

Oracle Fusion **Applications Administrator's Guide for Analytics and Reports**

Release **12**

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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon  to access Oracle Applications Help in the application. If you don't see any help icons on your page, click the Show Help icon  in the global header. Not all pages have help icons. You can also access Oracle Applications Help at <https://fusionhelp.oracle.com>.

Using Applications Help

 **Watch:** This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community:** Use [Oracle Applications Customer Connect](#) to get information from experts at Oracle, the partner community, and other users.
- **Guides and Videos:** Go to the [Oracle Help Center](#) to find guides and videos.
- **Training:** Take courses on Oracle Cloud from [Oracle University](#).

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1 Introduction

Analyses and Reports: Administrative Overview

Analyses and reports in Oracle Applications Cloud are built using Oracle Business Intelligence (BI) tools and technologies, which you also use for administration and setup. Oracle Business Intelligence provides several tools and a variety of report types to meet different reporting requirements.

Oracle Transactional Business Intelligence is a real-time, self-service solution that lets users create ad hoc analyses and reports with real-time transactional data, using different Oracle BI technologies.

- **Analyses** are visualizations, such as charts and tables, of a specific set of data. An analysis can be embedded into an application page, or included as a component of a dashboard. Analyses are generally interactive, allowing users to customize the presentation of the data in real time.
- **Dashboards** are a collection of analyses grouped together to return data.

Operational reports are static reports that meet operational and statutory reporting requirements. Operational reporting includes the generation of high-volume business documents such as payroll and invoices. Oracle Business Intelligence Publisher is the tool for operational reporting, and many predefined reports may be provided with your applications.

Tools for Administering Analyses and Reports: Explained

You can use several different tools to manage and administer analyses and reports.

These components support modification and administration of your analyses and reports:

- Use the Business Intelligence catalog to interact directly with your reports and analyses. Use this interface to manage permissions, properties, and the organization of your analyses and reports.
- Use the Oracle Business Intelligence Publisher administration pages to configure settings specific to the running and scheduling of operational reports, such as setting up your delivery servers, managing scheduler work load, and setting run-time properties for reports.
- Use the Oracle BI Administration Tool to edit the Oracle BI repository (RPD), which contains the metadata upon which reports and analyses are built. The Administration Tool is a Windows application that you use to edit the RPD based on your requirements. You can use the Administration Tool to perform data modeling tasks such as adding new fact or dimension tables, reorganizing Presentation layer metadata, and creating BI view objects for tables. This tool isn't available in Oracle Cloud implementations.
- Use the Catalog Manager to perform online and offline management of the catalog. Tasks that you can perform with the tool include managing folders, shortcuts, global variables, and Oracle BI objects such as analyses, filter, prompts, and dashboards; viewing and editing catalog objects in XML, and searching for and replacing catalog text. This tool isn't available in Oracle Cloud implementations.
- Use the Oracle Enterprise Manager Cloud Control to monitor your IT environment unattended. It's delivered with a predefined set of performance and health metrics that enable you to monitor key environment components, access real-time performance charts, and perform strategic tasks such as trend analysis and reporting. This tool isn't available in Oracle Cloud implementations.

Business Intelligence Catalog: Explained

Reports, analyses, dashboards, and other business intelligence (BI) objects are stored and administered in the business intelligence catalog.

Navigating to the Catalog

To navigate to the catalog:

1. Click **Reports and Analytics** under **Tools** in the Navigator.
2. In the Reports and Analytics pane, click the **Browse Catalog** icon.

Identifying Objects in the Catalog

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

BI objects and reports are organized in the following folder hierarchy:

- Shared Folders (top level)
- Product family (example: Financials)
- Product (example: Payables)
- Report groups (example: Invoices)
- Dashboard reports
- Data Models
- Report Components
- BI Publisher reports
- Prompts

The following table describes the common BI objects that you find in the catalog:

Catalog Object	Description	Location
Analysis	Analyses are used primarily by dashboards.	Report Components folder
Dashboard	Dashboards organize analytical content and catalog objects, and present them in a meaningful way.	Reporting group folder
Dashboard Prompt	Dashboard prompts allow users to filter dashboard content using provided values.	Prompts folder
Filter	Filters are used in dashboards and analyses.	Prompts folder

Catalog Object	Description	Location
Report	Reports are operational reports created in Business Intelligence Publisher.	Reporting group folder
Data Model	Subtemplates are used by reports created in Business Intelligence Publisher.	Data Models folder
Subtemplate	Data models are used by reports created in Business Intelligence Publisher.	Reporting group folder

Define Transactional Business Intelligence Configuration: Overview

Use the Define Transactional Business Intelligence task list in the Setup and Maintenance work area to complete configuration of business intelligence in your application. Some tasks in this task list are performed during Oracle Applications Cloud provisioning and require no further action from you. The Define Transactional Business Intelligence Configuration task list includes the following tasks:

- **Optimize Transactional Business Intelligence Repository**
Trim unused projects from the business intelligence repository based on configured Oracle Applications Cloud offerings. This optimization is automated during the provisioning process and requires no further action from you.
- **Manage Transactional Business Intelligence Connections**
Review data source connections in the physical layer of the business intelligence repository. Connections are set up and reviewed during the provisioning process, and this task requires no further action from you.
- **Manage Security for Transactional Business Intelligence**
Review security for business intelligence users. The default security configuration can be modified. Refer to the security documentation for your cloud services to review or change the default user security model.
- **Configure Key Flexfields for Transactional Business Intelligence**
Define the key flexfield segments and validation for use as classification keys. You must define these key flexfields for Oracle Fusion Transactional Business Intelligence to operate correctly.
- **Configure Descriptive Flexfields for Transactional Business Intelligence**
Define validation and display properties of descriptive flexfields, which are used to add custom attributes to entities. You enable and import flexfields for use in analyses.
- **Import Essbase Cubes into Transactional Business Intelligence Repository for Financials General Ledger**
Import Essbase cubes into the business intelligence repository. You must perform this task if you're using Oracle Fusion General Ledger.
- **Manage User Currency Preferences in Transactional Business Intelligence**
Manage user currency preferences, which control regional currency settings, currency used in reports, and corporate currency.

Related Topics

- [Essbase Rule File and Cubes: Overview](#)
- [Configuring Flexfields for Use in Analyses: Overview](#)
- [Configuring Descriptive Flexfields for Transactional Business Intelligence: Overview](#)
- [Importing Flexfield Changes: Overview](#)
- [Setting Currency Preferences for Analytics](#)

2 Configuring Flexfields for Business Intelligence

Configuring Flexfields for Use in Analyses: Overview

Flexfields are extensible sets of placeholder fields associated with business objects which can be placed on application pages. You can use flexfields 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 or customization 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. For Oracle Sales Cloud, the Extensibility Framework supports extension.

Flexfield Types

The following types of flexfields are available and provide a means to customize 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.

Related Topics

- [Enabling Key Flexfields for Business Intelligence Reporting: Procedure](#)
- [Configuring Extensible Flexfields: Procedure](#)


Configuring Key Flexfields for Transactional Business Intelligence

Enabling Key Flexfields for Business Intelligence Reporting: Procedure

To include flexfields in your Transactional Business Intelligence reporting, 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. Navigate to Manage Key Flexfields.
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** 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:

 **Note:** The BI Object Name is the Logical Table name in the RPD used as the dimension for the corresponding segment.

- 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

For all non-qualified segment labels, the BI Object name must be populated with one of the following:

- Dim - GL Segment1
- Dim - GL Segment2
- Dim - GL Segment3
- Dim - GL Segment4
- Dim - GL Segment5
- Dim - GL Segment6
- Dim - GL Segment7
- Dim - GL Segment8
- Dim - GL Segment9
- Dim - GL Segment10

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

- [Enabling Key Flexfield Segments for Business Intelligence: Points to Consider](#)

Setting Up the GL Accounting Flexfields: Procedure

This is 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
- Defining Segment Labels
- Assigning Unique Segment Labels
- Performing Column Flattening
- 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** dimensions. These dimension tables are populated from a Tree value object or from a Value Set value object depending 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 are 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 and 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 n where n is an integer from 1 to 10

Defining 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. Other segment labels are optional and can be assigned as needed.

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, and that are used for specific purposes.

For example, assign the Primary Balancing segment label to the segment used for your company or legal entities in order to provide 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. Launch 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, and click the **right arrow** 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. Launch **Manage Trees and Tree Versions** 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** drop-down 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 a patch, but the flexfield has not yet been deployed so the patched 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. Access **Manage Chart of Accounts** from Setup and Maintenance work area.
2. Click **Search**.
3. Locate the Deployment Status column.
4. Click the icon under the heading.
5. Select **Edited**.
6. Click **Deploy Flexfield**.
7. Monitor the Deployment Status and when it reaches 100% click **OK**.
8. Verify that a green check mark displays in the Deployment Status column.
9. Click **Done**.

Accounting key flexfields have one of the following 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 a patch, but the flexfield has not yet been deployed so the patched 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.

Configuring Descriptive Flexfields for Transactional Business Intelligence

Configuring Descriptive Flexfields for Transactional Business Intelligence: Overview

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 custom 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.

Configuring Descriptive Flexfield Segments: Procedure

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. Navigate to the Setup and Maintenance window.
2. Navigate to the Manage Descriptive Flexfields window.
3. If the **BI Enabled** option is cleared, select it.
4. Select the options for deployment of the descriptive flexfields.

Setting Descriptive Flexfields as BI-Enabled: Procedure

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. Navigate to **Setup and Maintenance** work area.
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**.

Importing Changes to Flexfields Automatically

Importing Flexfield Changes: Overview

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 is 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 Business Intelligence Enterprise Edition 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.

Running the Import Scheduled Process: Procedure

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

Running 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 Flex changes were detected in any of the Oracle Applications Cloud sources; because the Oracle Business Intelligence is already synchronized with all Flex changes, no changes were made in the Oracle Business Intelligence.
- **COMPLETED:** Oracle Business Intelligence was successfully updated with Flex changes and uploaded into the Oracle Business Intelligence Server.
- **COMPLETED: PROCESS_ERRORS:** Oracle Business Intelligence was updated with the Flex 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.

Disabling 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.

Disabling Key Flexfields as BI-Enabled: Procedure

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. Navigate to **Manage Key Flexfields**.
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**.

Disabling Descriptive Flexfields as BI-Enabled: Procedure

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. Navigate to **Setup and Maintenance**.
2. Navigate to the **Edit Descriptive Flexfields** window.
3. Enter the **Descriptive Flexfield Name**.
4. Deselect the **BI Enabled** option on the desired descriptive flexfields.
5. Click **OK**, then **Save**.

Disabling Extensible Flexfields as BI-Enabled: Procedure

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. Navigate to **Setup and Maintenance**, then **Manage Extensible Flexfields**.
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 displayed at the bottom of the screen.
9. Click **Save**.

Dimensions Supported by Descriptive Flexfields

Financials Descriptive Flexfields for Business Intelligence

This table shows the Financials product area dimensions supported by descriptive flexfields.

DFF Code	Dimension Name
AP_CHECKS	Dim - AP Disbursement Details
AP_HOLDS	Dim - AP Hold Details
AP_INVOICE_DISTRIBUTIONS	Dim - AP Transaction Details
AP_INVOICE_LINES	Dim - AP Transaction Details
AP_INVOICES	Dim - AP Transaction Details
AP_PAYMENT_SCHEDULES	Dim - AP Payment Schedule Details
AP_TERMS_B	Dim - AP Terms
AR_ADJUSTMENTS	Dim - AR Adjustment Details

DFF Code	Dimension Name
AR_APPROVAL_ACTION_HISTORY	Dim - AR Adjustment Approval Action History Details
AR_CASH_RECEIPTS	Dim - AR Standard Receipt Details
AR_MISC_CASH_DISTRIBUTIONS	Dim - AR Miscellaneous Receipt Details
AR_PAYMENT_SCHEDULES	Dim - AR Payment Schedule Details
AR_RATE_ADJUSTMENTS	Dim - AR Receipt Rate Adjustment Details
AR_RECEIPT_CLASSES	Dim - AR Receipt Method
AR_RECEIPT_METHODS	Dim - AR Receipt Method
AR_RECEIVABLE_APPLICATIONS	Dim - AR Standard Receipt Details
AR_REVENUE_ADJUSTMENTS	Dim - AR Revenue Adjustment Details
CE_BANK_ACCOUNTS	Dim - CE Bank Accounts
CE_EXTERNAL_TRANSACTIONS	Dim - CE External Cash Transaction Details
CE_STATEMENT_HEADERS	Dim - CE Bank Statement Details
CE_STATEMENT_LINES	Dim - CE Bank Statement Details
FA_ADDITIONS	Dim - Fixed Asset
FA_ASSET_INVOICES	Dim - Asset Source Lines Details
FA_BOOK_CONTROLS	Dim - Asset Book
FA_CALENDAR_TYPES	Dim - Date Fixed Assets Calendar
FA_CATEGORIES	Dim - Asset Category
FA_CATEGORY_BOOKS	Dim - Asset Category Book
FA_FISCAL_YEAR	Dim - Date Fixed Assets Calendar
FA_LOCATIONS	Dim - Asset Location
FA_RETIREMENTS	Dim - Asset Retirement Details

DFF Code	Dimension Name
FA_TRANSACTION_HEADERS	Dim - Asset Transaction History Details
FUN_DIST_LINES	Dim - Intercompany Transaction Distribution Details
FUN_TRX_BATCHES	Dim - Intercompany Transaction Distribution Details
FUN_TRX_HEADERS	Dim - Intercompany Transaction Distribution Details
GL_CODE_COMBINATIONS	Dim - GL Account
GL_JE_BATCHES	Dim - GL Journal Details
GL_JE_CATEGORIES	Dim - GL Journal Category
GL_JE_HEADERS	Dim - GL Journal Details
GL_JE_LINES	Dim - GL Journal Details
GL_JE_SOURCES	Dim - GL Journal Source
GL_LEDGERS	Dim - Ledger
GL_PERIOD_STATUSES	Fact - Fins - GL Period Statuses
GL_PERIODS	Dim - Date Fiscal Calendar
Payroll Developer DF	Dim - Payroll
RA_CUST_TRX_LINE_GL_DIST	Dim - AR Transaction Details
RA_CUST_TRX_LINE_SALESREPS	Dim - AR Transaction Details
RA_CUST_TRX_TYPES	Dim - AR Transaction Type
RA_CUSTOMER_TRX	Dim - AR Transaction Details
RA_CUSTOMER_TRX_LINES	Dim - AR Transaction Details
RA_RULES	Dim - AR Accounting Rule
RA_TERMS	Dim - AR Payment Terms
RA_TERMS_LINES	Dim - AR Payment Terms

DFF Code	Dimension Name
VRM_FMV_LINES	Dim - VRM FMV Line Details
VRM_FMV_LINE_SETS	Dim - VRM FMV Set Details
VRM_FMV_TEMPLATES_B	Dim - VRM FMV Profile
VRM_FMV_TEMPL_ASSIGNMENTS	Dim - VRM FMV Profile
VRM_ITEM_GROUPS_VL	Dim - VRM FMV ItemType
VRM_MEA_RULES_VL	Dim - VRM MEA Rules
VRM_PRICE_EFF_PERIODS_VL	Dim - VRM FMV Effective Period
VRM_REV_DOCUMENTS	Dim - VRM Recognition Details
VRM_REV_DOC_LINES	Dim - VRM Recognition Details
VRM_REV_DOC_LINE_SCHEDULES	Dim - VRM Recognition Details
VRM_REV_DOC_LINE_SPLITS_ALL	Dim - VRM Recognition Details
VRM_SOURCE_DOCUMENTS	Dim - VRM Source Document Details
VRM_SOURCE_DOC_LINES	Dim - VRM Source Document Details
XLA_AE_HEADERS	Dim - SLA Journal Details
XLA_AE_LINES	Dim - SLA Journal Details
XLE_ETB_INFO_DEV	Dim - Legal Entity
XLE_LE_ADD_INFO	Dim - Legal Entity
XLE_LE_INFO_DEV	Dim - Legal Entity

Human Capital Management Descriptive Flexfields for Business Intelligence

This table shows the Human Capital Management product area dimensions supported by descriptive flexfields.

DFF Code	Dimension Name
ANC_PER_ABS_ENTRIES_DFF	Dim - Assignment Absences Details
HRA_DOC_TYPES_B	Dim - Document Type
HRA_EVAL_ITEMS	Dim - Performance Document Section Item
HRA_EVAL_RATINGS	Dim - Document and Rating Details
HRA_EVALUATIONS	Dim - Performance Document Status Details
HRA_SECTION_DEFNS_B	Dim - Performance Document Section
HRA_TMPL_DEFNS_B	Dim - Performance Template
HRA_TMPL_SECTIONS	Dim - Performance Document
HRG_GOAL_PLANS_B	Dim - Performance Goal Plan
HRG_GOALS	Dim - Performance Goals
HRM_PLAN_CANDIDATES	Dim - Succession Plan Candidates
HRR_MEETINGS	Dim - Talent Review Meeting
HRT_CONTENT_ITEMS_B	Dim - Content Item
HRT_PROFILE_ITEMS	Dim - Person Profile Details
HRT_RATING_LEVELS_B	Dim - Rating Level
HRT_RATING_MODELS_B	Dim - Rating Model
PAY_ALL_PAYROLLS_DDF	Dim - Payroll
PER_ABSENCE_DFF	Dim - Assignment Absences Details
PER_ACT_DFF	Dim - HR Action

DFF Code	Dimension Name
PER_ACT_LEG_DDF	Dim - HR Action
PER_ACT_REASONS_DFF	Dim - HR Action Reason
PER_ADDRESSES_DFF	Dim - Worker Location
PER_ALLOCATED_CHECKLISTS_DFF	Dim - Checklist Task Details
PER_ALL_PEOPLE_DFF	Dim - Person Details
PER_ASG_DFF	Dim - Worker Assignment Details
PER_ASG_LEG_DDF	Dim - Worker Assignment Details
PER_CHECKLISTS_DFF	Dim - Checklist Task Template
PER_CITIZENSHIPS_DFF	Dim - Person Citizenship
PER_CONTACT_RELSHIPS_DFF	Dim - Person Contact Relationship
PER_CONTRACT_DFF	Dim - Employment Contract Details
PER_CONTRACT_LEG_DDF	Dim - Employment Contract Details
PER_DOCUMENTS_OF_RECORD_DFF	Dim - Document of Record Details
PER_DOC_OF_RECORD_LEG_DDF	Dim - Document of Record Details
PER_DRIVERS_LICENSE_TYPES_DFF	Dim - Person Driver License
PER_EMAIL_ADDRESSES_DFF	Dim - Person Email Addresses
PER_ETHNICITIES_DFF	Dim - Person Ethnicity
PER_EVALUATION_CRITERIA_DFF	Dim - Job
PER_GRADES_DFF	Dim - HR Grade
PER_JOB_FAMILY_DFF	Dim - Job
PER_JOBS_DFF	Dim - Job

DFF Code	Dimension Name
PER_LOCATIONS_DF	Dim - Worker Location
PER_NATIONAL_IDENTIFIERS_DFF	Dim - Person National Identifiers
PER_ORGANIZATION_UNIT_DFF	Dim - Department
PER_PERSONDRIVERS_LICENSE_LEG_DDF	Dim - Person Driver License
PER_PERSON_ADDR_USG_DFF	Dim - Person Address
PER_PERSON_ALLOCATED_TASKS_DFF	Dim - Checklist Task Details
PER_PERSON_CONTACT_RELATIONSHIP_DDF	Dim - Person Contact Relationship
PER_PERSON_DLVRV_METHODS_DFF	Dim - Person Delivery Methods
PER_PERSON_LEGISLATIVE_DATA_LEG_DDF	Dim - Person Legislative Information
PER_PERSON_LEGISLATIVE_DFF	Dim - Person Legislative Information
PER_PERSON_NAME_DFF	Dim - Person Names
PER_PERSON_NAME_LEG_DDF	Dim - Person Names
PER_PERSON_PASSPORT_LEG_DDF	Dim - Person Passport Details
PER_PERSON_TYPE_USG_DFF	Dim - Person Type
PER_PERSON_VISA_LEG_DDF	Dim - Person Work Permit
PER_PERSONS_DFF	Fact - Person
PER_PHONES_DFF	Dim - Person Phones
PER_POSITIONS_DFF	Dim - HR Position
PER_PPS_DFF	Dim - Work Relationship Details
PER_PPS_LEG_DDF	Dim - Work Relationship Details

DFF Code	Dimension Name
PER_RATE_VALUES_DFF	Fact - Grade Rate
PER_RATES_DF	Dim - Grade Rate
PER_RELIGIONS_DFF	Dim - Person Religion
PER_TASKS_IN_CHECKLIST_DFF	Dim - Checklist Task Template
PER_VISA_PERMIT_DFF	Dim - Person Work Permit

The table below lists extensible flexfields in HCM (Core HR and Payroll)

Extensible Flexfield	Number of Categories	Number of Contexts
PER_JOBS_EIT_EFF	1	0 (none seeded)
PER_LOCATION_INFORMATION_EFF	1	5 (none are multi-row context)
PER_POSITIONS_EIT_EFF	1	0 (none seeded)
PER_PERSON_EIT_EFF	1	9 (2 multi-row contexts)
PER_ASSIGNMENT_EIT_EFF	1	0
PAY_ELEMENT_INFORMATION_EFF	1	0
PER_JOBS_LEG_EFF	1	1
PER_LOCATION_LEG_EFF	1	5
PER_POSITIONS_LEG_EFF	1	0
PER_ORGANIZATION_INFORMATION_EFF	9	
• Category - Department		4 (1 multi-row context)
• Category - Enterprise		4 (no multi-row contexts)
• Category - Disability Organization		0
• Category - Division		1
• Category - Legal Employer		16 (2 multi-row contexts)

Extensible Flexfield	Number of Categories	Number of Contexts
<ul style="list-style-type: none"> Category - Professional Body 		0
<ul style="list-style-type: none"> Category - Payroll Statutory Unit 		76 (1 multi-row context)
<ul style="list-style-type: none"> Category - Reporting Establishment 		1
<ul style="list-style-type: none"> Category - Tax Reporting Unit 		98 (3 multi-row contexts)

Incentive Compensation Descriptive Flexfields for Business Intelligence

This table shows the Incentive Compensation product area dimensions supported by descriptive flexfields.

DFF Code	Dimension Name
CN_COMP_PLANS_DFF	Dim - Compensation Plan
CN_MEASURES_DFF	Dim - Performance Measure
CN_PARTICIPANT_DETAIL_DFF	Dim - Participant Details
CN_PLAN_COMPONENTS_DFF	Dim - Plan Component
CN_TP_BASETRANS_DFF	Dim - Participant Transaction Details

Procurement Descriptive Flexfields for Business Intelligence

This table shows the Procurement product area dimensions supported by descriptive flexfields.

DFF Code	Dimension Name
PO_ATTRIBUTE_VALUES	Dim - Purchase Agreement Details
PO_DISTRIBUTIONS	Dim - Purchase Order Details
PO_DOCUMENT_TYPES	Dim - Purchase Order Transaction Type
PO_HEADERS	Dim - Purchase Order Details

DFF Code	Dimension Name
PO_LINE_LOCATIONS	Dim - Purchase Order Details
PO_LINE_TYPES	Dim - Purchase Line Type
PO_LINES	Dim - Purchase Order Details
PO_NOTIFICATION_CONTROLS	Dim - Agreement Notification Controls
PON_AUCTION_HEADERS	Dim - Sourcing Negotiation Details
PON_AUCTION_ITEM_PRICES	Dim - Sourcing Negotiation Details
PON_AUCTION_SUPPLIER_HEADERS	Dim - Sourcing Negotiation Details
POR_REQ_DISTRIBUTIONS	Dim - Purchase Requisition Details
POR_REQUISITION_HEADERS	Dim - Purchase Requisition Details
POR_REQUISITION_LINES	Dim - Purchase Requisition Details
POZ_SUPPLIER_SITES_ALL_M	Dim - Supplier Sites
POZ_SUPPLIERS	Dim - Supplier

Projects Descriptive Flexfields for Business Intelligence

This table shows the Projects product area dimensions supported by descriptive flexfields.

DFF Code	Dimension Name
ContractHeaderFlexfield	Dim - Project Contract
OKC_LINES_DESC_FLEX	Dim - Project Contract
PJB_BILLING_EVENTS_FLEX	Dim - Event
PJB_INVOICE_HEADERS_FLEX	Dim - Project Invoice Details
PJB_INVOICE_LINES_FLEX	Dim - Project Invoice Details
PJC_EXP_ITEMS_DESC_FLEX	Dim - Project Costing Details

DFF Code	Dimension Name
PJC_TXN_XFACE_DESC_FLEX	Dim - Project Unprocessed Transaction Details
PJF_CLASS_CATEGORIES_DESC_FLEX	Dim - Project
PJF_CLASS_CODES_DESC_FLEX	Dim - Project
PJF_EXP_CATEGORIES_DESC_FLEX	Dim - Financial Resource
PJF_EXP_TYPES_DESC_FLEX	Dim - Financial Resource
PJF_NONLAB_RES_DESC_FLEX	Dim - Non Labor Resource
PJF_PROJECT_CLASS_CODE_DESC_FLEX	Dim - Project
PJF_PROJECT_TYPES_DESC_FLEX	Dim - Project
PJF_PROJECTS_DESC_FLEX	Dim - Project
PJF_TASK_STRUCTURE_DFF	Dim - Task
PJF_WORK_TYPES_DESC_FLEX	Dim - Work Type
PJO_PLAN_LINES_DFF	Dim - Project Budget Details
PJO_PLANNING_OPTIONS_DFF	Dim - Project Budget Version
PROJECTS_STD_COST_COLLECTION	Dim - Project Costing Details
PROJECTS_STD_COST_COLLECTION	Dim - Project Unprocessed Transaction Details

Supply Chain Management Descriptive Flexfields for Business Intelligence

This table shows the Supply Chain Management product area dimensions supported by descriptive flexfields.

DFF Code	Dimension Name
CARRIER_ORGANIZATION	Dim - Shipping Method

DFF Code	Dimension Name
CST_ANALYSIS_CODES_B	Dim - Cost Analysis Group
CST_ANALYSIS_GROUPS_B	Dim - Cost Analysis Group
CST_COST_BOOKS_B	Dim - Cost Organization Book
CST_COST_ELEMENTS_B	Dim - Cost Element
CST_COST_ORG_BOOKS	Dim - Cost Organization Book
CST_ELEMENT_ANALYSIS_GROUPS	Dim - Cost Analysis Group
CST_VAL_STRUCTURES_B	Dim - Cost Valuation Unit
CST_VAL_UNITS_B	Dim - Cost Valuation Unit
DOO_PROCESS_DEFS_ADD_INFO	Dim - DOO Process
DOO_PROCESS_STEPS_ADD_INFO	Dim - Step
DOO_TASK_TYPES_ADD_INFO	Dim - Primary Task
EGO_CHANGE_LINE	Dim - New Item Request Line Details
EGO_ENGINEERING_CHANGES	Dim - New Item Request Details
EGP_CATEGORY_DFF	Dim - Item
EGP_CATEGORY_SETS_DFF	Dim - Item
EGP_COMPONENT_DFF	Dim - PIM - Components Details
EGP_ITEM_CLASS_DFF	Dim - PIM - Item Class
EGP_ITEM_RELATIONSHIPS_DFF	Dim - Cross Reference Item Details
EGP_ITEM_REVISIONS_DFF	Dim - PIM - Item and Revisions Details
EGP_REFERENCE_DESIGNATOR_DFF	Dim - PIM - Reference Designator
EGP_STRUCTURE_HEADER_DFF	Dim - PIM - Structure Details
EGP_SUBSTITUTE_COMPONENT_DFF	Dim - PIM - Substitute Component

DFF Code	Dimension Name
EGP_SYSTEM_ITEMS_DFF	Dim - Item
EGP_TRADING_PARTNER_ITEMS_DFF	Dim - Trading Partner Item Details
GMS_AWARD_HEADERS_DFF	Dim - Award
GMS_AWARD_PERSONNEL_DFF	Dim - Personnel
GMS_AWARD_PROJECTS_DFF	Dim - Award Project
GMS_INSTITUTIONS_DFF	Dim - Award
INV_GRADES	Dim - Inventory Grade
INV_ITEM_LOCATIONS	Dim - Storage Location
INV_LOT_ATTRIBUTES	Dim - Inventory Lot
INV_LOT_NUMBERS	Dim - Inventory Lot
INV_MATERIAL_TXNS	Dim - Inventory Details
INV_ORG_PARAMETERS	Dim - Inventory Org
INV_SECONDARY_INVENTORIES	Dim - Storage Location
INV_TRANSACTION_REASONS	Dim - Receipt Transaction Reasons
INV_TRANSACTION_TYPES	Dim - Movement Types
INV_TXN_SOURCE_TYPES	Dim - Inventory Transaction Source Type
RCV_SHIPMENT_HEADERS	Dim - Inbound Shipment Details
RCV_SHIPMENT_LINES	Dim - Inbound Shipment Details
RCV_TRANSACTIONS	Dim - Receipt Details
WSH_CARRIERS	Dim - Carrier
WSH_DELIVERY_DETAILS	Dim - Sales Pick Details
WSH_NEW_DELIVERIES	Dim - Sales Pick Details

DFF Code	Dimension Name
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3 Managing Reports and Analyses

Managing Folders

Creating Folders: Procedure

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

Creating Folders

Follow these steps:

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**.

Addressing 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 a large number of folders to delete.

Setting Folder Permissions and Attributes: Procedure

Business intelligence catalog folder properties control folder permissions and other attributes. You can access the properties of any object or folder in the catalog to perform tasks such as viewing system information or changing attributes or ownership. All other users can only access and modify the properties of the objects that they create or own.

Setting Folder Properties

Follow these steps:

1. In the catalog, select the folder you want to assign properties to.
2. In the Tasks pane, click **Properties**.
3. In the Properties dialog box, select any of the options in the Attributes section:
 - Hidden: Specifies that the object is hidden.
 - System: Specifies that the object is a system object.
 - Read Only: Specifies that the object is read-only.
 - Do Not Index: Excludes the object from the index used by the full-text catalog search. Excluded objects do not 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.
 - o Set ownership of this item: Click to become the owner of the folder or object.
 - o Set ownership of this item and all sub items: 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.

Setting Folder Permissions: Procedure

You can assign permissions on folders and other objects.

Accessing and Setting 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 drop-down 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 drop-down 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, and the Apply permissions to items within a folder to assign them to objects in the folder but not to subfolders.

Moving Analyses and Reports: Procedure

You can archive to bundle the entire catalog, specific folders, or multi component objects as a .catalog file and upload the .catalog file to unarchive the data to another location in the catalog. Use the archive process to transfer specific data across environments, for example from a development environment to a production environment.

Creating an Archive

To create an archive file:

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:
 - o Keep Permissions: Maintain the object or folder's existing permissions. If you do not select this option, then the archiving process does not include any permissions. Upon 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 LastModified time is updated to indicate the time at which 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. You use the Old option to overwrite existing catalog items that are older than the catalog items in the archive.

If you do not select this option, then the archiving process does not include time information and the Old option in the Paste Overview area of the Preferences dialog box is not available.

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

Moving a File to a New Location

To unarchive a file:

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:** Select this option to replace any existing folders or objects with the same names as folders or objects included in the archive file that you are uploading.
 - **Old:** Select this option to replace folders or objects except those folders or objects that exist, unless they are older than the source.
 - **None:** Select this option to add any new folders or objects, but preserve any existing folders or objects.
 - **Force:** Select this option to add and replace all folders or objects.
5. Use the ACL option to specify how the folders or objects are assigned permissions using Access Control Lists (ACLs) when unarchived.
 - **Inherit:** Inherits the folder or object's permissions (ACL) from its new parent folder.
 - **Preserve:** Preserves the folder or object's permissions (ACL) as it was in the original, mapping accounts as necessary.
 - **Create:** Preserves the folder or object's permissions (ACL) as it was in the original, creating and mapping accounts as necessary.
6. Click **OK**.

Mapping to Work Areas

Setting Up the Reports and Analytics Pane: Procedure

You can find the Reports and Analytics pane in many work areas, and the analytics and reports you see in the pane depends on the work area. You can define what's available for a specific work area, by mapping reports from the business intelligence (BI) catalog to that work area. In this mapping context, reports refer to both analytics and reports. Your changes apply to all users who have access to the work area you're mapping.

Mapping Reports from Your Work Area

To map reports to the work area that you're in:

1. Click the **Edit Settings** icon in the Reports and Analytics pane.


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

2. Click **Select and Add**.
3. Find the report in the catalog and select it.
4. Click **OK**.
5. To remove any mapping, select the report and click **Remove**.
6. Save your work.

Mapping Reports to Any Work Area

To map reports to any work area that you have access to:

1. Go to the Setup and Maintenance work area and open 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. Find the report in the catalog and select it.
7. Click **OK**.
8. To remove any mapping, select the report and click **Remove**.

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

9. Save your work.

Related Topics

- [Reports and Analytics Pane: Explained](#)

Why can't I see reports when mapping reports to work areas for the Reports and Analytics pane?

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

Similarly, when you're selecting a report to map, you can see only the reports that you have access to. Ask your administrator to either:

- Assign you roles that have access to the reports you want to map to work areas.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to those reports.

Why can't I see reports when I edit settings for the Reports and Analytics pane?

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 a report to map, you can see only the reports that you have access to. Ask your administrator to either:

- Assign you roles that have access to the reports you want to map to work areas.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to those reports.

Scheduling

Setting Reports Up to Run as Scheduled Processes: Points to Consider

You can create a job definition for predefined or custom reports so that users can run them as scheduled processes. Use the Define Custom Enterprise Scheduler Jobs task in the Setup and Maintenance work area to create job definitions. Otherwise, users can open reports (which are set up to be run online) through the Reports and Analytics pane, or open and schedule them from the business intelligence catalog.

General Job Definition Information

This table describes the general information to enter for your job definition.

Field	What You Enter
Job Type	BIPJobType
Report ID	<div>The path to the report in the catalog, starting with the folder beneath Shared Folders, for example: Custom/ <Family Name>/ <Product Name>/<Report File Name>.xdo.</div> <div>Make sure to include the .xdo extension for the report definition.</div>
Default Output	A default output format.

Parameters

You can define parameters to be available to users when they submit scheduled processes based on your job definition. When users run the scheduled process, the values they enter for the parameters:


- Are passed to the data model that the report is using.
- Determine the data to be included in the report.

The parameters that you define must be in the same order as parameters in the data model. 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

 **Note:** Because you define parameters using the list of values sources from the Define Custom Enterprise Scheduler Jobs task, you should not define lists of values in the data model.

User Property

The only user property you need to define is **EXT_PortletContainerWebModule**. Only lists of values associated with the application that you select are made available for parameters in this job definition.

Related Topics

- [Managing Job Definitions: Highlights](#)
- [Managing List of Values Sources: Highlights](#)
- [Customizing Data Models: Procedure](#)
- [Creating Custom Reports: Procedure](#)

Setting Reports Up for Scheduling in the Reports and Analytics Pane: Procedure

You can set up reports as scheduled processes, which means 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 pane, then you must configure properties for the corresponding reports.

Enabling a Report for Scheduling

To enable scheduling in the Reports and Analytics pane:

1. Select the report in the business intelligence catalog and click **Edit**.
2. Click **Properties**.
3. On the General tab in the Properties dialog box, enter the following fields:

Field	Value
Enterprise Scheduler Job Package Name	The path for the job definition, for example: / oracle/ apps/ ess/<product family>/ <product>/ <business area>/ Jobs

Field	Value
Enterprise Scheduler Job Definition Name	The job definition name (not display name), for example: ABCDEFG

Related Topics

- [Accessing Report Components to Customize: Points to Consider](#)

4 Administering Business Intelligence Publisher Reports

Managing Report Delivery Servers: Overview

Oracle Business Intelligence Publisher, the report generation and delivery engine, requires configuration and tuning to deliver reports to users.

Report requests are received by Publisher from:

- Oracle Enterprise Scheduler
- The Reports and Analytics pane
- Application pages

Requests submitted through Oracle Enterprise Scheduler are processed by the Oracle BI Publisher scheduler. Requests submitted through the Reports and Analytics pane can be either real-time online requests or scheduled requests. Requests submitted through an application may invoke Oracle Enterprise Scheduler or may return report request results directly back to the application page.

Oracle BI Publisher is configured to accept requests from Oracle Applications Cloud. However, before you can deliver report documents to their destinations, you must define the delivery servers in Oracle BI Publisher. Use the Oracle BI Publisher Administration page to define your delivery servers.

Once delivery servers are defined, you can further configure the number of report processor and delivery threads to best handle your processing and delivery requirements. In addition, you can configure report properties for the system or at the report level to tune performance of your reports. To diagnose report processing issues, BI Publisher provides a set of scheduler diagnostics.

Navigating to the Oracle BI Publisher Administration Page: Procedure

You use the Oracle BI Publisher Administration Page to perform most tasks related to report delivery and performance.

Use the Oracle BI Publisher Administration page to:

- Configure delivery servers
- Manage report and delivery processors
- View scheduler diagnostics
- Set system properties and report runtime configuration properties

Request the Oracle Applications Cloud security administrator to assign the BI Platform Administrator duty role (BI stripe) to the person responsible for administering BI analyses, dashboards, and BI Publisher reports. Administration tasks include security permissions for objects, organizing objects into folders, accessing log files, and several other tasks.

Navigating to the Administration Page

To navigate to the Oracle BI Publisher Administration page:

1. Under Tools, click **Reports and Analytics**.
2. In the Reports and Analytics pane, click **Catalog**.
3. In the Catalog page, click **Administration**, then click **Manage BI Publisher**.

Configuring Report Delivery Servers: Procedure

Set up the report delivery servers to support printing.

Configuring Servers

To configure delivery servers:

1. From the BI Publisher Administration page, click **Delivery Configuration**.
2. Enter values in the Delivery Configuration Options tab to set general properties for email deliveries and notifications.
3. To configure a delivery server, click the appropriate tab.

Understanding the Report and Delivery Processors: Overview

When Oracle Enterprise Scheduler initiates a job, it is picked up by the BI Publisher scheduler queue.

- Job Processor: Listens for requests from the scheduler queue. When the job information is received, the job processor executes the data model (and splits the data for bursting jobs), stores the data in the shared temporary folder, and sends the report metadata to the report queue.
- Report Processor: Listens for requests from the report queue. When the report information is received, the report processor generates the report documents, stores it in the shared temporary folder and puts the delivery information in the delivery queue.
- Delivery Processor: Listens to the delivery queue and handles the delivery of reports for its channel. The delivery processors are:
 - Email Processor
 - File Processor
 - FTP Processor
 - Print Processor
 - WebDAV Processor
 - Fax Processor

Managing Report Processing and Delivery Server Load: Procedure

Manage the processors in the BI Publisher Scheduler Configuration page.

Managing Processing and Server Load

By default, each processor is enabled and the thread count for each is set to five. For each managed server that is running in the BI cluster, a table for that instance's processors is displayed. Use the table to enable or disable processors for the instance and configure the thread counts.

To configure processor threads:

1. From the BI Publisher Administration page, click **Scheduler Configuration**.
2. In the the Cluster Instances region of the Scheduler Configuration page, enter the Number Threads value in the processor configuration table.
3. All processors are automatically set to use the number of threads defined in the Threads Per JMS Processor value of the JMS Configuration region of the page. Enter a value in the Number Threads column to change the value from this default.

After performing the scale-out procedure, configure the processor threads for each cluster instance using the steps above.

Diagnosing Report Processing Issues: Procedure

The Scheduler Diagnostics page provides the runtime status of the scheduler. It provides status of its JMS configuration, JMS queues, cluster instances, scheduler Database, Top link, and Oracle Enterprise Scheduler.

Diagnosing Issues

To access the Scheduler Diagnostics page:

1. Navigate to the Oracle Business Intelligence Publisher **Administration** page.
2. In the System Maintenance group, click **Scheduler Diagnostics**.

Configuring System Properties for Reports: Procedure

Use the Oracle BI Publisher Runtime Configuration page to set the system-level runtime properties for reports.

Configuring Reporting Properties

To access the Runtime Configuration page:

1. Navigate to the Oracle Business Intelligence Publisher **Administration** page.

2. In the Runtime Configuration group, click **Properties**.

Glossary

analytics

Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

business intelligence catalog

The repository where all business intelligence objects, including analytics, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and custom objects.

data model

The metadata that determines where data for a report comes from and how that data is retrieved.

job definition

The metadata that determines what a job does and what options are available to users when they submit the scheduled process. A job is the executable for a scheduled process.

report

An output of select data in a predefined format that's optimized for printing.

scheduled process

A program that you run to process data and, in some cases, generate output as a report.

work area

A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.

