.

Field	Value
Enterprise Scheduler Job Package Name	Enter the path for the job definition, for example: <code>/oracle/apps/ess/&lt;product family&gt;/&lt;product&gt;/&lt;business area&gt;/Jobs</code>
Enterprise Scheduler Job Definition Name	Enter the job definition name (not display name), for example: <code>ABCDEFGH</code>

#### Related Topics

- [Set Up the Reports and Analytics Panel Tab](#)
- [How You Access and Modify Report Components](#)
- [Create Job Definitions to Run Reports as Scheduled Processes](#)

## Schedule Analytics, Dashboard Pages, and Briefing Books

You can schedule Analytics, dashboard pages, and briefing books to run when you need them. You can also schedule other automated tasks, for example to deliver results to specific recipients, send notifications, or to generate a list of changes implemented today using the

### Create an Agent

1. Open the Reports and Analytics work area or the Reports and Analytics panel tab if available in other work areas.
2. Click **Browse Catalog**.
3. Click the **New** icon and, from the Actionable Intelligence section, select **Agent**.

4. Make sure you enter information on the Delivery Content tab to specify the analysis, dashboard page, or briefing book to run. Browse for the analysis, dashboard page, or briefing book, which must be specified to generate an attachment.
5. Click the **Save this Agent** icon and save it in **My Folders**.

#### Related Topics

- [Schedule Reports](#)

## Schedule Reports

Reports can run based on a schedule that you define. You can set up other automated tasks, for example to deliver results to specific recipients or send notifications. You submit a report with the schedule and criteria for other automated tasks defined.

If a report is set up as a scheduled process, you submit the process as you would any scheduled process. You can schedule them from:

- Any work area where there is a link to the report.
- The Scheduled Processes work area, where you can submit all processes that you have access to.
- The Reports and Analytics work area or panel tab, if the report is set up for submission from there.

## Submitting a Report or Scheduled Process

Follow these steps:

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas where you can find the report.
2. Click the name of your report.
3. Click **Schedule** if the option is there. The report is set up as a scheduled process.
  - a. Enter any parameters to avoid unnecessarily large results.
  - b. Click **Advanced** to enter a schedule, deliver results to a specific destination (including e-mail or printer), or define criteria for sending notifications.
4. If you don't see **Schedule**, then click **View**.
  - a. Click the **Actions** button for the report and select **Schedule**.
  - b. Enter information similar to step 3.

#### Related Topics

- [Schedule Analytics, Dashboard Pages, and Briefing Books](#)
- [What are scheduled processes?](#)
- [View Status and Other Details for Scheduled Processes](#)
- [Submit Scheduled Processes and Process Sets](#)

## Adding Analyses to Application Pages

### How to Add an Analysis to the Human Resources Dashboard

Here's how to add an analysis to the Human Resources dashboard. You can add analyses to some of the pages that you can edit.

**CAUTION:** Make sure that the analysis isn't querying against a large volume of records. If that's the case, then the page can take a long time to open after you add the analysis.

These are the key decisions for this scenario.

Decisions to Consider	In This Example
Which analysis do you want to add?	Position Occupancy.  <b>Note:</b>
Do you have to change the layout of the page?	No.  <b>Note:</b>
Do you want all or only one view of the analysis?	All views.
Are these changes for you only, or for all users of the Human Resources dashboard?	You only.

### Add an Analysis to the Human Resources Dashboard

1. Open the Human Resources dashboard.
2. Click your name in the global header and select **Edit Pages**.
3. With the Add Content tab open in the page editor, lick the **Add Content** button where you want the analysis to go.  
The **Reports and Analytics** folder in the Add Content dialog box contains what's in the BI catalog.
4. Click **Add Content** for the wider column.  
The **Reports and Analytics** folder in the Add Content dialog box contains what's in the BI catalog.
5. Click through the folders in the catalog until you see the name of the analysis, and click **Add** to include all views of the analysis.  
If you instead click **Open** or **Position Occupancy**, you can select a specific view to add.

6. Click **Close** after you see the analysis added to the dashboard.
7. Click **Close** to save your changes and close the editor.



# 6 Maintenance and Migration

## How to Tune Performance for Reports

SQL query tuning can improve the performance of reports. Diagnose issues and an explain plan. Here are some factors that can slow down query performance, and some suggestions for improvement.

Factor	Description	Suggestions
Filters	Reports with no filters or filters that allow a large volume of data may hurt performance.	Use filter conditions to limit data.
Joins	Reports that join a lot of tables can run slowly.	Remove any unnecessary joins.
Data volumes	Reports with no filters or filters that allow a large volume of data may hurt performance.	Add filter conditions to limit data, preferably using columns with database indexes. Use caching for small tables.
Indexes	Filters that use database indexes can improve performance.	Use SQL hints to manage which indexes are used.
Sub-queries	Sub-queries can impact performance.	<ul style="list-style-type: none"> <li>Avoid complex sub-queries and use Global Temporary Tables where necessary.</li> <li>Avoid too many sub-queries in where clauses if possible. Instead, rewrite queries with outer joins.</li> </ul>
Aggregation	It helps performance to prioritize aggregation in the database.	<ul style="list-style-type: none"> <li>Use Oracle SQL Analytical functions for multiple aggregation.</li> <li>Use CASE statements and DECODE functions for complex aggregate functions.</li> </ul>

## Review SQL Statements Used in Analyses

You can review logical and physical SQL statements using either of the following procedures.

### Logical and Physical SQL

Logical SQL is non-source specific SQL that's issued to the Oracle BI Server for an analysis. Logical queries use column names from the subject areas in the Presentation Layer in the repository (RPD) metadata. Based on the logical request,

the BI Server issues optimized source-specific SQL to the actual data sources in the Physical Layer of the metadata. If you have administrative privileges, you can review both logical and physical SQL for analyses.

## Edit Mode

1. Open the analysis in Edit mode and click the Advanced tab.
2. In the SQL Issued section, review the logical SQL statement.

## Administration Page

1. On the Administration page, in the Session Management section, click the **Manage Sessions** link.  
**Note:** You must be a Business Intelligence Administrator to access the Administration and Manage Sessions page.
2. On the Manage Sessions page, in the Action column, click the **View Log** link to review the SQL statement.

## Localize Catalog Captions

As an administrator, you can localize the names of reporting objects, or captions, that users create in the catalog. For example, you might localize the names of dashboards and analyses into Spanish and French.

To localize object names in the catalog, export the captions from the catalog, localize them, and upload back to the catalog.

1. Export the default captions to an XML file.
2. Localize the downloaded XML file.
3. Upload the localized XML file.

After translated caption XML is uploaded, the new strings take effect once the cache refreshes. Translated strings are protected during an upgrade.

## Export Captions from the Catalog

1. Click **Administration**.
2. Click **Export Captions**.
3. Click **Browse** and select the folder you want to localize in the catalog, then click **OK**.
4. Save the XML file.

## Localize Your Captions

Translate the XML file into one or more languages.

## Upload Localized Captions to the Catalog

After you have localized captions, upload the translated XML files, one for each language.

1. Click **Administration**.

2. Click **Import Captions**.
3. Click **Browse** and select the localized XML file, then click **OK**.
4. Use the Select Language option to select the language to which you have localized, then click **OK**.
5. Save the XML file.

To download, review, or delete imported captions files, use the **Manage Captions** option.

## Archive and Move Analytics

You can archive your analytic objects and move them to a new location. You can bundle the whole catalog, specific folders, or multi-component objects as a .catalog file and upload the file to unarchive its data in another location.

**Note:** It's important to note that folders that contain seeded content should not be changed. Moving or adding a child folder to a seeded folder results in analytics not being visible in dashboards or infolets.

### Create an Archive

1. Locate the object in the catalog.
2. Select **More** and then select **Archive**.
3. In the Archive dialog box, select one or more of the following options:
  - Keep Permissions: Maintain the object or folder's existing permissions. If you don't select this, the archiving process doesn't include any permissions. Once unarchiving, the parent folder's permissions are assigned to all of the objects and folders.
  - Keep Time stamps: Maintain the Creation Time, Last Modified, and Last Accessed times assigned to the object or folder. Upon unarchiving, the Last Modified time is updated to indicate the time when the object or folder is unarchived. If you select this option, the Old option in the Paste Overview area of the Preferences dialog box is available when unarchiving. Use the Old option to overwrite existing catalog items older than the items in the archive.

If you don't select this option, then the archiving process doesn't include time information and the Old option in the Paste Overview area of the Preferences dialog box isn't available.

4. Click **OK** to download the archive file.

### Move an Archived Object to a New Location

1. Select the folder in the catalog where you want to upload the archived file.
2. In the **Tasks** pane click **Unarchive**.
3. In the Unarchive dialog box, browse for and select the archive file.
4. Use the Replace option to specify whether to replace an existing folder or object with the same name.
  - All: Replace any existing folders or objects with the same names as folders or objects included in the archive file that you're uploading.
  - Old: Replace folders or objects except those folders or objects that exist, unless they're older than the source.

- None: Add any new folders or objects, but preserve any existing folders or objects.
  - Force: Add and replace all folders or objects.
5. Use the Access Control Lists option to specify how the folders or objects are assigned permissions using Access Control Lists Access when unarchived.
- Inherit: Inherits the folder or object's permissions from its new parent folder.
  - Preserve: Preserves the folder or object's permissions as it was in the original, mapping accounts as necessary.
  - Create: Preserves the folder or object's permissions as it was in the original, creating and mapping accounts as necessary.
6. Click **OK**.

## Row Limits in Analyses

It's recommended that you use Analytics Publisher reports to export large data sets, as there are analysis row limits.

- There's a limit of 65,000 records for analyses. When you run an analysis that contains more rows than that, the results are limited to 65,000 rows.
- Exports to Excel are limited to 25,000 rows and 50,000 cells.

# 7 Infolets

## Overview of Infolets

An infolet is a small interactive widget that gives you key information and shows you what's going on in the areas you work on. You might also find something in an infolet that you need to follow up on.

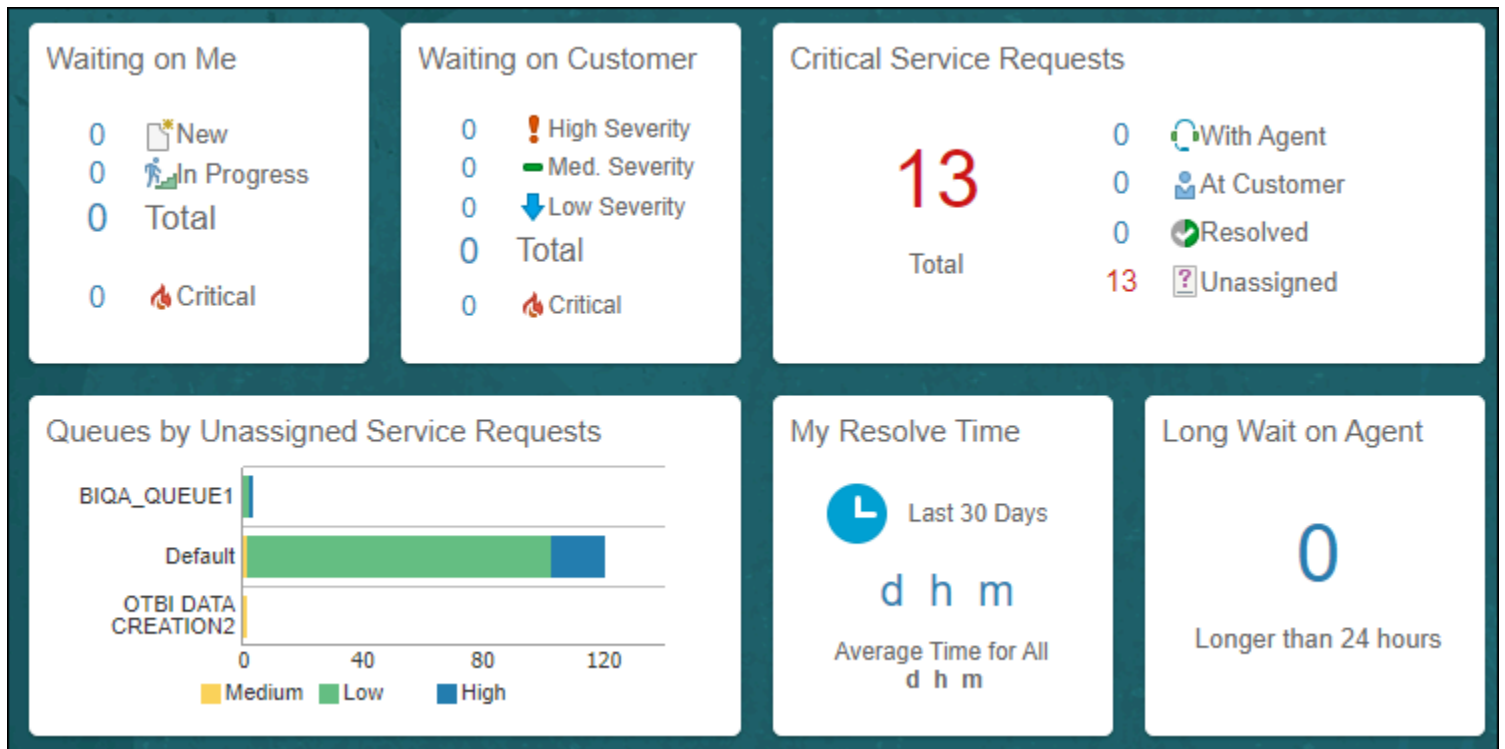
You can use infolets arranged in tabs in the Analytics section of your home page. If you're using a panel or banner layout, use the page control icons to use the infolets.

Here are a few things to know about infolets.

- Infolets have a front view, and might have a back and expanded view. Use the **Back View**, **Front View**, and **Expanded View** icons at the bottom corners of an infolet to open these views.
- Your current infolet view persists as the default view the next time you sign in. For example, if you viewed a back view of the infolet in your last session, you will see the same infolet view by default in your next session.
- Some infolets might also contain links to detailed reports. You can click anywhere in the infolet area to drill down to the detailed report.
- You can also personalize the infolets. For example, you can move or hide them on the infolets page.
- If you don't see infolet pages on your home page, then your administrators must have disabled them to show on the home page.

**Note:** Some SCM or Procurement Cloud infolets might function differently from other infolets.

Here's how an infolet page looks.



## Personalize Infolets

You can personalize the infolets on your infolets page, such as you can edit their titles and views, move them, or hide or show specific infolets on the infolets page.

### Edit Infolet Titles and Views

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Title and Views**.
2. Edit the infolet title, and enable or disable the infolet views.
3. Click **Save and Close**.

### Reorder Infolets

You can change the position of an infolet within an infolet page.

1. Click the **Infolet Repository** icon, and select **Reorder Infolets**.
2. In the Reorder Infolets dialog box, select the infolets, and use the arrows to reorder them.  
**Tip:** To select multiple infolets, press the Ctrl key, and then select them.
3. Click **Apply**.

## Hide or Show Infolets

To hide an infolet from an infolet page, click the **Infolet Repository** icon, and deselect the infolet from the list of infolets.

**Tip:** Alternatively, click the **Actions** icon on the top right corner of the infolet, and select **Hide**.

To show a hidden infolet on an infolet page, click the **Infolet Repository** icon, and select the infolet from the list of infolets.

### Related Topics

- [Configure Infolet Display](#)

## Configure Infolets

### Overview of Configuring Infolets

You can configure infolets that aggregate key information for a specific area, for example, personal profile.

Your users use infolets arranged in tabs in the Analytics section of the home page. Or, if it's a home page with a panel or banner layout, they use the page control icons.

If your users don't find infolet pages on the home page, you can enable them by using the Home Configuration tab in the Structure work area. Let's look at some tasks you can do to configure infolets.

- Create infolets.
- Add content to infolets. For example, you can add a task flow or a performance tile report, and if an infolet contains a performance tile report, then you can add a link to a detailed report in the same infolet.

**Note:** In the context of infolets, a report is an analysis, not an Analytics Publisher report.

- Edit infolets. For example, edit infolet content and add, change, or remove link to detailed report.
- Delete infolets.

But before you start creating and editing infolets, here are a few things to keep in mind:

- You can add analyses from the catalog to an infolet, but not Analytics Publisher reports, or other objects like filters or prompts.
- To create or edit infolets, you must first either create and activate a sandbox, or activate an existing one. But make sure the sandbox has the Page Composer tool selected. If you want to make changes in a context layer that isn't the default layer, Site, you must create a separate sandbox just to use Page Composer in it. You can then change the context layer from Site to the other layer. For example, to create or edit infolets for a user with a specific job role, you must select the **Job Role** context layer.
- You can validate your changes in the sandbox in preview mode before you publish it.

### Related Topics

- [Configure Infolet Display](#)
- [Best Practices for Using Page Composer in Sandboxes](#)

## Create Infolets



Use infolet pages to create infolets. You can create an infolet, add content to it, and link detailed reports. For some product-specific infolet pages, you can't create infolets.

1. Activate a sandbox that has the Page Composer tool in it.
2. Open an infolet page.
3. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Edit Pages**.
4. Click the **Infolet Repository** icon, and select **Create Infolet**.

**Note:** If you can't find the **Create Infolet** menu item, it either means you can't create infolets for this page, or the theme may be using a global text and icon color that's too light, impacting the visibility of the UI element.

5. Enter a title for the infolet and set its views.
  - Specify the dimensions for the front view.
  - Enable or disable the back view.
  - Enable or disable the expanded view, and specify its dimensions. The dimensions of the front and the back views must be the same, but the expanded view must be bigger because it displays more details.
6. Click **Save and Close**. You can now add content to infolets.

### Add Content to Infolets

You can add content to the infolet's front, back, or expanded view. You can't add a business intelligence dashboard to an infolet because a dashboard report is generally bigger than an infolet.

1. Select the infolet's view that you want to add content to.

**Note:** To open infolet's back view, click the **Back View** icon on the bottom right corner of the infolet. And to open expanded view, click the **Expanded View** icon on the bottom right corner of the infolet's back view.

2. Click **Add Content** on the infolet. You can find this button on any of the infolet's views, but only if you don't have any existing content in that view.
3. Search and select a performance tile or a task flow, and click **Add**. You can browse the business intelligence (BI) catalog to find the analytics and reports that you want to add.
4. Close the Add Content dialog box. You can now add detailed reports to the infolet.

### Link Detailed Reports to Infolets

To provide detailed information about a subject matter on an infolet, you can add a link to a detailed report. After you add the link, your users can click anywhere in the infolet area to drill down to that detailed report. The detailed report doesn't replace the existing infolet content.



First, add a performance tile report to the infolet content, and then follow these steps:

1. Click the **Actions** icon on the top right corner of the infolet, and select **Link Detailed Report**.
2. On the Detailed Report page, click **Add Content**.
3. Search and select a report, and click **Add** to add it to the infolet.
4. Close the Add Content dialog box.
5. Click **Done**. You can now publish the sandbox.

## Publish the Sandbox

1. Preview the infolet's front view, drill down to the detailed report, and then preview the back and the expanded views.
2. After you made changes, click **Close** to leave Page Composer.
3. Test your changes and publish the sandbox to make the new infolet available to your users.

### Related Topics

- [Why don't I see infolets in the Analytics section of the home page?](#)
- [Overview of Sandboxes](#)
- [Create and Activate Sandboxes](#)
- [Best Practices for Using Page Composer in Sandboxes](#)
- [Why can't I see application changes made in previously published sandboxes in my current sandbox?](#)

## Edit and Delete Infolets

On the infolet page, use the options available on each infolet to edit infolet content and delete infolets.

1. Activate a sandbox that has the Page Composer tool in it.
2. Open an infolet page.
3. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Edit Pages**.

**Note:** After you're done making changes, click **Close** to leave Page Composer, test your changes, and publish the sandbox.

## Edit Infolet Content

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Content**.

**Note:** To edit the infolet content of the back or expanded view, open the view and use the **Actions** icon on that view.

2. Click **Add Content** to replace the existing content of the infolet.
3. Search and select a performance tile or a task flow, and click **Add**. You can browse the business intelligence (BI) catalog to find the analytics and reports that you want to add.
4. Close the Add Content dialog box.

## Edit Title and Views

To edit title and views of an infolet, click the **Actions** icon on the top right corner of the infolet, and select **Edit Title and Views**.

## Edit or Remove Detailed Report

You can edit or remove the detailed report.

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Detailed Report**.
2. On the Detailed Report page, you can edit or remove the detailed report.
  - To edit, click **Edit Report** and make changes to the detailed report.
  - To remove, click **Remove Report**.
3. Click **Done**.

## Edit Infolet Visibility

You can show or hide an infolet on the infolet page. To edit the visibility settings of an infolet, do these steps:

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Visibility**.
2. Select one of these options:
  - **Yes**: The infolet appears on the infolet page.
  - **No**: The infolet doesn't appear on the infolet page.
  - **EL Expression**: The evaluation of the EL expression decides whether the infolet appears on the infolet page.

## Delete Infolets

To delete an infolet, click the **Actions** icon on the top right corner of the infolet, and select **Delete**.

**CAUTION:** You can't easily retrieve an infolet once you delete it. But if you have accidentally deleted any infolet, don't worry. Contact My Oracle Support at <https://support.oracle.com>.

### Related Topics

- [Overview of Sandboxes](#)
- [Create and Activate Sandboxes](#)

## Examples of EL Expressions

You can use EL expressions to configure the visibility settings of various elements like groups, page entries, infolets, or announcements on the UI for users with specific roles.

For example, you can use EL expressions to show or hide a group or page entry on the Navigator and the home page, or show or hide an infolet or an announcement on the home page. The evaluation of the EL expression decides whether these elements are displayed for users with specific roles.

## Scenario

This table shows examples of how you can use EL Expressions to show or hide specific UI elements for specific users.

Who can see the group or page entries	EL Expression and Example
Only users having any of the specific roles	<pre>#{securityContext.userInRole['&lt;Role_Name&gt;']}</pre> <pre>#{securityContext.userInRole['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB']}</pre>
Only users not having any of the specific roles	<pre>#{!(securityContext.userInRole['&lt;Role_Name&gt;'])}</pre> <pre>#{!(securityContext.userInRole['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB'])}</pre>
Only users having all of the specific roles	<pre>#{securityContext.userInAllRoles['&lt;Role_Name&gt;']}</pre> <pre>#{securityContext.userInAllRoles['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB']}</pre>
Only users not having all of the specific roles	<pre>#{!(securityContext.userInAllRoles['&lt;Role_Name&gt;'])}</pre> <pre>#{!(securityContext.userInAllRoles['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB'])}</pre>

Here are a few things to keep in mind when you use EL expressions.

- Use an EL expression that can be evaluated from any page because the Navigator is used on all pages. So, don't use product-specific EL expressions.
- Don't include spaces or double quotes in EL expressions.
- Don't copy EL expressions from a word document and paste directly in the expression editor. Doing so might introduce hidden characters in your EL expression, causing formatting issues and unexpected action. Instead, use a text editor or manually type the EL expression in the editor.

### Related Topics

- [Configure the Navigator and Page Entries on the Home Page for Navigation](#)
- [Create Roles in the Security Console](#)

## FAQs for Infolets

### Why don't I see infolets in the Analytics section of the home page?

That's probably because the infolet page is hidden.

Change the visibility setting of the infolet page using the Home Configuration page of the Structure work area. To open this page, click **Navigator** > **Configuration** > **Structure**, and then click the Home Configuration tab.

*Related Topics*

- [Configure Infolet Display](#)

## How can I rename an icon for an infolet page in the page control on the home page?

You can rename an icon for an infolet page using the Home Configuration page of the Structure work area. To open this page, select **Configuration** > **Structure** from the Navigator menu, and then click the **Home Configuration** tab.

*Related Topics*

- [Configure Infolet Display](#)

## What's the difference between a performance tile report and a detailed report added to the infolets content?

Performance tile report shows data in the small infolet format. When you add a performance tile report to an infolet, users can see only the summary information about the subject matter. But this report doesn't provide detailed information.

To provide detailed information about the subject matter on the same infolet, add a link to a detailed report. Users can click this link to gather more information.