Oracle

SCM Cloud
Creating and Administering Analytics and Reports

Release 12

This guide also applies to on-premises implementations
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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.

Documentation Accessibility

For information about Oracle’s commitment to accessibility, see the Oracle Accessibility Program.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Overview

About This Guide

This guide is intended for advanced users and administrators who want to modify and create custom analytics and reports, as well as perform setup and maintenance tasks for business intelligence. The guide contains both conceptual and procedural information intended to help you build and manage analyses, reports, and dashboards that are tailored to the content needs of your line of business or company. You can also use the information in this guide to help you set up business intelligence.

Creating and Administering SCM Analytics and Reports: Overview

Business intelligence enables you to analyze data to gain insight that you can act on, gathering information to meet specific requirements. You can use different types of predefined analytics and reports, or create and edit them, to support your business needs.

Types of Business Intelligence

This table describes the purpose of analytics and reports.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>An interactive display of data, for example in a table or graph.</td>
<td>To summarize or break down simple, real-time data, and help you make short-term decisions.</td>
</tr>
<tr>
<td>Dashboard</td>
<td>A collection of analyses and other content, presented on one or more pages, or tabs.</td>
<td>To get various pieces of information about a particular subject.</td>
</tr>
<tr>
<td>Report</td>
<td>Output of data in a readable, predefined format.</td>
<td>To get high-volume data in an output optimized for printing, including documents to support internal operations, statutory requirements, and other business needs.</td>
</tr>
</tbody>
</table>

For a list of predefined analytics and reports, see Oracle Supply Chain Management Cloud: View Supply Chain Management Reports on the Oracle Help Center.
Customization of Analytics and Reports

You can create and edit analytics and reports for your own use. Or, if you have the appropriate roles, you can customize for others. For example, you can:

- Add or remove columns from an analysis.
- Change the branding logo on report output.
- Create a dashboard to include your most commonly viewed analyses.

Setup and Administration

Administrators perform setup and administration tasks to manage how you or how other users use and customize analytics and reports. For example, you can:

- Configure Oracle Business Intelligence Publisher, the tool used for generating and customizing reports.
- Define flexfields to provide custom attributes that can be used in analyses.
- Archive analytics and reports and move them from one environment to another.

Related Topics

- Oracle Supply Chain Management Cloud: View Supply Chain Management Reports and Analyses
- Oracle Supply Chain Management Cloud: View Setup Reports and Analyses

Securing SCM Analytics and Reports: Overview

All users with appropriate roles can create and access analyses and reports based on role access to subject areas and catalog folders.

Analyses and reports are secured by applying job roles with associated duty roles to users. Duty role assignments determine access to subject areas for analyses as well as catalog folders. For information about the job and duty roles provided with SCM and how to customize your security model by creating custom job roles and assigning duty roles to them, see the Oracle SCM Cloud: Securing Oracle SCM Cloud guide.

In addition to folder and object access, duty roles also determine data security. Each of the duty roles that provides access to subject areas and catalog folders is granted one or more data security policies that allow access to the data.

How can I find analytics and reports?

See if the analysis or dashboard already appears on your page, maybe on a separate tab. Or there might be, for example, a link to the report you want to use. Also look for the Reports and Analytics pane, which may appear on your work area as a panel tab or in the regional area. In the pane, you find analytics and reports specific to the work area you’re on.
To see all the analytics and reports that you have access to, use the Reports and Analytics work area (**Navigator - Tools - Reports and Analytics**).

### Reports and Analytics Pane: Explained

The Reports and Analytics pane is a central place for you to quickly view or run analytics and reports that are related to your work. If you have the permission, you can create and edit analytics and reports here, or add them from the business intelligence (BI) catalog to the pane. You may find this pane in a panel tab or in the regional area on some work areas. In the Reports and Analytics work area (**Navigator - Tools - Reports and Analytics**), the pane appears as the Contents pane.

#### What's In the Pane

This table describes what’s in the top level folders of the Reports and Analytics pane.

<table>
<thead>
<tr>
<th>Folder</th>
<th>Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>My Folders</td>
<td>Any custom analyses or reports that you saved for your own use only.</td>
</tr>
<tr>
<td>Shared Folders</td>
<td>• Any predefined analyses and reports that are relevant to your role. Or, in the Reports and Analytics work area, all the analytics and reports that you have permissions to access. Any shared custom reports and analytics in the Custom subfolder. Place your shared reports and analytics in this folder to protect them during upgrades.</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Catalog Object</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>Analyses are used primarily by dashboards.</td>
<td>Report Components folder</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Dashboards organize analytical content and catalog objects, and present</td>
<td>Reporting group folder</td>
</tr>
<tr>
<td></td>
<td>them in a meaningful way.</td>
<td></td>
</tr>
<tr>
<td>Dashboard Prompt</td>
<td>Dashboard prompts allow users to filter dashboard content using provided</td>
<td>Prompts folder</td>
</tr>
<tr>
<td></td>
<td>values.</td>
<td></td>
</tr>
<tr>
<td>Filter</td>
<td>Filters are used in dashboards and analyses.</td>
<td>Prompts folder</td>
</tr>
<tr>
<td>Report</td>
<td>Reports are operational reports created in Business Intelligence Publisher.</td>
<td>Reporting group folder</td>
</tr>
<tr>
<td>Data Model</td>
<td>Subtemplates are used by reports created in Business Intelligence Publisher.</td>
<td>Data Models folder</td>
</tr>
<tr>
<td>Subtemplate</td>
<td>Data models are used by reports created in Business Intelligence Publisher.</td>
<td>Reporting group folder</td>
</tr>
</tbody>
</table>

**Saving Analytics and Reports: Points to Consider**

You save analyses, dashboards, and reports in the business intelligence (BI) catalog, along with other objects, including prompts and filters. The catalog has a hierarchy of folders, with My Folders and Shared Folders at the top. One important folder is Custom, which you find under Shared Folders and use to store your custom analytics and reports.

**My Folders**

You’re the only one who can access anything that you save in My Folders. You can see your saved items in My Folders on the Reports and Analytics work area, but not in My Folders in the Reports and Analytics pane on any other work area. The only exception is when you create an analysis using the wizard in the Reports and Analytics pane, and save it in My Folders. In this case, the analysis is available in the pane on all work areas.
Shared Folders
If you have the appropriate roles, you can also save in Shared Folders so that your custom analytics or reports are available to anyone with the right access. You should save objects under the Custom subfolder, which has subfolders organized by product family.

Regarding predefined analytics and reports in Shared Folders:

- You should save a copy of the predefined analysis or dashboard in the corresponding product family subfolder under the Custom folder, and edit only the copy. Directly edit predefined analytics only when necessary, to make sure that any references to the analysis or dashboard still work properly.
- 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.

Custom Folder
Keep all custom analytics and reports in the Custom folder so that:

- You ensure that customized copies of those objects are not affected during upgrades, which can change predefined analytics and reports outside the Custom folder. You might lose customizations saved outside the Custom folder during upgrades.
- You can easily find customized objects.
- You can edit objects in the Custom folder without compromising security on the original objects.

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.

Related Topics
- Creating and Editing Reports: Explained
- Creating and Editing Analytics: Highlights
- Using the Customize Option for Predefined Reports: Points to Consider

What happens to customized analytics and reports when a patch is applied?
All custom analytics and reports are preserved if you save them in the Custom subfolder within Shared Folders, or in My Folders in the business intelligence (BI) catalog. Changes to predefined analytics and reports outside the Custom folder are preserved only if the patch doesn’t include a new version of those BI objects. If the patch does include a new version of a predefined object that you edited outside the Custom folder, then:

- The new version overwrites the existing predefined object.
- 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 custom version.
If the patch includes a new version of both the predefined object and a folder in its file path, then:

- The new folder, along with the new version of the object, overwrites the existing predefined folder and object.
- A copy of the existing folder (along with your edited object) is automatically created. The folder is renamed to indicate that it’s a custom version, but your edited object is not renamed.

**Note:** Future patches won’t affect renamed custom objects or anything within a renamed custom folder.

### Setup and Administration Overview

#### 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.

### 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
Chapter 2

Setup and Configuration

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.

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

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

• 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.

Setting Up Currency

Why do I see amounts of zero in analyses?

The currency exchange rates might not be set up correctly. For example, you choose EUR as your preferred currency in general preferences, and your corporate currency is USD. Amounts in analyses are displayed in EUR after conversion from USD, based on the current exchange rate. But if the exchange rate between EUR and USD isn't set up, or if the conversion fails for any reason, then the amounts show as zero. If this happens, contact your help desk.

Configuring Business Intelligence Publisher

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.

Uploading PGP Public Key Files to GPG Keystore: Procedure
To support encrypted communication channel from the BI Publisher Server to an FTP site, you upload a PGP public key file to a GPG keystore on the cloud and then provide it to a registered FTP location.

Uploading PGP Keys
You upload, test, and delete PGP keys in the BI Publisher Administration page.
To upload PGP keys:

1. Navigate to the BI Publisher Administration page.
2. In the Security Center section, click the PGP Keys link to open the PGP Keys page.
3. In the PGP Keys section, click Browse and select the PGP key file in the Open dialog box.
4. Click OK.
5. Click Upload. After the file is uploaded, it is imported into the keystore and its details are visible in the PGP Keys table. If a key with the same ID is imported again, the file is overwritten.
6. Click the Download icon of the key in the Encrypted Test Output column of the PGP Keys table to download and decrypt a test output file using the secret key of the imported public key. Successful decryption confirms the encryption is working for your keys.

Deleting a PGP Key
To delete an imported public key, click the Delete icon.

Configuring an FTP Delivery Channel Using PGP Keys
To create an FTP channel:

1. Navigate to the BI Publisher Administration page.
2. In the Delivery section, click the FTP link to open the FTP page.
3. Add a new FTP Server and click Test Connection to test it. The Filter Command field is read-only and is updated automatically when you select a PGP key.
4. Select the PGP Key ID of the key you uploaded from the drop-down.
5. Select the `true` check box for Sign Output to sign the encrypted document. If you select this check box, a `-s` parameter is added to the existing filter command.
6. Test the connection again to confirm that an encrypted test file is sent to the remote directory. The FTP delivery channel can now be used in a scheduled job.
3 Subject Areas

Data Structure for Analytics: Explained

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:

<table>
<thead>
<tr>
<th>Column Type</th>
<th>Description</th>
<th>Example</th>
<th>Icon for Column Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fact</td>
<td>Provides a measure of something, meaning that the values are numbers.</td>
<td>Total</td>
<td>Blue ruler</td>
</tr>
<tr>
<td>Attribute</td>
<td>Represents a piece of information about a business object, with values that are dates, IDs, or text.</td>
<td>Start Date</td>
<td>Blue column</td>
</tr>
<tr>
<td>Hierarchy</td>
<td>Holds data values that are organized in a hierarchical manner.</td>
<td>Time, with sublevels: Year, Quarter, Month</td>
<td>Tree structure of blue rectangles</td>
</tr>
</tbody>
</table>

Subject Areas

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

Folders

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

- Fact folders:
  - Contain fact columns.
Subject Areas

- Are usually at the bottom of the 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**

- Creating and Editing Analytics: Highlights
- Creating and Editing Analyses with Advanced Features: Procedure
- Creating and Editing Analyses Using a Wizard: Procedure
- Customizing Data Models: Procedure

**SCM Subject Areas in Oracle Transactional Business Intelligence: Explained**

To create a real-time analysis using Oracle Transactional Business Intelligence, select the subject area from which information is to be included in the analysis. For example, to create an analysis of item information, select a Product Management subject area. Subject areas are based around a business object or fact.

Oracle Transactional Business Intelligence is available for several functional areas in SCM including:

- Product Management
- Costing
- Inventory
- Receiving
- Shipping
- Order Management

Some sample predefined subject areas for SCM are:

- Product Management - Change Order Real Time
• Product Management - Trading Partner Item Real Time
• Costing - COGS And Gross Margin Real Time
• Costing - Inventory Valuation Real Time
• Inventory - Inventory Balance Real Time
• Inventory - Inventory Transactions Real Time
• Receiving - Interorganization Receipts Real Time
• Receiving - In Transit Shipments Real Time
• Distributed Order Orchestration - Fulfillment Lines Real Time
• Distributed Order Orchestration - Price Adjustments Real Time

Subject areas for Transactional Business Intelligence always include the suffix, Real Time. To view the complete list of predefined subject areas, click **Create** and select **Analysis** in the Reports and Analytics pane.

**Fact Folders and Dimension Folders**

Each subject area has one fact folder and a number of dimension folders. Fact folders contain attributes that can be measured, meaning that they are numeric values like past due fulfillment lines and item number. 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 at the bottom of the list of folders and are usually named after the subject area.
4 Flexfields

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

- 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 in Oracle Applications Cloud.
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:
   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**
- Enabling Key Flexfield Segments for Business Intelligence: Points to Consider

**Supported Key Flexfields: Overview**

Key flexfields are used to store internally defined codes unique to a particular business, specifying part numbers, general ledger accounts, and other business entities.

<table>
<thead>
<tr>
<th>Product Area</th>
<th>Key Flexfield</th>
<th>Dimension</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed Assets</td>
<td>Category (CAT#)</td>
<td>Dim - Asset Category</td>
</tr>
<tr>
<td>Fixed Assets</td>
<td>Location (LOC#)</td>
<td>Dim - Asset Location</td>
</tr>
<tr>
<td>General Ledger</td>
<td>Accounting (GL#)</td>
<td>Dim - Balancing Segment</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dim - Cost Center</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Dim - Natural Account</td>
</tr>
<tr>
<td>Payroll</td>
<td>Costing</td>
<td>Dim - Costing Segments</td>
</tr>
</tbody>
</table>
Mapping Non-Qualified Segments to BI Objects: Procedure

To map non-qualified segments that need to 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. From Manage Key Flexfields, search for the appropriate key flexfield code.
2. From the Actions menu, select Manage Segment Labels.
3. Click the Add Row icon.
4. 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.

<table>
<thead>
<tr>
<th>Key Flexfield</th>
<th>BI Object Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounting (GL)</td>
<td>Dim - GL Segment1 through Dim - GL Segment10</td>
</tr>
<tr>
<td>Budgetary Control (XCC)</td>
<td>Dim - XCC Segment1 through Dim - XCC Segment10</td>
</tr>
<tr>
<td>Revenue Management (VRM)</td>
<td>Dim - VRM Segment 1 through Dim - VRM Segment 10</td>
</tr>
</tbody>
</table>

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

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
- 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 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.

<table>
<thead>
<tr>
<th>Accounting Key Flexfield Segment</th>
<th>Segment Label</th>
<th>Transactional Business Intelligence GL Accounting Segment Logical Dimension</th>
</tr>
</thead>
<tbody>
<tr>
<td>Balancing</td>
<td>GL_BALANCING</td>
<td>Dim - Balancing Segment</td>
</tr>
<tr>
<td>Natural Account</td>
<td>GL_ACCOUNT</td>
<td>Dim - Natural Account Segment</td>
</tr>
<tr>
<td>Cost Center</td>
<td>FA_COST_CTR</td>
<td>Dim - Cost Center</td>
</tr>
<tr>
<td>Other segments to be equalized</td>
<td>Other unique segment label</td>
<td>Dim - GL Segment n where n is an integer from 1 to 10</td>
</tr>
</tbody>
</table>
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 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. 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.

Related Topics

- Specifying Performance Options for a Tree Structure: Points to Consider
- Deploying Flexfields Using the Command Line: Explained
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.

Configuring Extensible Flexfields for Transactional Business Intelligence

Configuring Extensible Flexfields in SCM: Procedure

You can use extensible flexfields to configure more segments.

An extensible flexfield is similar to a descriptive flexfield in that it provides a customizable 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.

Note: To be able to view the Oracle Innovation Management Cloud custom attributes in subject areas and use them, you must ensure that they are BI enabled.

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.

Configuring Extensible Flexfields

To configure extensible flexfields:

1. Open the Manage Extensible Flexfield task in the Setup and Maintenance work area.
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: Explained
Setting Extensible Flexfields as BI-Enabled: Procedure

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

Related Topics

- Configuring Extensible Flexfields: Procedure

Essbase Rule File and Cubes: Overview

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 Flex changes were detected in any of the Oracle Applications Cloud sources; because the RPD is already synchronized with all Flex changes, no changes were made in the RPD.
- COMPLETED: The RPD was successfully updated with Flex changes and uploaded into the Oracle Business Intelligence server.
- FAILED: Error conditions exist which require manual intervention.

Related Topics

- Submitting Scheduled Processes and Process Sets: Procedure

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**
Supply Chain Management Descriptive Flexfields for Business Intelligence

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

<table>
<thead>
<tr>
<th>DFF Code</th>
<th>Dimension Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARRIER_ ORGANIZATION</td>
<td>Dim - Shipping Method</td>
</tr>
<tr>
<td>CST_ ANALYSIS_ CODES_B</td>
<td>Dim - Cost Analysis Group</td>
</tr>
<tr>
<td>CST_ ANALYSIS_ GROUPS_B</td>
<td>Dim - Cost Analysis Group</td>
</tr>
<tr>
<td>CST_ COST_BOOKS_B</td>
<td>Dim - Cost Organization Book</td>
</tr>
<tr>
<td>CST_ COST_ ELEMENTS_B</td>
<td>Dim - Cost Element</td>
</tr>
<tr>
<td>CST_ COST_ ORG_BOOKS</td>
<td>Dim - Cost Organization Book</td>
</tr>
<tr>
<td>CST_ ELEMENT_ ANALYSIS_ GROUPS</td>
<td>Dim - Cost Analysis Group</td>
</tr>
<tr>
<td>CST_ VAL_ STRUCTURES_B</td>
<td>Dim - Cost Valuation Unit</td>
</tr>
<tr>
<td>CST_ VAL_UNITS_B</td>
<td>Dim - Cost Valuation Unit</td>
</tr>
<tr>
<td>DOO_ PROCESS_ DEFS_ADD_INFO</td>
<td>Dim - DOO Process</td>
</tr>
<tr>
<td>DOO_ PROCESS_ STEPS_ADD_INFO</td>
<td>Dim - Step</td>
</tr>
<tr>
<td>DOO_ TASK_ TYPES_ADD_INFO</td>
<td>Dim - Primary Task</td>
</tr>
<tr>
<td>EGO_ CHANGE_LINE</td>
<td>Dim - New Item Request Line Details</td>
</tr>
<tr>
<td>EGO_ ENGINEERING_CHANGES</td>
<td>Dim - New Item Request Details</td>
</tr>
<tr>
<td>EGP_ CATEGORY_DFF</td>
<td>Dim - Item</td>
</tr>
<tr>
<td>EGP_ CATEGORY_SETS_DFF</td>
<td>Dim - Item</td>
</tr>
<tr>
<td>EGP_ COMPONENT_DFF</td>
<td>Dim - PIM - Components Details</td>
</tr>
<tr>
<td>EGP_ ITEM_CLASS_DFF</td>
<td>Dim - PIM - Item Class</td>
</tr>
<tr>
<td>EGP_ ITEM_RELATIONSHIPS_DFF</td>
<td>Dim - Cross Reference Item Details</td>
</tr>
<tr>
<td>DFF Code</td>
<td>Dimension Name</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>------------------------------------------</td>
</tr>
<tr>
<td>EGP_ ITEM_ REVISIONS_DFF</td>
<td>Dim - PIM - Item and Revisions Details</td>
</tr>
<tr>
<td>EGP_ REFERENCE_ DESIGNATOR_ DFF</td>
<td>Dim - PIM - Reference Designator</td>
</tr>
<tr>
<td>EGP_ STRUCTURE_ HEADER_DFF</td>
<td>Dim - PIM - Structure Details</td>
</tr>
<tr>
<td>EGP_ SUBSTITUTE_ COMPONENT_DFF</td>
<td>Dim - PIM - Substitute Component</td>
</tr>
<tr>
<td>EGP_ SYSTEM_ ITEMS_DFF</td>
<td>Dim - Item</td>
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<td>EGP_ TRADING_ PARTNER_ ITEMS_DFF</td>
<td>Dim - Trading Partner Item Details</td>
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<td>GMS_ AWARD_ PROJECTS_DFF</td>
<td>Dim - Award Project</td>
</tr>
<tr>
<td>GMS_ INSTITUTIONS_ DFF</td>
<td>Dim - Award</td>
</tr>
<tr>
<td>INV_GRADES</td>
<td>Dim - Inventory Grade</td>
</tr>
<tr>
<td>INV_ ITEM_ LOCATIONS</td>
<td>Dim - Storage Location</td>
</tr>
<tr>
<td>INV_ LOT_ ATTRIBUTES</td>
<td>Dim - Inventory Lot</td>
</tr>
<tr>
<td>INV_ LOT_NUMBERS</td>
<td>Dim - Inventory Lot</td>
</tr>
<tr>
<td>INV_ MATERIAL_TXNS</td>
<td>Dim - Inventory Details</td>
</tr>
<tr>
<td>INV_ ORG_ PARAMETERS</td>
<td>Dim - Inventory Org</td>
</tr>
<tr>
<td>INV_ SECONDARY_INVENTORIES</td>
<td>Dim - Storage Location</td>
</tr>
<tr>
<td>INV_ TRANSACTION_REASONS</td>
<td>Dim - Receipt Transaction Reasons</td>
</tr>
<tr>
<td>INV_ TRANSACTION_TYPES</td>
<td>Dim - Movement Types</td>
</tr>
<tr>
<td>INV_TXN_SOURCE_TYPES</td>
<td>Dim - Inventory Transaction Source Type</td>
</tr>
<tr>
<td>RCV_SHIPMENT_HEADERS</td>
<td>Dim - Inbound Shipment Details</td>
</tr>
<tr>
<td>DFF Code</td>
<td>Dimension Name</td>
</tr>
<tr>
<td>--------------------------</td>
<td>------------------------------------</td>
</tr>
<tr>
<td>RCV_ SHIPMENT_LINES</td>
<td>Dim - Inbound Shipment Details</td>
</tr>
<tr>
<td>RCV_ TRANSACTIONS</td>
<td>Dim - Receipt Details</td>
</tr>
<tr>
<td>WSH_CARRIERS</td>
<td>Dim - Carrier</td>
</tr>
<tr>
<td>WSH_ DELIVERY_DETAILS</td>
<td>Dim - Sales Pick Details</td>
</tr>
<tr>
<td>WSH_ NEW_DELIVERIES</td>
<td>Dim - Sales Pick Details</td>
</tr>
</tbody>
</table>
5 Analytics Customization

Creating and Editing Analytics: Highlights

Edit and create custom analytics to provide ad hoc reporting on your transactional data. The predefined analyses and dashboards help answer many of your business questions, but you can also create your own to meet custom requirements. This table gives a just a few examples of creating or editing analytics.

<table>
<thead>
<tr>
<th>Task</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create an analysis</td>
<td>Your team needs a simple list of all your accounts, sorted by account ID. You include the account name, ID, and address in a new analysis, and add sorting on the ID column.</td>
</tr>
<tr>
<td>Create a view</td>
<td>A predefined analysis has a bar graph. You save a custom version of this analysis with a table view and add it below the graph.</td>
</tr>
<tr>
<td>Create a view selector</td>
<td>You later decide that you want to toggle between viewing a table and a graph. You add a view selector that includes the table and graph views.</td>
</tr>
<tr>
<td>Edit a dashboard prompt</td>
<td>A predefined dashboard has a Start Date prompt. You make a copy of the dashboard and replace Start Date with a date range prompt.</td>
</tr>
<tr>
<td>Create a dashboard</td>
<td>You create a dashboard that includes an analysis and a report to view both together.</td>
</tr>
</tbody>
</table>

Tip: A wizard in the Reports and Analytics pane is available to help you create or edit analyses.

Data Source Customization

Administrators can customize the business intelligence (BI) repository to determine the columns available for you to use.

- They enable flexfields (which support custom attributes) for BI, and import them into the repository.
- You can then select attributes from flexfields to include in your analyses.

Related Topics

- Reports and Analytics Pane: Explained
- Data Structure for Analytics: Explained
- Configuring Flexfields for Use in Analyses: Overview

Analyses
Creating and Editing Analyses Using a Wizard: Procedure

You can use a wizard that guides you through creating and editing analyses. Even though the wizard doesn’t give you all available features, you can still use it to make typical changes, for example adding views or filters. For other tasks, such as creating dashboards or deleting analyses, use the advanced business intelligence features.

Creating an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click Create and select Analysis.
3. Select the subject area that has the columns you want for your analysis.
4. Optionally, add more subject areas or remove any that you no longer need.
5. Select the columns to include, set options for each column, and click Next.
6. Optionally, enter a title to appear at the top of the analysis, above the analysis name that you enter in the last step.
7. Select the type of table or graph to include, specify the layout of the views, and click Next.

Note: At any point after this step, you can click Finish to go to the last step, to save your analysis.
8. Optionally, set more options for the table or graph, and click Next.
9. Optionally, add sorts or filters based on any of the columns you included, and click Next.
10. If you have a table, optionally define conditional formatting for select columns, for example to display amounts over a certain threshold in red. Click Next.
11. Enter the name of your analysis and select a folder to save it in.
12. Click Submit.

Editing an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics if available in other work areas where you can find the analysis.
2. Select your analysis in the pane and click Edit.
3. Perform steps 4 through 10 from the preceding Creating an Analysis task, as needed.
4. To update an existing analysis, select the same name in the same folder. To save this analysis as a new copy, either name it with a new name or save it in a new folder.
5. Click Submit.

Related Topics

- Reports and Analytics Pane: Explained
- Saving Analytics and Reports: Points to Consider
- Data Structure for Analytics: Explained

Creating and Editing Analyses with Advanced Features: Procedure

Even though you can use a wizard to create or edit analyses, you might have to use advanced features for complicated analyses or specific requirements. For example, you can create view selectors so that users can toggle between views within an analysis, or define criteria for filters using SQL statements.
You can also perform other actions on analyses, for example delete them or copy and paste them within the business intelligence catalog.

**Creating or Editing an Analysis**

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click the **Browse Catalog** button.
3. Click the **New** button, select **Analysis** under **Analysis and Interactive Reporting**, and select a subject area.

   Or, select your analysis in the Folders pane and click **Edit**.

4. Use the tabs as described in this table.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>Select and define the columns to include.</td>
</tr>
<tr>
<td></td>
<td>Add filters.</td>
</tr>
<tr>
<td>Results</td>
<td>Add views and set options for results.</td>
</tr>
<tr>
<td>Prompts</td>
<td>Define prompts to filter all views in the analysis.</td>
</tr>
<tr>
<td>Advanced</td>
<td>View or update the XML code and logical SQL statement that the analysis generates.</td>
</tr>
<tr>
<td></td>
<td>Set options related to query performance.</td>
</tr>
</tbody>
</table>

5. Save your analysis.

**Performing Other Actions on an Analysis**

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas where you can find the analysis.
2. Select your analysis in the pane and click **More**.
3. Click **More** for your analysis and select the desired action, for example **Delete** or **Copy**.

**Related Topics**

- Reports and Analytics Pane: Explained
- Data Structure for Analytics: Explained
- Saving Analytics and Reports: Points to Consider

**Creating a Change Order Approval Cycle Time by Reason Analysis: Worked Example**

You are a product manager and you want to create an analysis to help you review change order approval cycle times. The approval times are to be analyzed by change reasons.
The following table summarizes key decisions for creating the analysis.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>What information to include?</td>
<td>• Change Order Approval Cycle Time</td>
</tr>
<tr>
<td></td>
<td>• Reason</td>
</tr>
<tr>
<td>What type of layout is required?</td>
<td>Table with a bar below it</td>
</tr>
<tr>
<td>Do the table columns require any special formatting?</td>
<td>Yes, for the purpose of easier scanning. For the table, associate colors with thresholds so that line items with approval cycle time of ten or more days are highlighted in red, and of five or fewer days are highlighted in green.</td>
</tr>
<tr>
<td>Is this analysis available for others to use?</td>
<td>No. Save it to My Folders.</td>
</tr>
</tbody>
</table>

To create an analysis of Change Order Approval Cycle time by Reason, complete these tasks:

1. Select columns
2. Define the layout
3. Add column formatting
4. Save the analysis

**Selecting Columns**

1. Navigate to Reports and Analytics work area.
2. Click Create.
3. Select Analysis.
4. In the Select Subject Area Window, select the Product Management - Change Order Real Time subject area.
5. On the Create Analysis: Select Columns page, expand the Product Management - Change Order Real Time folder.
6. Expand the Change Order folder.
7. Select Approval Cycle Time and click the Add icon button to move the column to the Selected Columns area.
8. Expand the Change Order Reason folder.
9. Select Change Order Reason and click the Add icon button to move the column to the Selected Columns area.
10. Click Next.

**Defining the Layout**

1. On the Create Analysis: Select Views page, enter Change Order Approval Cycle Time in the Name field.
2. Next to the Table field, click None to open the Table menu.
3. Select Table (recommended).
4. Next to the Graph field, click None to open the Graph menu.
5. Select Bar (recommended).
6. Use the default layout value of Table above Graph.
7. Click Next.
8. On the Create Analysis: Edit Table page, select Change Order Reason and click the Move selected item to top of list icon.
9. Click Next.
10. On the Create Analysis: Edit Graph page, click Next.
Adding Column Formatting

1. On the Create Analysis: Highlight page, click Add Column Format in the Formatting region.
2. Select Approval Cycle Time.
3. In the first Threshold field, enter 5, and click the down arrow in the first Color field. Select the color Green.
   
   **Tip:** If you hover over the colors, hover text will show the name of the color.
4. In the second Threshold field, enter 10, and click the down arrow in the third Color field. Select the color Red (leave the second color yellow).
5. Click Next.

Saving the Analysis

1. On the Create Analysis: Save page, enter Change Order Approval Cycle Time by Reason in the Analysis Name field, enter a description and then select My folders in the Save In region.
2. Click Submit.
3. Click OK.

Dashboards

Creating and Editing Dashboards: Procedure

You can create and edit dashboards to determine their content and layout. In addition to objects in the business intelligence (BI) catalog, such as analyses, reports, and prompts, you can add text, sections, and more to a dashboard.

Creating a Dashboard

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click Browse Catalog.
3. Click New and select Dashboard under Analysis and Interactive Reporting.
4. Enter the dashboard’s name and description, and select a folder to save in.
5. With the Add content now option selected, click OK.
6. Optionally, add more pages, or tabs, within the dashboard.
7. Drag and drop items from the Dashboard Objects or Catalog pane to add content to a page.
8. Click Save.

**Note:** The first dashboard page is saved with the page 1 name by default. To rename this page:
1. Click the Catalog link.
2. In the Folders pane, select your dashboard.
3. For page 1, click More and select Rename.
4. Enter the new name and click OK.

Editing a Dashboard

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas where you can find the dashboard.
2. Select your dashboard in the pane and click **More**.
3. Click **Edit**.
4. Perform steps 5 and 6 from the preceding Creating Dashboards task, and make other changes as needed, for example:
   - Remove content from the dashboard.
   - Drag and drop within a page to move content around.
   - Change the layout of a page.

*Related Topics*

- Saving Analytics and Reports: Points to Consider
- Reports and Analytics Pane: Explained
6 Reports Customization

Creating and Editing Reports: Explained

Use reports to generate and print documents for internal operations, external business transactions, or legal requirements. To meet specific requirements, you may need to create or edit reports to capture different data, or present data in another way.

Report Components

Each report has components that you can customize, as described in this table:

<table>
<thead>
<tr>
<th>Report Component</th>
<th>Description</th>
<th>Tool for Customizing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data model</td>
<td>Defines the data source, data structure, and parameters for the report. Multiple reports can use the same data model. Each report has one data model.</td>
<td>Data model editor in the application</td>
</tr>
</tbody>
</table>
| Layout           | Defines the presentation, formatting, and visualizations of the data. A report can have multiple layouts. There are different types of layout templates, for example Excel and RTF. | Depending on the template file type:  
  • XPT: Layout editor in the application  
  • RTF: Microsoft Word  
  • PDF: Adobe Acrobat Professional  
  • Excel: Microsoft Excel  
  • eText: Microsoft Word |
| Properties       | Specifies formatting and other settings for the report. | Report editor in the application |

What You Can Create or Edit

This table gives just a few examples of creating or editing reports.

<table>
<thead>
<tr>
<th>Task</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit the layout of a report.</td>
<td>Add your company logo to the report output.</td>
</tr>
<tr>
<td>Add a new layout to a report.</td>
<td>Design a new layout template that provides less detail than the existing template.</td>
</tr>
<tr>
<td>Edit a data model.</td>
<td>Add two fields to the data model used by a report so you can add those new fields to a custom layout for the report.</td>
</tr>
<tr>
<td>Create a new report based on a new data model.</td>
<td>Create a new data model based on data from an external system, and create reports using the custom data model.</td>
</tr>
</tbody>
</table>
Accessing Report Components to Customize: Points to Consider

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 pane, click **Browse Catalog** to open the BI catalog, and find your report or data model in the Folders pane.

• In the Reports and Analytics pane, 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.dll`) to open the catalog.

• Sign in to the BI 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 pane, change the final node of the URL. For example, change (`http://host:port/analytics/saw.dll`) 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 BI 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 custom 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 custom version.

If you don’t have access to the Customize option or don’t want the original version linked to the new report, then 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.

**Related Topics**

• Saving Analytics and Reports: Points to Consider

• What happens to customized analytics and reports when a patch is applied?
Using the Customize Option for Predefined Reports: Points to Consider

The Customize option automatically creates a custom copy of a predefined report and stores it in the **Shared Folders - Custom** within the business intelligence (BI) catalog. The custom copy includes the report definition, folder structure, and original report permissions, and is linked internally to the original report. You can edit the custom copy of the report, leaving the original report intact. When users open or schedule the original report, they are actually using the custom version.

Benefits of the Customize Option

In addition to conveniently copying a predefined report to the Custom folder, the Customize option:

- Makes it unnecessary to update processes or applications that invoke the report. For example, if the original report is set up to run as a scheduled process, you don’t need to change the setup. When users submit the same scheduled process, the custom report runs instead of the original.
- Automatically copies the security settings of the original report.
- Removes the risk of patches overwriting your edits. If a patch updates the original report, the custom report is not updated in any way.

\[ Note: \] The custom report still references the original data model. The data model is not copied. A patch that updates the data structure of the data model might affect your custom report.

Accessing the Customize Option

To access the Customize option:

2. In the Folders pane, select the predefined report.
3. Select **Customize** from the More menu for the report.
4. The copied report in the Custom folder opens, so proceed to edit this report.

To edit the custom report again later, you don’t need to be in the BI server. Just go to the BI catalog and either:

- Select the **Customize** or **Edit** option for the original report.
- Find your custom report in the Custom folder and select **Edit**.

**Related Topics**

- Saving Analytics and Reports: Points to Consider
- What happens to customized analytics and reports when a patch is applied?
Links Between Original and Custom Reports: Points to Consider

The Customize option for predefined reports creates a custom copy of the report that is linked to the original. Consider the following points when you work with both the original and custom versions.

Maintaining the Link Between Reports

The link between the predefined and custom report is based on the name of the custom report and its location within the Custom folder in the business intelligence (BI) catalog.

- If you manually create a report with the same name as a predefined report, and give it the same folder path under the Custom folder, then the new report becomes a custom version of the original. It would be as if you had used the Customize option to create the custom report.
- You can edit the custom report so that it uses a different data model. But if the original data model is updated later, then your custom report doesn’t benefit from the change.

**Important:** The link to the original report breaks if you rename the custom or original report.

Tasks Performed on Original Reports

This table describes what happens when you use the original report and a corresponding custom report exists.

<table>
<thead>
<tr>
<th>Task Performed on the Original Report</th>
<th>Result When There's a Custom Report</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Opens the custom report.</td>
</tr>
<tr>
<td>Schedule</td>
<td>Creates a report submission for the custom report.</td>
</tr>
<tr>
<td>Edit</td>
<td>Edits the custom report.</td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the original report only. If you delete the custom report, the original report is not deleted.</td>
</tr>
<tr>
<td>Copy</td>
<td>Copies the original report.</td>
</tr>
<tr>
<td>Cut and Paste</td>
<td>Cuts and pastes the original report.</td>
</tr>
<tr>
<td>Rename</td>
<td>Renames the original report. The custom report name is not changed.</td>
</tr>
</tbody>
</table>

**Caution:** This breaks the link between the original and custom reports.
### Layouts

#### Creating and Editing Report Layouts: Overview

The layout determines what and how data is displayed on report output. Each report has at least one layout template. This topic describes the following aspects of report templates:

- Layout templates
- Layout template types
- Overall process of managing layouts
- Deleting layout templates

#### Layout Templates

To customize a layout, you edit the layout template, which:

- Defines the presentation components, such as tables and labeled fields.
- Maps columns from the data model to these components so that the data is displayed in the right place.
- Defines font sizes, styles, borders, shading, and other formatting, including images such as a company logo.

#### Layout Template Types

There are a few types of template files to support different report layout requirements.

- **RTF**: Rich text format (RTF) templates created using Microsoft Word.
- **XPT**: Created using the application's layout editor, these templates are for interactive and more visually appealing layouts.
- **eText**: These templates are specifically for Electronic Data Interchange (EDI) and electronic funds transfer (EFT) information.

You can also create and edit other types of templates using Adobe PDF, Microsoft Excel, Adobe Flash, and XSL-FO.
Overall Process to Create or Edit Layouts

Editing or creating report layout, for example using Microsoft Word or the layout editor, involves making the actual changes to the template file. But that task is just one part of the entire process for customizing layouts.

1. Copy the original report and save the custom version in Shared Folders - Custom in the business intelligence (BI) catalog. You create or edit templates for the custom copy of the report.

   Tip: You can use the Customize option if the original is a predefined report.

2. Review report settings for online viewing.
3. Generate sample data for the report.
4. Edit or create the layout template file.
5. Upload the template file to the report definition. Skip this step if you’re using the layout editor.
6. Configure the layout settings.

Deleting Layout Templates

To remove a layout template for a report:

1. Select your report in the BI catalog and click Edit.
2. In the report editor, click View a list.
3. Select the layout template and click Delete.

Making Reports Available for Online Viewing: Procedure

Some reports are set up so that you can only view them through another application or submit them as scheduled processes. To view your report online while you’re editing it, you must define a few settings. When you’re done editing your report, make sure that you reset these settings as needed.

Updating Report Properties

1. Select your report in the business intelligence catalog and click Edit.
2. In the report editor, click Properties at the top of the page.

Updating Layout Settings

1. Back in the report editor, click View a list.
2. Make sure that the View Online check box is selected.

Generating Sample Report Data: Procedure

Depending on the type of report layout changes you’re making, sample data can be required or optional. You generate sample data, and then load it for use with your layout so that you can map data fields to layout components. For example, for the Start Date table column in your layout, you can set it so that the data displayed in that column comes from the Start Date field in the sample data.
You can generate sample data from the:

- Report data model
- Report viewer
- Scheduler

Generating Sample Data from the Data Model

Follow these steps:

1. Select your data model in the business intelligence (BI) catalog and click **Edit**.

   **Tip:** If you're not sure which data model is the source for your report, find the report in the catalog and click **Edit**. The data model is displayed in the upper left corner of the report editor.

2. In the data model editor, click **View Data**.

3. Enter values for any required parameters, select the number of rows to return, and click **View**.

4. To save the sample data to the data model, click **Save As Sample Data**.

   If you’re designing an RTF template, click **Export** to save the file locally.

5. Save the data model.

Saving Sample Data from the Report Viewer

For reports that are enabled for online viewing, you can save sample data from the report viewer:

1. Select the report in the BI catalog.

2. Click **Open** to run the report in the report viewer with the default parameters.

3. On the Actions menu, click **Export**, then click **Data**.

4. Save the data file.

Saving Sample Data from the Scheduler

For reports that are enabled for scheduling (not necessarily as a scheduled process), you can save sample data from the scheduler:

1. Select the report in the BI catalog.

2. Click **Schedule**.

3. On the General tab, enter values for any report parameters.

4. On the Output tab, ensure that **Save Data for Republishing** is selected.

5. Click **Submit**.


7. On the global header, click **Open**, then click **Report Job History**.

8. Select your report job name in the Job Histories table.

9. On the details page, under Output and Delivery, click the **XML Data Download** icon button.

Layout Templates

Creating and Editing Report Layout Templates Using the Layout Editor: Procedure

The layout editor in the application provides an intuitive, drag-and-drop interface for creating pixel-perfect reports with PDF, RTF, Excel, PowerPoint, and HTML output. The layout template files you create with this tool have an `.xpt` extension. The
layout editor tool is the only editing tool that provides dynamic HTML output. Users can interact with this output in a browser, for example by sorting, applying filters, and so on.

Prerequisite
Make sure that sample data is generated from the data model that your report is using.

Using the Layout Editor
To customize XPT templates:

1. Select the report in the business intelligence (BI) catalog and click **Edit**.
2. In the report editor, click **Edit** to update a template.
   - Or, click **Add New Layout** and select a template type under the Create Layout section.
3. Create or edit the layout.
4. Click **Save** to save the layout to the report definition.

Setting Up for RTF and Excel Report Layout Templates: Procedure
You can use Microsoft Word or Microsoft Excel to create or edit RTF and Excel layout templates, in addition to the layout editor in the application. If you use Word or Excel directly, you must download and install the appropriate add-in so that the Microsoft application has the features you need to design report layouts.

> **Note:** If you’re designing a new layout for your report, consider using the layout editor instead unless you are an experienced layout designer.

Installing the Add-In

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click the **Browse Catalog** button.
3. Click **Home**.
4. Under the Get Started pane, click **Download BI Desktop Tools**.
5. Select the add-in for the type of template you’re working with.
   - **Template Builder for Word**: RTF templates
   - **Analyzer for Excel**: Excel templates
6. Save and then run the installer.

Creating and Editing RTF Report Layout Templates: Procedure
An RTF template is a rich text format file that contains the layout instructions to use when generating the report output. Use Microsoft Word with the Template Builder for Word add-in to design RTF templates.

Prerequisites
Install the Template Builder for Word add-in, and generate sample data.

Using Template Builder for Word
To customize an RTF template:

1. If you are editing an existing layout:
   - a. Select your report in the business intelligence catalog and click **Edit**.
   - b. In the report editor, click the **Edit** link of the layout to download the RTF file.
If you are creating a new layout, skip this step.

2. Open the downloaded RTF template file in Microsoft Word. Or, if you’re creating a new template, just open Microsoft Word.

3. Load the sample data that you generated.

4. Edit or create the layout template.

5. Save the file as Rich Text Format (RTF).

eText Report Layout Templates: Explained

An eText template is an RTF-based report template that is used for Electronic Funds Transfer (EFT) and Electronic Data Interchange (EDI). The template is applied to an input XML data file to create a flat text file that you transmit to a bank or other organizations. Use Microsoft Word to create or edit eText templates.

File Format

Because the output is for electronic communication, not printing, you must follow specific format instructions for exact placement of data on the template. You design eText templates using tables.

- Each record is represented by a table.
- Each row in a table corresponds to a field in a record.
- The columns of the table specify the position, length, and value of the field.

Special Commands

You might need to set up special handling of the data from the input XML file. This table describes the two levels of handling and where you declare the corresponding commands.

<table>
<thead>
<tr>
<th>Level</th>
<th>Example</th>
<th>Setup</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global</td>
<td>Character replacement</td>
<td>Declare global commands in separate setup</td>
</tr>
<tr>
<td></td>
<td>Sequencing</td>
<td>tables.</td>
</tr>
<tr>
<td>Record</td>
<td>Sorting</td>
<td>Declare functions in command rows, in the</td>
</tr>
<tr>
<td></td>
<td></td>
<td>same table as the data.</td>
</tr>
</tbody>
</table>

Uploading the Layout Template File to the Report Definition: Procedure

If you’re creating or editing a report layout using the layout editor, the layout is automatically saved to the report definition, so you can skip this step. For all other layout types, for example RTF, upload the template file to the report definition after you’re done making layout changes.

Uploading the Template File

1. Select your report in the business intelligence catalog and click Edit.
2. In the report editor, click View a list.
3. In the table that lists the layouts, click Create.
4. Under Upload or Generate Layout, click Upload.
5. In the Upload Template File dialog box:
   a. Enter a layout name.
   b. Browse for and select the layout template file that you created or edited.
   c. Select the template file type.
   d. Select the locale, which you can't change once the template file is saved to the report definition.
   e. Click Upload.
6. Save the report definition.

Configuring Layout Settings for Reports: Procedure

As part of creating or editing layout, you can set report properties related to layout. These settings determine, for example, which layouts users can choose from when viewing or scheduling the report. The settings apply only to your report.

Setting Layout Properties

1. Select your report in the business intelligence catalog and click Edit.
2. In the report editor, click View a list.
3. Set layout properties, some of which are described in this table.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output Formats</td>
<td>Depending on the requirements for a report, you may want to limit the output file formats (for example PDF or HTML) that users can choose from. The available output formats vary depending on the template file type.</td>
</tr>
<tr>
<td>Default Format</td>
<td>When multiple output formats are available for the report, the default output format is generated by default when users open the report in the report viewer.</td>
</tr>
<tr>
<td>Default Layout</td>
<td>When multiple layouts are available for the report, you must select a default layout to present it first in the report viewer.</td>
</tr>
<tr>
<td>Active</td>
<td>Active layouts are available for users to choose from when they view or schedule the report.</td>
</tr>
<tr>
<td>View Online</td>
<td>Select this check box so that layouts are available to users when they view the report. Otherwise, the layout is available only for scheduling the report.</td>
</tr>
</tbody>
</table>

4. Click Save Report.

Data Models

Customizing Data Models: Procedure

A data model defines where data for a report comes from and how that data is retrieved. If a data model can't give you all the data that you need in your report, then you can either copy and edit an existing data model or create a new one.
Creating a Data Model

1. In the business intelligence (BI) catalog, click the **New** button and select **Data Model** under **Published Reporting**.
2. Optionally click the **Data Model** node in the Data Model pane to set properties for the data model.
3. Click the **Data Set** node in the Data Model pane to create or edit data sets, which determine where and how to retrieve data.
4. Click the **New Data Set** button and select a data set type. It’s best practice to use the BI repository as a data source, so you should select either:
   - **Oracle BI Analysis**: To use columns from a selected analysis.
   - **SQL Query**: To use a Query Builder tool to define what to use from the repository. Select **Oracle BI EE** as the data source.
5. Optionally, to limit the data included in the report output, click the **Parameters** node in the Data Model pane to define variables that users can set when they use the report.

   **Note:** The order of parameters is important if there are job definitions defined for reports that use your data model. If you change the order in the data model, you must also update the job definitions.
6. Optionally, define other components of the data model.
7. Save your data model.

Editing a Data Model

1. To edit a predefined data model:
   a. Find the data model in the BI catalog and click **Copy**.
   b. Paste within **Shared Folders - Custom** in a subfolder that has a folder path similar to the folder that stores the original data model.
   c. For the data model you pasted, click **More**, and select **Edit**.
2. Optionally click the **Data Model** node in the Data Model pane to set properties for the data model.
3. Click the **Data Set** node in the Data Model pane to create or edit data sets.

   Most predefined data models are of type SQL Query, and are set up to get application data from the following tables:
   - **ApplicationDB_FSCM**: Financials, Supply Chain Management, Project Management, Procurement, and Incentive Compensation
   - **ApplicationDB_CRM**: Sales
   - **ApplicationDB_HCM**: Human Capital Management
4. Perform steps 5 through 7 from the preceding Creating a Data Model task, as needed.

**Related Topics**

- Setting Reports Up to Run as Scheduled Processes: Points to Consider
- Data Structure for Analytics: Explained
Creating a New Data Model for an SCM Report: Worked Example

This example shows how to create a data model for an Oracle Business Intelligence Publisher report. In this example, you create a data model using an SQL query to retrieve a list of items.

Creating 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 SQL Query.
4. In the New Data Set - SQL Query window, enter a name for your data model.
5. In the SQL Query field, enter the appropriate query. For example, you can use the following query:

   ```sql
   select item.item_number "Item Num",
   item.inventory_item_id "Item ID",
   org.organization_code "Organization",
   to_char(item.creation_date, 'DD-MON-RRRR HH24:MI:SS') "Created",
   ic.item_class_code "Item Class", item.item_type "Item Type",
   item.current_phase_code "Lifecycle Phase Code",
   item.INVENTORY_ITEM_STATUS_CODE "Item Status", uom.unit_of_measure "Primary UOM",
   Decode(item.approval_status, 'A', 'Approved', 'D', 'Draft', 'N', 'Not submitted for approval', 'R', 'Rejected', 'S', 'Submitted for approval', 'SCH', 'Scheduled') "Approval Status"
   from egp_system_items_b item, inv_org_parameters org,
   egp_item_classes_b ic, inv_units_of_measure uom
   where item.item_number like 'AS%' and
   item.template_item_flag = 'N' and item.organization_id = org.organization_id and item.item_catalog_group_id = ic.item_class_id
   and item.primary_uom_code = uom.uom_code order by item.creation_date desc, item.item_number
   ```
6. Click OK.
7. Click the Structure tab.
8. In the XML Tag Name field for the Item Number, replace the default value with ITEM_NUM, and replace the default value in the Display Name field with Item Number.
9. Repeat the above step for other XML Tag names and Display Names as appropriate.
10. Click the Data tab.
11. On the Data tab, click View.
12. View the report structure and click Save As Sample Data.
13. Click OK.
14. In the upper-right corner, click Save.
15. In the Save As window, select My Folders, and enter SQL Query for Item List Data Model.

New Reports

Creating Custom Reports: Procedure

Create a custom report when the predefined reports don’t provide the data you need. Or, if you want to use a predefined data model, and also want to change other aspects of the report other than layout. Save your custom report to Shared Folders - Custom in the business intelligence catalog.
Creating a Report

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click Create and select Report.
3. Select the data model to use as the data source for your report.
4. Continue with the wizard to create the report layout, or choose to use the layout editor and close the wizard.
5. Define the layout for the report.
6. Click the Properties button in the report editor to set specific formatting, caching, and processing options for your report.

Setting Up Access

You or your administrator can:

- Create a job definition so that users can run your custom report as a scheduled process.
- Set up the report for scheduling in the Reports and Analytics pane.
- Secure general access to your report and its job definition, if any.

Related Topics

- Setting Reports Up to Run as Scheduled Processes: Points to Consider
- Setting Reports Up for Scheduling in the Reports and Analytics Pane: Procedure

Inventory Reports

Min-Max Planning Report: Explained

The Min-Max Planning Report shows demand, supply, and on-hand information for all items compared with planned stocking levels. When you print the Min-Max Planning report, the inventory level for an item, on-hand quantities plus on-order quantities, is considered. You can replenish low quantities by generating requisitions or by initiating movement requests for items below the minimum. You can perform min-max planning at the inventory organization level or at the subinventory level.
### Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane or work area - Shared Folders - Supply Chain Management - Warehouse Operations - Inventory</td>
</tr>
</tbody>
</table>
| Who uses this report?                                              | • Warehouse Manager  
• Inventory Manager                                                                                                                   |
| When do I use this report?                                         | The Warehouse Manager uses this report throughout the planning process to maintain predefined inventory levels for the items and to take a decision to initiate a new purchase requisition or movement request |
| What prompts can I use to narrow the results of this report?       | • Use the following required parameters to filter the results:  
  ○ Organization  
  ○ Sort By  
  ○ Planning Level  
  ○ Item Selection |
FAQ | Answer
---|---
For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options. | 
How do I share this report? | • Add to briefing book  
• Schedule an agent to run the report  
What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

**Related Topics**

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

**Movement Request Pick Slip Report: Explained**

You can use the Movement Request Pick Slip Report to allocate the movement requests and generate the necessary pick slip reports.

Screen capture of the Movement Request Pick Slip Report

**Key Insights**

You can also use the Movement Request Pick Slip Report in a report-only mode to generate the pick slip report for review purposes without actually allocating the material. The Release Approved Lines parameter can be used to control the mode. Picks for the same movement requests are grouped into pick slips. The Pick Slip Grouping Rule provides additional grouping criteria.

**Frequently Asked Questions**

The following table lists frequently asked questions about this report.
### FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td><strong>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Inventory</strong></td>
</tr>
</tbody>
</table>
| Who uses this report?         | • Warehouse Manager  
• Inventory Manager                                                                                                                   |
| When do I use this report?    | The Warehouse Manager generates this report after he has manually created a requisition movement request on the Manage Movement Requests page. This report is used to physically move the material based on the specifications provided in the report. |
| What prompts can I use to narrow the results of this report? | • Use the following parameters to filter the results  
  ◦ Organization (Required)  
  ◦ From/To Movement Request  
  ◦ From/To Pick Slip  
  ◦ Source subinventory  
  ◦ Source Locator  
  ◦ Destination subinventory  
  ◦ Destination locator  
  ◦ From/To Required Date  
  ◦ Line Status to Print  
  ◦ Movement Request Type  
  ◦ From/To Sales Order  
  ◦ Carrier  
  ◦ Customer  
  ◦ Release Approved Lines  
  ◦ Pick Slip Grouping Rule  
• For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options |
| How do I share this report?   | • Add to briefing book  
• Schedule an agent to run the report                                                                                                    |
| What tool do I use to edit this report? | • Oracle Business Intelligence Publisher                                                                                              |

### Related Topics

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure
Material Status Where Used Report: Explained

The Material Status Where Used Report provides information on material status usage at the subinventory, locator, lot, and serial number levels.

Screen capture of the Material Status Where Used Report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Inventory</td>
</tr>
</tbody>
</table>
| Who uses this report? | • Warehouse Manager  
                          • Inventory Manager                                                                 |
| When do I use this report? | This report is used by the Warehouse Manager to get a detailed overview of the material statuses assigned to the various business objects such as subinventories and lots. This not only provides an overview of the how the material life cycle progresses in your warehouse from the point it is received to the point it is shipped, but also updates you on any exceptions such as a defect. |
FAQ | Answer
--- | ---
What prompts can I use to narrow the results of this report? | Use the following parameters to filter the results:
- Organization (Required)
- From Material Status (Required)
- To Material Status (Required)
- Search in Subinventories
- Search in Locators
- Search in Lots
- Search in Serial Numbers
- For printing formats, select an appropriate format from the Output tab under the Advanced options.

How do I share this report? | Add to briefing book
Schedule an agent to run the report

What tool do I use to edit this report? | Oracle Business Intelligence Publisher

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Cycle Count Listing Report: Explained
The Cycle Count Listing Report provides information for specific items to cycle count. It displays all the scheduled requests for a specified time period. This report includes both manually and automatically scheduled items.
Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Counts</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>• Warehouse Manager&lt;br&gt;• Inventory Manager</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>• The Warehouse Manager uses this report whenever information is required for specific items to cycle count.&lt;br&gt;• The physical report is also used to record and enter the cycle count entries.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>• Use the following parameters to filter the results: &lt;br&gt;○ Organization (Required)&lt;br&gt;○ Cycle Count (Required)&lt;br&gt;○ Start Date&lt;br&gt;○ End Date&lt;br&gt;○ Subinventory&lt;br&gt;○ Owning Party Site&lt;br&gt;○ Show Only Recount Sequences</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
- Display Serial Numbers
- Display On-hand Quantity
- Display Exported Sequences
  - For printing formats, select an appropriate format from the Output tab under the Advanced options.

How do I share this report?
- Add to briefing book
- Schedule an agent to run the report

What tool do I use to edit this report?
- Oracle Business Intelligence Publisher

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Physical Inventory Missing Tag Listing Report: Explained

The Physical Inventory Missing Tag Listing Report provides a list of missing physical inventory tags by identifying the ones that have not been counted.

Screen capture of the Physical Inventory Missing Tag Listing Report

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ | Answer
--- | ---
How do I find this report? | Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Counts
Who uses this report?
- Warehouse Manager
- Inventory Manager
When do I use this report?
If a tag was missed during the physical counts, that omission creates an adjustment to inventory quantities. Use this report to verify that you have no missing tags before proceeding with these adjustments. Tags may be removed from this list by entering a count or voiding them.
FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>• Use the following parameters to filter the results:</td>
</tr>
<tr>
<td></td>
<td>◦ Organization (Required)</td>
</tr>
<tr>
<td></td>
<td>◦ Physical Inventory (Required)</td>
</tr>
<tr>
<td></td>
<td>• For printing formats, select an appropriate format from the Output tab under the Advanced options.</td>
</tr>
<tr>
<td>How do I share this report?</td>
<td>• Add to briefing book</td>
</tr>
<tr>
<td></td>
<td>• Schedule an agent to run the report</td>
</tr>
<tr>
<td>What tool do I use to edit this report?</td>
<td>• Oracle Business Intelligence Publisher</td>
</tr>
</tbody>
</table>

Related Topics

• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

Physical Inventory Tag Listing Report: Explained

The Physical Inventory Tag Listing Report lists all the default and blank tags that you generated and all the dynamic tags that you entered. The report shows the tag number, item, revision, subinventory, locator, lot, and serial number for each tag used in your physical inventory.

Screen capture of the Physical Inventory Tag Listing Report

Frequently Asked Questions

The following table lists frequently asked questions about this report.

FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Counts</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>• Warehouse Manager</td>
</tr>
<tr>
<td></td>
<td>• Inventory Manager</td>
</tr>
</tbody>
</table>
## FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
</table>
| **When do I use this report?** | You can use this report as:  
  - The document you give to the employees performing the counts.  
  - A complete count history after all the counts have been completed. |
| **What prompts can I use to narrow the results of this report?** | Use the following parameters to filter the results:  
  - Organization (Required)  
  - Physical Inventory (Required)  
  - For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options. |
| **How do I share this report?** |  
  - Add to briefing book  
  - Schedule an agent to run the report |
| **What tool do I use to edit this report?** | **Oracle Business Intelligence Publisher** |

## Related Topics

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

## Physical Inventory Tags Report: Explained

The Physical Inventory Tags Report lists all the physical inventory tags generated, and is used to print the physical copies of those tags. For a specified physical inventory, you can print all tags or ranges of tags for a single subinventory or all subinventories.
Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td><strong>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Counts</strong></td>
</tr>
</tbody>
</table>
| Who uses this report?                   | • Warehouse Manager  
• Inventory Manager                                                                                                                    |
| When do I use this report?              | You can use the Physical Inventory Tags report to print physical inventory tags.                                                       |
| What prompts can I use to narrow the    | • Use the following parameters to filter the results:  
  results of this report?                                                                                                             |
|  ◦ Organization (Required)               |   ◦ Physical Inventory (Required)                                                                                                       |
|  ◦ Subinventory                         |   ◦ Sort By (Required)  
   • Tag Number                                                                                                                          |
|  ◦ Sort By (Required)                   |                                                                                                                                       |
FAQ | Answer
---|---
• Subinventory, locator  
• Subinventory, item  
• Item, subinventory, locator  
  ◦ Range (Required)  
    • Full list  
    • Partial list  
  ◦ From Tag  
  ◦ To Tag  
  ◦ From Item  
  ◦ To Item  
• For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options.

How do I share this report?  
• Add to briefing book  
• Schedule an agent to run the report

What tool do I use to edit this report?  
• Oracle Business Intelligence Publisher

**Related Topics**
- [Creating Briefing Books: Procedure](#)
- [Scheduling Reports: Procedure](#)

**Pick Slip Report: Explained**

The Pick Slip Report provides information for picks and the corresponding details for pick slips. This report prints all picking line details in a picking batch.
Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Pick Slips</td>
</tr>
</tbody>
</table>
| Who uses this report?                                                | • Warehouse Manager  
                        • Shipping Manager  
                        • Shipping Agent |
| When do I use this report?                                           | Use this report to pick items for shipment in the warehouse.           |
| What prompts can I use to narrow the results of this report?         | • Use the following parameters to filter the results:  
                        ○ Ship-from Organization  
                        ○ From Pick Slip  
                        ○ To Pick Slip |
<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>◦ Shipping Method</td>
<td>• From Sales Order</td>
</tr>
<tr>
<td>◦ From Sales Order</td>
<td>• To Sales Order</td>
</tr>
<tr>
<td>◦ To Sales Order</td>
<td>• From Movement Request</td>
</tr>
<tr>
<td>◦ From Movement Request</td>
<td>• To Movement Request</td>
</tr>
<tr>
<td>◦ To Movement Request</td>
<td>• Customer</td>
</tr>
<tr>
<td>◦ Customer</td>
<td>• Line Status to Print (Required)</td>
</tr>
<tr>
<td>◦ Line Status to Print (Required)</td>
<td>• All</td>
</tr>
<tr>
<td>◦ Line Status to Print (Required)</td>
<td>• Released to warehouse</td>
</tr>
<tr>
<td>◦ Line Status to Print (Required)</td>
<td>• Staged</td>
</tr>
<tr>
<td>◦ Item Display (Required)</td>
<td>• Both</td>
</tr>
<tr>
<td>◦ Item Display (Required)</td>
<td>• Description</td>
</tr>
<tr>
<td>◦ Item Display (Required)</td>
<td>• Item</td>
</tr>
<tr>
<td>◦ For printing formats, select an appropriate format from the Output tab under the Advanced options.</td>
<td></td>
</tr>
</tbody>
</table>

How do I share this report?  
• Add to briefing book  
• Schedule an agent to run the report

What tool do I use to edit this report?  
• Oracle Business Intelligence Publisher

**Related Topics**

- Creating Briefing Books: Procedure  
- Scheduling Reports: Procedure

**Consumption Advice Report: Explained**

The Consumption Advice Report is used to communicate to the supplier-consigned inventory consumption transactions that occurred within a given period of time. The Consumption Advice Report can be generated on a daily, weekly or monthly frequency. The Consumption Advice Report also serves as the document initiates financial settlement for the consumed inventory.
Key Insights

The Consumption Advice Report can be generated on a daily, weekly or monthly frequency. The Consumption Advice Report can also be generated at various summary levels. The consumption advice frequency and consumption advice summary level are specified in the consignment terms on purchase agreement in Oracle Fusion Purchasing.

Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Inventory</td>
</tr>
</tbody>
</table>
| Who uses this report?                    | • Warehouse Manager  
                                           • Inventory Manager                                                   |
| When do I use this report?               | Use this report to communicate to the supplier the consigned inventory consumption transactions that occurred within a given period of time. The report can be generated on a daily, weekly or monthly frequency. |
| What prompts can I use to narrow the results of this report? | • Use the following parameters to filter the results:  
  ○ Consumption Advice  
  ○ Supplier  
  ○ Supplier Site  
  ○ From Creation Date |
FAQ | Answer
--- | ---
- To Creation Date
- Display Lots and Serial Numbers
- Revision
- Display Unprinted Consumption Advises
- For printing formats, select an appropriate format from the Output tab under the Advanced options.

How do I share this report? | • Add to briefing book
• Schedule an agent to run the report

What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Shipping Reports

Bill of Lading Report: Explained

The Bill of Lading Report prints all sales orders that have been confirmed from a selected delivery. It provides a list of all sales orders shipped on shipments including transportation details.
Screen capture of the Bill of Lading Report.

Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Shipments</td>
</tr>
</tbody>
</table>
| Who uses this report?                  | • Warehouse Manager  
                                      • Shipping Manager  
                                      • Shipping Agent |
| When do I use this report?             | Use this report to list all items in a shipment destined for a particular ship to location. |
| What prompts can I use to narrow the   | • Use the following parameters to filter the results:  
                                      • From / to Initial Ship Date  
                                      • Shipping Method  
                                      • Shipment (Required)  
                                      • Item Display (Required)  
                                      • Both  
                                      • Description |
| results of this report?                |                                                                 |
FAQ | Answer
--|--
• Item
  ◦ Ship-from Organization
• For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options.

How do I share this report?
• Add to briefing book
• Schedule an agent to run the report

What tool do I use to edit this report?
• Oracle Business Intelligence Publisher

**Related Topics**
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

**Commercial Invoice Report: Explained**
The Commercial Invoice report lists all sales orders shipped on shipments, including customs details.

Screen capture of the Commercial Invoice Report

**Commercial Invoice**

**Report Date**: 1/23/15 11:24 AM

<table>
<thead>
<tr>
<th>Commercial Invoice</th>
<th>Report Date 1/23/15 11:24 AM</th>
<th>Page 1 of 1</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Commercial Invoice</th>
<th>75</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Ship From</strong></td>
<td>Chicago</td>
</tr>
<tr>
<td>233 South Wacker Drive</td>
<td></td>
</tr>
<tr>
<td>60606</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td></td>
</tr>
<tr>
<td><strong>Ship To</strong></td>
<td>ABC Application Software</td>
</tr>
<tr>
<td>292 Brickell Rd</td>
<td></td>
</tr>
<tr>
<td>Santa Clara, California 95050</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td></td>
</tr>
<tr>
<td><strong>Ship Date</strong></td>
<td>23-12-2013</td>
</tr>
<tr>
<td><strong>Carrier</strong></td>
<td>DHL Next day air-Air</td>
</tr>
<tr>
<td><strong>Tax ID Number or EIN (if Applicable)</strong></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Item</th>
<th>UOM</th>
<th>Customer Purchase Order</th>
<th>Sales Order</th>
<th>Ship-to Contact</th>
<th>Unit Value</th>
<th>Extended Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>Computer Servers</td>
<td>A09040</td>
<td>12u</td>
<td>200123042</td>
<td>Silvia Danzig</td>
<td>$10,096.00</td>
<td>$50,340.00</td>
</tr>
</tbody>
</table>

**Total** $50,340.00

<table>
<thead>
<tr>
<th>Packing Units</th>
<th>Total Weight</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td>600 lb</td>
<td>$50,340.00</td>
</tr>
</tbody>
</table>

These commodities were exported from the United States in accordance with the Export Administration regulations. Diversion contrary to US law is prohibited.

I declare that all information contained in this invoice is true and correct.

**Signature of Shipper/Exporter**

**Date**

ORACLE
Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td><strong>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Shipments</strong></td>
</tr>
</tbody>
</table>
| Who uses this report?                                                | • Warehouse Manager  
• Shipping Manager  
• Shipping Agent |
| When do I use this report?                                           | Use this report to accompany cross-border shipments.                   |
| What prompts can I use to narrow the results of this report?         | • Use the following parameters to filter the results:  
  ◦ Ship-from Organization (Required)  
  ◦ Shipping Method  
  ◦ Item Display (Required)  
    ▪ Both  
    ▪ Description  
    ▪ Item  
  ◦ Currency  
  ◦ Shipment  
  ◦ Print Customer Item  
  ◦ From / To Initial Ship Date  
  • For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options. |
| How do I share this report?                                          | • Add to briefing book  
• Schedule an agent to run the report |
| What tool do I use to edit this report?                              | • Oracle Business Intelligence Publisher |

Related Topics
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure
Mailing Label Report: Explained

The Mailing Label report provides a list of ship-to address and contact information for shipments.

Screen capture of the Mailing Label Report

<table>
<thead>
<tr>
<th>Shipment</th>
<th>1586</th>
</tr>
</thead>
<tbody>
<tr>
<td>Packing Unit</td>
<td></td>
</tr>
<tr>
<td>Sales Order</td>
<td>SWM_032814_102</td>
</tr>
<tr>
<td>Customer</td>
<td>Computer Service and Rentals</td>
</tr>
<tr>
<td>Ship To</td>
<td></td>
</tr>
<tr>
<td>1400 Peachtree Rd, NE</td>
<td></td>
</tr>
<tr>
<td>Atlanta, Georgia, 30309</td>
<td></td>
</tr>
<tr>
<td>United States</td>
<td></td>
</tr>
<tr>
<td>Contact</td>
<td></td>
</tr>
<tr>
<td>Carrier</td>
<td>Customer-Today-Store Pickup</td>
</tr>
<tr>
<td>Waybill</td>
<td></td>
</tr>
<tr>
<td>Tracking Number</td>
<td></td>
</tr>
</tbody>
</table>

Frequently Asked Questions

The following table lists frequently asked questions about this report.
## FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td><strong>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Shipment</strong></td>
</tr>
</tbody>
</table>
| Who uses this report?                                                   | • Warehouse Manager  
• Shipping Manager  
• Shipping Agent                                                                 |
| When do I use this report?                                              | Use this report to print labels for shipments                                                  |
| What prompts can I use to narrow the results of this report?            | • Use the following required parameters to filter the results:  
  ◦ Ship-from Organization (Required)  
  ◦ Shipment (Required)  
  ◦ Packing Unit  
  ◦ Shipping Method  
  ◦ From / To Initial Ship Date  
  • For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options. |
| How do I share this report?                                             | • Add to briefing book  
• Schedule an agent to run the report                                                        |
| What tool do I use to edit this report?                                 | • Oracle Business Intelligence Publisher                                                        |

### Related Topics

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure
Packing Slip Report: Explained

The Packing Slip Report provides a list of all sales orders and packing units shipped on shipments.

Screen capture of the Packing Slip Report

Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Shipments</td>
</tr>
</tbody>
</table>
| Who uses this report?                   | • Warehouse Manager  
• Shipping Manager  
• Shipping Agent                                                                                     |
| When do I use this report?              | Use this report to list the contents of goods included in shipments.                                                                     |
| What prompts can I use to narrow the results of this report? | • Use the following parameters to filter the results:  
  ○ Ship-from Organization (Required)                                                                 |
FAQ | Answer
---|---
◦ Shipment
◦ Shipping Method
◦ Print Customer Item
◦ Item Display
  • Both
  • Description
  • Item
◦ Sort By (Required)
  • Customer Item
  • Inventory item
◦ From Planned Delivery Date
◦ To Planned Delivery Date
◦ Display Unshipped Quantities
◦ Packing Slip
◦ Update Packing Slip Status
  • For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options.

**How do I share this report?**
  • Add to briefing book
  • Schedule an agent to run the report

**What tool do I use to edit this report?**
  • Oracle Business Intelligence Publisher

**Related Topics**

• Creating Briefing Books: Procedure

• Scheduling Reports: Procedure

---

**Receiving Reports**

**Receipt Traveler Report: Explained**

The Receipt Traveler report facilitates the receiving, inspection, and delivery of goods that you receive within your organization.
Screen capture of the Receipt Traveler Report

Frequently Asked Questions
The following table lists frequently asked questions about this report.

| FAQ                     | Answer                                                                 
|-------------------------|------------------------------------------------------------------------
| How do I find this report? | Reports and Analytics pane - Shared Folders - Supply Chain Management - Warehouse Operations - Receipts |
| Who uses this report?   | • Warehouse Manager  
                           | • Receiving Agent                                                     |
| When do I use this report? | Use this report after you receive the goods to print receipt travelers and attach these tickets to the goods. Each ticket documents the source order, receipt data, and delivery instructions for an item. |
FAQ | Answer
---|---
What prompts can I use to narrow the results of this report? | • Use the following parameters to filter the results:
  ◦ Deliver-to Location
  ◦ Source Organization (Required)
  ◦ Receipt Source (Required)
    • Supplier
    • Customer
    • Transfer Order
    • Inventory
  ◦ From / To Receipt
  ◦ From / To Item
  ◦ From / To Category
  ◦ Ship-to Location
  • For printing formats, select an appropriate format from the Output tab under the Advanced options.

How do I share this report? | • Add to briefing book
• Schedule an agent to run the report

What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

Supply Chain Localizations Reports

Intrastat Collections Export Report: Explained

The Export Intrastat Collections operation creates a file with all the data necessary to make legal declarations via electronic means. This file is a comma-separated-values file that provides information on attributes that are crucial for Intrastat reporting, such as Commodity, Net Mass, Statistical Value, Mode of Transport, Nature of Transaction Code.

Example of comma-separated-values output of the Intrastat Collections Export Report

\[
\begin{align*}
\text{T,Vision France,,,01-10,,,},\text{2014-03-29,rrr} \\
\text{FR,Front Prov,C101-1,Computer Monitor,44,4,,,602,0,,,DDB,FR,,US,,5000,USD,5000,12100,USD} \\
\text{FR,Front Prov,C101-2,Computer Printer,55,4,,,301,0,,,DDB,FR,,US,,6000,USD,6000,6050,USD}
\end{align*}
\]

Frequently Asked Questions
The following table lists frequently asked questions about this report.
FAQ | Answer
---|---
How do I find this report? | Reports and Analytics pane - Shared Folders - Supply Chain Management - Intrastat Reporting

Who uses this report? | • Tax Accountant
• Tax Administrator
• Tax Manager
• Tax Specialist

When do I use this report? | Use this report to make legal declaration with respect to the Intrastat transactions for reporting to legal authorities. You can use any prescribed third party software to generate the report in the required format or you can directly submit the CSV output to the authorities.

What prompts can I use to narrow the results of this report? | • Use the following parameters to filter the results:
  ○ Legal Entity (Required)
  ○ Legal Reporting Unit (Required)
  ○ Period (Required)
  ○ Flow Type
• For printing formats, select an appropriate format from the Output tab under the Advanced options.

How do I share this report? | • Add to briefing book
• Schedule an agent to run the report

What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

Intrastat Collections Details Report: Explained

The Print Intrastat Collections Details operation provides comprehensive information for each Intrastat transaction record. Intrastat records are printed for each item along with transaction date for given legal entity, legal reporting unit and period. This report provides information on attributes that are crucial for detailed reporting, such as Item, Transaction Date, Net Mass, Statistical Value, Mode of Transport, and Nature of Transaction Code.
Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Intrastat Reporting</td>
</tr>
</tbody>
</table>
| Who uses this report?                         | • Tax Accountant  
• Tax Administrator  
• Tax Manager  
• Tax Specialist |
| When do I use this report?                    | Use this report to get a detailed view of Intrastat transactions. You can print this report in draft mode or in final mode. When printed in final mode, the status of the transactions is updated and no further modifications are allowed for those transactions. |
| What prompts can I use to narrow the results of this report? | • Use the following parameters to filter the results:  
  ○ Legal Entity (Required)  
  ○ Legal Reporting Unit (Required)  
  ○ Period (Required)  
  ○ From / To Date  
  ○ Flow Type  
  ○ Source Transaction  
  ○ Report Mode  
  Either a Period or a date range (From Date, To Date) is required. |
FAQ | Answer
--- | ---
• For printing formats, select an appropriate format from the **Output** tab under the **Advanced** options.

How do I share this report? | • Add to briefing book  
• Schedule an agent to run the report

What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

**Related Topics**
• Creating Briefing Books: Procedure  
• Scheduling Reports: Procedure

**Intrastat Collections Report: Explained**

The Print Intrastat Collections operation provides summarized Intrastat collection data based on selected criteria. This report provides information on attributes such as Net Mass, Statistical Value, Mode of Transport, and Nature of Transaction Code.

Screen capture of the Intrastat Collections Report

**Frequently Asked Questions**

The following table lists frequently asked questions about this report.

FAQ | Answer
--- | ---
How do I find this report? | **Reports and Analytics pane - Shared Folders - Supply Chain Management - Intrastat Reporting**

Who uses this report? | • Tax Accountant  
• Tax Administrator
FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>When do I use this report?</td>
<td>Use this report to get a summary of Intrastat transactions. You can print this report in draft mode or in final mode. When printed in final mode the status of the transactions is updated and no further modifications are allowed for those transactions.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>Use the following parameters to filter the results:</td>
</tr>
<tr>
<td></td>
<td>- Legal Entity (Required)</td>
</tr>
<tr>
<td></td>
<td>- Legal Reporting Unit (Required)</td>
</tr>
<tr>
<td></td>
<td>- Period</td>
</tr>
<tr>
<td></td>
<td>- From / To Date</td>
</tr>
<tr>
<td></td>
<td>- Flow Type</td>
</tr>
<tr>
<td></td>
<td>- Arrival</td>
</tr>
<tr>
<td></td>
<td>- Arrival adjustment</td>
</tr>
<tr>
<td></td>
<td>- Dispatch</td>
</tr>
<tr>
<td></td>
<td>- Dispatch Adjustment</td>
</tr>
<tr>
<td></td>
<td>- Source Transaction</td>
</tr>
<tr>
<td></td>
<td>- Report Mode</td>
</tr>
<tr>
<td></td>
<td>Either a Period or a date range (From Date , To Date) is required.</td>
</tr>
<tr>
<td></td>
<td>For printing formats, select an appropriate format from the Output tab under the Advanced options.</td>
</tr>
<tr>
<td>How do I share this report?</td>
<td>- Add to briefing book</td>
</tr>
<tr>
<td></td>
<td>- Schedule an agent to run the report</td>
</tr>
<tr>
<td>What tool do I use to edit this report?</td>
<td>- Oracle Business Intelligence Publisher</td>
</tr>
</tbody>
</table>

Related Topics

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Intrastat Collection Validation Report: Explained

The Intrastat Collection Validation Report provides a list of all validation errors in Intrastat transactions.
Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane - Shared Folders - Supply Chain Management - Intrastat Reporting</td>
</tr>
</tbody>
</table>
| Who uses this report? | • Tax Accountant  
• Tax Administrator  
• Tax Manager  
• Tax Specialist |
| When do I use this report? | Use this report to identify all records that could not be validated, and provide the reason for failure during validation. This is an intended as an internal report, and is not used for any kind of legal reporting. |
| What prompts can I use to narrow the results of this report? | • Use the following parameters to filter the results:  
  ◦ Legal Entity (Required)  
  ◦ Legal Reporting Unit (Required)  
  ◦ Period  
  ◦ From / To Date  
  ◦ Flow Type  
    • Arrival  
    • Arrival adjustment  
    • Dispatch  
    • Dispatch Adjustment  
  ◦ Source Transaction |
FAQ | Answer
--- | ---
Report Mode | Either a Period or a date range (From Date, To Date) is required. For printing formats, select an appropriate format from the Output tab under the Advanced options.

How do I share this report? | • Add to briefing book
• Schedule an agent to run the report

What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

**Related Topics**
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

**Cost Accounting Reports**
Costing Account Balances Report: Explained

The Costing Account Balances Report provides information for reviewing and reconciling account balances.

Screen capture of the Costing Account Balances Report

### Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane or work area - Shared Reports and Analytics - Costing Balances Report</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>This report is typically used at period end for reviewing balances and reconciliations.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>The account balances can be obtained for:</td>
</tr>
<tr>
<td></td>
<td>• Cost Organization</td>
</tr>
<tr>
<td></td>
<td>• Cost Book</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
• Account Type | 
• Time Period | 
• Item plus Item Category | 
How do I share this report? | • Schedule an agent to run the report
What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

COGS and Revenue Matching Report: Explained
The COGS and Revenue Matching Report provides information for reviewing and reconciling recognized and unrecognized revenue and cost of goods sold (COGS).
Screen capture of the COGS and Revenue Matching Report

Cost of Goods Sold Recognition Report

<table>
<thead>
<tr>
<th>Item Category</th>
<th>Item</th>
<th>Revenue Recognized</th>
<th>Revenue Deferred</th>
<th>Revenue Total</th>
<th>Revenue Recognition (%)</th>
<th>Cost of Goods Sold Recognized</th>
<th>Cost of Goods Sold Deferred</th>
<th>Cost of Goods Sold Total</th>
<th>Cost of Goods Sold Recognition (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cases</td>
<td>CMD1503</td>
<td>228,000.00</td>
<td>0.00</td>
<td>228,000.00</td>
<td>100</td>
<td>0.00</td>
<td>25,992,000.00</td>
<td>0.00</td>
<td>25,992,000.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>228,000.00</td>
<td>0.00</td>
<td>228,000.00</td>
<td>100</td>
<td>0.00</td>
<td>25,992,000.00</td>
<td>0.00</td>
<td>25,992,000.00</td>
</tr>
<tr>
<td>Misc. Accessories</td>
<td>CM5437</td>
<td>228,000.00</td>
<td>0.00</td>
<td>228,000.00</td>
<td>100</td>
<td>0.00</td>
<td>77,976,000.00</td>
<td>0.00</td>
<td>77,976,000.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>228,000.00</td>
<td>0.00</td>
<td>228,000.00</td>
<td>100</td>
<td>0.00</td>
<td>77,976,000.00</td>
<td>0.00</td>
<td>77,976,000.00</td>
</tr>
<tr>
<td>Notebook Computers</td>
<td>A54888</td>
<td>1,140,000.00</td>
<td>0.00</td>
<td>1,140,000.00</td>
<td>100</td>
<td>0.00</td>
<td>1,988,311.58</td>
<td>0.00</td>
<td>1,988,311.58</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>1,140,000.00</td>
<td>0.00</td>
<td>1,140,000.00</td>
<td>100</td>
<td>0.00</td>
<td>1,988,311.58</td>
<td>0.00</td>
<td>1,988,311.58</td>
</tr>
<tr>
<td>Packing Material</td>
<td>KB30524</td>
<td>22,800.00</td>
<td>0.00</td>
<td>22,800.00</td>
<td>100</td>
<td>4,678,560.00</td>
<td>0.00</td>
<td>140,356,800.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Total</td>
<td></td>
<td>22,800.00</td>
<td>0.00</td>
<td>22,800.00</td>
<td>100</td>
<td>4,678,560.00</td>
<td>0.00</td>
<td>140,356,800.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>
Key Insights
This report can be used to view just unmatched revenue, or Cost of Goods Sold, to help with period-end reconciliation.

Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane or work area - Shared Reports and Analytics - COGS and Revenue Matching</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>Use this report to ensure that the value of cost of goods sold is synchronized to the amount of recognized revenue in accounts receivable.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>The unmatched COGS and Revenue information can be seen for a Cost Organization-Book combination for Costed or Accounted records. Other options available include date range, Items &amp; Item Category, Customer, Sales Order number. By using different layouts, the data can also be summarized (by Item Category, Item) or can be shown for individual sales orders.</td>
</tr>
<tr>
<td>How do I share this report?</td>
<td>• Schedule an agent to run the report</td>
</tr>
<tr>
<td>What tool do I use to edit this report?</td>
<td>• Oracle Business Intelligence Publisher</td>
</tr>
</tbody>
</table>

Related Topics
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure
Gross Margin Report: Explained

The Gross Margin Report provides information for reviewing product gross margins.

Screen capture of the Gross Margin Report

Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane or work area - Shared Reports and Analytics - Gross Margin Report</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>Use this report to analyze product gross margins.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the</td>
<td>Gross Margin can be analyzed for costed or accounted transactions for</td>
</tr>
<tr>
<td>results of this report?</td>
<td>a specific cost organization and cost book. Other available filters</td>
</tr>
<tr>
<td></td>
<td>include Item Category, Items and Date Range. The data can</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>
FAQ | Answer
---|---
How do I share this report? | • Schedule an agent to run the report
What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

In-Transit Valuation Report: Explained
The In-Transit Valuation Report provides information to review inventory value of items in transit.

In-transit Inventory Valuation Report

<table>
<thead>
<tr>
<th>Cost Organization</th>
<th>ZCST-Vision Ops</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cost Book</td>
<td>ZCST-Vision Ops</td>
</tr>
<tr>
<td>Ledger</td>
<td>Vision Operations (USA)</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
<tr>
<td>From Item</td>
<td></td>
</tr>
<tr>
<td>To Item</td>
<td></td>
</tr>
<tr>
<td>From Item Category</td>
<td></td>
</tr>
<tr>
<td>To Item Category</td>
<td></td>
</tr>
<tr>
<td>Sending Organization</td>
<td></td>
</tr>
<tr>
<td>Receiving Organization</td>
<td></td>
</tr>
<tr>
<td>Flow Type</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>1/2015</td>
</tr>
<tr>
<td>Valuation Basis</td>
<td>Cost</td>
</tr>
<tr>
<td>Zero Cost Items</td>
<td>Include</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Inventory Organization</th>
<th>Item Category</th>
<th>Item</th>
<th>Shipment Number</th>
<th>Quantity</th>
<th>Unit of Measure</th>
<th>In-transit Nature</th>
<th>Cost Element</th>
<th>Cost</th>
<th>Value</th>
<th>Extended Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vision Operations</td>
<td>Desk Accessories</td>
<td>CM11000</td>
<td>P0102375</td>
<td>-81.5</td>
<td>Each</td>
<td>ASSET</td>
<td>ZCST-MATERIAL</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ZCST-NR-TAX</td>
<td>0.00</td>
<td>0.00</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>ZCST-TP</td>
<td>21.76</td>
<td>0.00</td>
<td></td>
</tr>
</tbody>
</table>

Frequently Asked Questions
The following table lists frequently asked questions about this report.
FAQ | Answer
--- | ---
How do I find this report? | Reports and Analytics pane or work area - Shared Reports and Analytics - In-Transit Valuation Report
Who uses this report? | Cost Accountant
When do I use this report? | Use this report during period end to review the value of material in-transit.
What prompts can I use to narrow the results of this report? | The in-transit inventory costed or accounted value can be viewed as of a specific date for a cost organization and book combination. Other parameters include Item Category, Items, incoming or outgoing, and source organization. Using the different layouts, you can summarize the data for combinations of Item Category, Item, In-Transit Type, Transfer and Shipment Organization.
How do I share this report? | • Schedule an agent to run the report
What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

Inventory Valuation Report: Explained
The Inventory Valuation Report provides the information needed to review the value of your inventory. You can analyze the value of the assets in your inventory in a variety of ways, and at varying points in time. Use this report to reveal those values as viewed by the cost book or organization, valuation basis or type, and other important criteria.
Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane or work area - Shared Reports and Analytics - Inventory Valuation Report</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>Use this report in period end to reconcile on-hand inventory quantity and value.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>The Inventory Valuation report provides inventory value based on costed or accounted records as of a specific date for a combination of cost organization and cost book. Other filters include Item Category, Item and the ability to exclude zero cost items and items with negative on-hand. Using the different layouts, the inventory value can be reported for a combination including Inventory Organization, Valuation Unit, and Cost Element.</td>
</tr>
<tr>
<td>How do I share this report?</td>
<td>• Schedule an agent to run the report</td>
</tr>
<tr>
<td>What tool do I use to edit this report?</td>
<td>• Oracle Business Intelligence Publisher</td>
</tr>
</tbody>
</table>
Related Topics

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Layer Inventory Valuation Report: Explained

The Layer Inventory Valuation Report provides the information needed to review the value of inventory, as maintained for each delivery.

Screen capture of the Layer Inventory Valuation Report

Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane or work area - Shared Reports and Analytics - Layer Inventory Valuation Report</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>When inventory value has to be reconciled at the level of specific deliveries.</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
What prompts can I use to narrow the results of this report? | The Inventory value report provides inventory value at a delivery level costed or accounted records as of a specific date for a combination of cost organization and cost book. Other filters include Item Category, Item and ability to exclude zero cost items and items with negative on hand.

How do I share this report? | • Schedule an agent to run the report

What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

**Related Topics**
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

**Work in Process Inventory Valuation Report: Explained**

The Work in Process Inventory Valuation Report provides information for reviewing and reconciling Work-in-Process Inventory Value.
Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td><strong>Reports and Analytics pane</strong> or <strong>Cost Accounting work area - Shared Folders - Supply Chain Management - Cost Management - Cost Accounting - WIP Inventory Valuation Report</strong></td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>The WIP Inventory Valuation Report shows the value of the work-in-process, which can be viewed by Item, Work Order etc. The cost accountant will typically view this information at period end to analyze if there are work orders that are completed but not closed. WIP Inventory value visibility is also important since WIP is part of assets of a company's balance sheet.</td>
</tr>
</tbody>
</table>
| What prompts can I use to narrow the results of this report? | Cost Organization Cost Book & Value as of date are mandatory information. Other than these you can use the following prompts:  
- Plant  
- Work Order Type (Standard/Non-Standard/Both)  
- Work Order Subtype (user defined value from manufacturing setups)  
- Valuation Basis - Costed/Accounted  
- From & To Item Category  
- Work Order Scope - Contract Manufacturing, Non-contract manufacturing work orders,  
- Both Order By - Ascending/Descending for WIP value |
| How do I share this report?              | • Schedule an agent to run the report                                                                                                                                                                   |
| What tool do I use to edit this report?  | • Oracle Business Intelligence Publisher                                                                                                                                                               |

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Receipt Accounting Reports
Accrual Clearing Report: Explained

The Accrual Clearing Report provides a list of accrual clearing transactions, for a purchase order and accrual account, that have been automatically or manually cleared.

Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane or work area - Shared Reports and Analytics - Accrual Clearing Report</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>You typically use this report during period end, to review accruals cleared.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>This report can be viewed for a specific business unit and date range. Additional filters include Item Category, Item, Supplier and Supplier Site.</td>
</tr>
<tr>
<td>How do I share this report?</td>
<td>• Schedule an agent to run the report</td>
</tr>
<tr>
<td>What tool do I use to edit this report?</td>
<td>• Oracle Business Intelligence Publisher</td>
</tr>
</tbody>
</table>
Accrual Reconciliation Report: Explained

The Accrual Reconciliation Report provides information for reviewing and reconciling accrual balances. You can manage the balance of accrued supplier liabilities for a business unit.

Screen capture of the Accrual Reconciliation Summary Report

<table>
<thead>
<tr>
<th>Business Unit</th>
<th>Vision Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ledger</td>
<td>Vision Operations (USA)</td>
</tr>
<tr>
<td>Currency</td>
<td>USD</td>
</tr>
<tr>
<td>From Transaction Date</td>
<td>1/2/15</td>
</tr>
<tr>
<td>To Transaction Date</td>
<td>1/2/15</td>
</tr>
<tr>
<td>From Item</td>
<td></td>
</tr>
<tr>
<td>To Item</td>
<td></td>
</tr>
<tr>
<td>From Category</td>
<td></td>
</tr>
<tr>
<td>To Category</td>
<td></td>
</tr>
<tr>
<td>Supplier</td>
<td></td>
</tr>
<tr>
<td>Supplier Site</td>
<td></td>
</tr>
<tr>
<td>Accrual Reason</td>
<td></td>
</tr>
<tr>
<td>Age of Last Transaction</td>
<td></td>
</tr>
</tbody>
</table>

Screen capture of the Accrual Reconciliation Details Report

<table>
<thead>
<tr>
<th>Accrual Account</th>
<th>Receiving</th>
<th>Accounts Payable</th>
<th>Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>01-000-1110-0000-000</td>
<td>40.00</td>
<td>0.00</td>
<td>40.00</td>
</tr>
<tr>
<td>02-110-9110-0000-000</td>
<td>-61,000.00</td>
<td>0.00</td>
<td>-61,000.00</td>
</tr>
<tr>
<td>02-111-1140-0000-000</td>
<td>-2,400.00</td>
<td>0.00</td>
<td>-2,400.00</td>
</tr>
<tr>
<td>Total</td>
<td>-63,365.82</td>
<td>0.00</td>
<td>-63,365.82</td>
</tr>
</tbody>
</table>

Related Topics

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure
Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td><strong>Reports and Analytics pane or work area - Shared Reports and Analytics - Accrual Reconciliation Report</strong></td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>Use this report during period end to review balances in the accrual account.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>The accrual balances in the accrual account can be viewed for a specific business unit and date range. Additional filters include Item, Item Category, Supplier and the ability to view records which are beyond a user defined tolerance. Using the layouts, summarized or detailed records can be viewed.</td>
</tr>
<tr>
<td>How do I share this report?</td>
<td>• Schedule an agent to run the report</td>
</tr>
<tr>
<td>What tool do I use to edit this report?</td>
<td>• Oracle Business Intelligence Publisher</td>
</tr>
</tbody>
</table>

Related Topics
• Creating Briefing Books: Procedure
Uninvoiced Receipt Accrual Report: Explained

The Uninvoiced Receipt Accrual Report provides information for reviewing uninvoiced receipt accruals in a business unit.

Screen capture of the Uninvoiced Receipt Accrual Report

Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Reports and Analytics pane or work area - Shared Reports and Analytics - Uninvoiced Receipt Accrual Report</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Cost Accountant</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>During period end to review the uninvoiced receipt accruals.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>The uninvoiced receipt accruals can be viewed for an accounting period and for a specific business unit. Additional filters include Item, Item Category, Supplier and the ability to view records which are beyond a user defined tolerance. Using the layouts, summarized or detailed records can be viewed.</td>
</tr>
<tr>
<td>How do I share this report?</td>
<td>Schedule an agent to run the report</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

**Related Topics**

• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

**Change Order Listing Report: Explained**

The Change Order Listing Report displays the details for a range of items for one or more change orders. The details include the change order header and line attributes. Changes made for items can also included in the report.
Key Insights

You can select an item range for the selected change orders. You can go one step further to generate the report for only those change orders that have the specified items whose changes are effective within a certain date range. You can choose to include item changes in the report that provide additional details on specific changes.
Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>To generate a report on multiple change orders: \nManage Change Orders - Search and select change orders - Actions - Generate Report - Submit scheduled process</td>
</tr>
<tr>
<td></td>
<td>To generate a report on a single change order: \nManage Change Orders - Search and select a change order - View or edit the change order - Actions - Generate Report - Select Output format - Go</td>
</tr>
</tbody>
</table>

**Restriction:** This report can only be run from the Manage Change Orders page, since it depends on the selection of data there.

| Who uses this report?                      | • Product Data Steward  
• Product Manager                                                                 |
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>When do I use this report?</td>
<td>When the product data steward must evaluate change orders based on certain criteria.</td>
</tr>
</tbody>
</table>
| What prompts can I use to narrow the results of this report? | • Item Range  
• Effective Dates  
• Include Item Changes                                                                 |
| How do I share this report?               | This is an ad hoc report that is generally not shared. To share the output, choose an Output Format that can be downloaded, such as PDF, and shared as an attachment. |
| What tool do I use to edit this report?    | • Oracle Business Intelligence Publisher                                                                                         |

**Related Topics**

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

**Catalog Details Report: Explained**

The Catalog Details Report displays details about a catalog that include the catalog configuration, category hierarchy, category details and assigned items for each category.
Screen capture of the Catalog Details Report

**Key Insights**

This report provides the details of the catalog, which includes name, description, configuration, sharing configuration and data enablement data. The report lists all of the categories in the catalog and their details, and provides the association of the category in the catalog that defines the hierarchy in the catalog. For each category, the items assigned to the category area are listed. For each item, the item class and organization are listed.
Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Manage Catalogs - Search and select catalog - Actions - Publish - Output Format - Go</td>
</tr>
<tr>
<td>Restriction: This report can only be run from the Manage Catalogs page, since it depends on the selection of data there.</td>
<td></td>
</tr>
</tbody>
</table>
| Who uses this report? | • Product Data Steward  
• Product Manager |
| When do I use this report? | Use this report to publish details of a catalog that can be used to provide data to print catalogs or web catalogs. |
| What prompts can I use to narrow the results of this report? | You can select an output template, format, and locale for the report.  
• Template: Catalog Listing (predefined default). A template is a report layout created with Oracle Business Intelligence Publisher.  
• Output Format: HTML (default), PDF, RTF, Excel, PowerPoint, and Data (XML).  
• Locale: based on the server installation. |
| How do I share this report? | This is an ad hoc report that is generally not shared. To share the output, choose an Output Format that can be downloaded, such as PDF, and shared as an attachment. |
| What tool do I use to edit this report? | • Oracle Business Intelligence Publisher |

Related Topics

• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure

Reports for Concepts
Default Proposal Report: Explained

The Default Proposal Report provides the details contained in a product proposal.

Screen capture of the Default Proposal Report.

Proposal: Sentinel UM-9500 Gaming Laptop

<table>
<thead>
<tr>
<th>Currency</th>
<th>USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Status</td>
<td>Draft</td>
</tr>
<tr>
<td>Version</td>
<td>1</td>
</tr>
</tbody>
</table>

**Business Case Overview**
The video game market is expected to grow 12% in 2014 (118B) and 6% in 2015 (125B). Most of this growth is still focused on gaming on laptops with only about 5% market on tablets.

**General Information**

<table>
<thead>
<tr>
<th>Proposal</th>
<th>Sentinel UM-9500 Gaming Laptop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>The purpose of this proposal is to document the need for a new laptop that focuses on gaming and multimedia experience. This laptop will be based on the Sentinel UM-4500 Laptop that has been out for a year. (High Tech)</td>
</tr>
<tr>
<td>Business Objectives</td>
<td>The video game market is expected to grow 12% in 2014 (118B) and 6% in 2015 (125B). Most of this growth is still</td>
</tr>
</tbody>
</table>

**Key Insights**

This report provides key information about the product proposal such as the proposal description, business objectives, anticipated financial performance and product milestones.

**Frequently Asked Questions**

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Concepts work area - Manage Proposals page - Edit a proposal - Actions - Export - PDF or Word</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Product Manager</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>This report provides key information about the product proposal such as the proposal description, business objectives, anticipated financial performance, and product milestones. Product managers may use this report to review and share information about the product proposal.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>The elements of this report can be customized with Oracle Business Intelligence Publisher.</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
How do I share this report? | Select an output format for the report that can be easily shared as a document, such as PDF or RTF.
What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics

- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Default Requirement Report: Explained

The Default Requirement Report provides the list of requirements and their descriptions for a requirements specification.

Screen capture of the Default Requirement Report.

Sentinel UM-9500 Gaming Laptop

1. Lightweight
   - 10% lighter than current model
2. Portable
   - 10% less volume than current model
3. Connectivity anywhere
   - Supports all wireless standards
4. Sharp picture
   - 3.1 million pixels
5. High performance
   - Twice the speed of current model & 64-bit architecture
6. Long battery life
   - 9 hours
7. Efficient Multimedia Multitasking
   - All industry standard movie and music formats

Key Insights

Products under development must adhere to a set of requirements. This report lists the current requirement headings for a product, and the details for each requirement.
Frequently Asked Questions
The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Concepts work area - Manage Requirements Specifications page - Edit a requirements specification - Actions - Export - HTML, PDF, Word, or XML</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Product Manager</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>This report is used by Product Managers to review and share information about requirements within a specific requirements specification.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this report?</td>
<td>The elements of this report can be customized with Oracle Business Intelligence Publisher.</td>
</tr>
<tr>
<td>How do I share this report?</td>
<td>Select an output format for the report that can be easily shared as a document, such as PDF or RTF.</td>
</tr>
<tr>
<td>What tool do I use to edit this report?</td>
<td>Oracle Business Intelligence Publisher</td>
</tr>
</tbody>
</table>

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Analyses for Portfolios

Value and Consumption Analysis: Explained
The Value and Consumption Analysis provides two charts that help users to understand the value vs cost of various product proposals in a selected scenario.
Screen capture of the Value and Consumption Analysis.

Key Insights
The two chart set helps Portfolio Managers to make decisions by providing a value versus cost view of each of the product proposals in the selected scenario. You can chose various types of values (such as net present value or expected commercial value) and plot them against consumption metrics such as projected cost or projected resources.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Select a Portfolio - Analysis region - Value tab - Value and Consumption Analysis analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need a value versus cost view of each of the product proposals in the selected scenario.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Select a type of Value and type of Consumption to change the analysis.</td>
</tr>
</tbody>
</table>
FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I share this analysis?</td>
<td>Not applicable for this analysis, since its content depends on the data derived from its context, which is not available elsewhere.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Subject Area

This report uses the Innovation Management - Product Portfolio Real Time subject area. For more information, refer to Subject Area documentation on the Oracle Help Center.

Related Topics

- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Revenue, Cost, and Margin Analysis: Explained

The Value: Revenue, Cost, and Margin analysis displays a revenue cost and margin chart for the selected proposals in a scenario.
Screen capture of the Revenue, Cost, and Margin Analysis.

Key Insights
This analysis provides the projected and actual cost, margin and revenue for the selected scenario, over time.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolio work area - Manage Product Portfolios page - Edit a portfolio - Select a scenario - Analysis region - Value tab - Revenue, Cost and Margin analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must analyze the impact of selecting a scenario on the top and bottom lines (that is, cost, revenue, and margins).</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Select a type of Proposal with a range of From and To dates to change the analysis.</td>
</tr>
</tbody>
</table>
FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I share this analysis?</td>
<td>Not applicable for this analysis, since its content depends on the data derived from its context, which is not available elsewhere.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Subject Area

This analysis uses the Innovation Management- Portfolio Cost Real Time and Innovation Management- Portfolio Revenue Real Time subject areas. For more information, refer to Subject Area documentation on the Oracle Help Center.

Related Topics

- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Technical Risk vs. Reward vs. Resources Analysis: Explained

The Balance tab of a Portfolio details page provides the risk vs reward perspective from the technical and market standpoints. The Technical Risk, Reward, and Resources analysis shows each of the product proposals in a 2x2 matrix, helping identify the relative risk.

Screen capture of the Technical Risk vs. Reward vs. Resources Analysis

*Bubble size reflects Resource Headcount value.*
Key Insights
This analysis helps Portfolio Managers to identify the product proposals in the selected scenario with highest reward (Net Present Value) at the lowest technical risk. The size of the bubbles in the display represents the Resources used.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
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</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Select a scenario - Analysis region - Balance tab - Technical Risk, Reward, and Resources analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must identify product proposals in the selected scenario the highest technical risk.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Not applicable for this analysis, since its content is derived from the data available in its context.</td>
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<tr>
<td>How do I share this analysis?</td>
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</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Subject Area
This analysis uses the Innovation Management - Scenario Lifecycle Real Time subject area. For more information, refer to Subject Area documentation on the Oracle Help Center.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Market Risk vs. Return vs. Cost Analysis: Explained
The Balance tab of a Portfolio details page provides the risk vs reward perspective from the technical and market standpoints. The Market Risk vs. Return vs. Cost Analysis places each of the product proposals in a scenario into a 2 X 2 matrix, helping to identify the relative Market risk.
Key Insights

This analysis helps Portfolio Managers to identify product proposals in the selected scenario with the highest reward (3 year revenue) at the lowest business risk. The size of the bubbles in the analysis represents the costs.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Select a scenario - Analysis region - Balance tab - Market Risk, Return, and Cost analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must identify product proposals with the highest risk in a selected scenario.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Not applicable for this analysis, since its content is derived from the data available in its context.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>Not applicable for this analysis, since its content depends on the data derived from its context, which is not available elsewhere.</td>
</tr>
</tbody>
</table>
FAQ

What tool do I use to edit this analysis?

Not applicable for this analysis, since it’s not necessary to modify it.

Related Subject Area

This analysis uses the Innovation Management - Scenario Lifecycle Real Time subject area. For more information, refer to Subject Area documentation on the Oracle Help Center.

Related Topics

• Creating Briefing Books: Procedure

• Scheduling Analytics and Briefing Books: Procedure

Strategic Fit Analysis: Explained

The Strategic Fit Analysis displays the strategic fit for the selected proposals in a scenario.

Screen capture of the Strategic Fit Analysis.

Key Insights

This analysis helps identify the best-fit product proposals in the scenario, based on strategic objectives such as alignment, impact, supply chain fit, R&D know-how and competitive advantage.
Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Select a scenario - Analysis region - Strategy tab - Strategic Fit analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must identify the best-fit product proposals in a scenario.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Not applicable for this analysis, since its content is derived from the data available in its context.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>Not applicable for this analysis, since its content depends on the data derived from its context, which is not available elsewhere.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Subject Area
This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Subject Area documentation on the Oracle Help Center.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure
Product Positioning Analysis: Explained

The Product Positioning Analysis displays product positioning for the selected proposals in a scenario.

Screen capture of the Product Positioning Analysis.

Key Insights
This chart helps you make objective decisions by providing the relative positions of various product proposals in a scenario based on market attractiveness and business unit strength.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td><strong>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Select a scenario - Analysis region - Strategy tab - Product Positioning analysis</strong></td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>This analysis helps identify the product proposals in a scenario that are ideal for investment from a market attractiveness standpoint.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the</td>
<td>Not applicable for this analysis, since its content is derived from the data available in its context.</td>
</tr>
<tr>
<td>results of this analysis?</td>
<td></td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
How do I share this analysis? | Not applicable for this analysis, since its content depends on the data derived from its context, which is not available elsewhere.

What tool do I use to edit this analysis? | Not applicable for this analysis, since it’s not necessary to modify it.

Related Subject Area
This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Analyses for Comparing Scenarios

Cost vs. Revenue vs. Resource Headcount Analysis: Explained
The Cost vs. Revenue vs. Resource Headcount Analysis helps compare scenarios by providing a 2 x 2 matrix of cost vs revenue for each of the scenarios.
Key Insights
Across selected scenarios, this analysis helps Portfolio Managers to make decisions by providing a Value vs Cost view of each of the product proposals in the selected scenario.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Navigate to Compare Scenarios - Select scenarios - Analysis region - Value tab - Cost, Revenue, and Resource Headcount analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>This analysis enables you to look at cost vs revenue of each of the scenarios, relative to each other.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Not applicable for this analysis, since its content is derived from the data available in its context.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
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<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it's not necessary to modify it.</td>
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</table>
Related Subject Area
This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Product Maturity Analysis: Explained
When comparing scenarios, the Product Maturity Analysis visualizes the costs or revenues associated with the phases of a product over its lifetime.

Screen capture of the Product Maturity Analysis.

Key Insights
This analysis provides a stacked bar of revenue or cost for each of the scenarios based on the type of the product proposal.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.
FAQ | Answer
---|---
How do I find this analysis? | Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Navigate to Compare Scenarios - Select scenarios - Analysis region - Value tab - Product Maturity analysis
Who uses this analysis? | Product Portfolio Manager
When do I use this analysis? | Use this analysis to determine which scenarios have the best revenue to cost balance between new product development vs. product maintenance.
What prompts can I use to narrow the results of this analysis? | Select a type of Metric to change the analysis.
How do I share this analysis? | Not applicable for this analysis, since its content depends on the data derived from its context, which is not available elsewhere.
What tool do I use to edit this analysis? | Not applicable for this analysis, since it’s not necessary to modify it.

Related Subject Area
This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Revenue, Cost, and Margin Analysis: Explained
The Revenue, Cost, and Margin analysis displays a revenue cost and margin chart for the proposals in a comparison scenario.
Screen capture of the Revenue, Cost, and Margin analysis.

Key Insights
This chart provides comparison of revenue to cost, and margin, across various scenarios

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
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</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Navigate to Compare Scenarios - Select scenarios - Analysis region - Value tab - Revenue, Cost and Margin analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must analyze the benefit of selecting a scenario based on top and bottom lines, that is, the cost, revenue and margins.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Select a range of From and To dates to change the analysis.</td>
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</table>
Related Subject Area

This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics

- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Technical Risk vs. Reward vs. Resources Analysis: Explained

The **Balance** tab of a Compare Scenarios page provides the risk vs reward perspective from the technical and market standpoints. The Technical Risk, Reward, and Resources analysis shows each of the product proposals in a 2x2 matrix, helping identify the relative risk.

Screen capture of the Technical Risk vs. Reward vs. Resources analysis.

* Bubble Size reflects Resources value.
Key Insights
Across selected scenarios, this analysis helps Portfolio Managers to identify the scenario with highest reward (Net Present Value) at the lowest technical risk. The size of the bubbles in the display represents the Resources used.

Frequently Asked Questions
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<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Navigate to Compare Scenarios - Select scenarios - Analysis region - Balance tab - Technical Risk, Reward, and Resources analysis</td>
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<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must identify the scenarios with the highest reward and lowest technical risk.</td>
</tr>
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<td>What prompts can I use to narrow the results of this analysis?</td>
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<tr>
<td>What tool do I use to edit this analysis?</td>
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</tbody>
</table>

Related Subject Area
This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Market Risk vs. Reward vs. Cost Analysis: Explained
The Market Risk vs. Return vs. Cost Analysis compares the selected scenarios based on revenue and market risk. The bubble size is proportional to the cost.
Key Insights
Across selected scenarios, this analysis helps Portfolio Managers to identify product proposals in the selected scenario with the highest reward (3 year revenue) at the lowest business risk. The size of the bubbles in the analysis represents the costs.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

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<thead>
<tr>
<th>FAQ</th>
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</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Navigate to Compare Scenarios - Select scenarios - Analysis region - Balance tab - Market Risk, Return, and Cost analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must identify scenarios with the highest reward and the lowest market risk.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Not applicable for this analysis, since its content is derived from the data available in its context.</td>
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Related Subject Area
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Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Strategic Fit Analysis: Explained
The Strategic Fit Analysis helps compare scenarios based on their strategic fit for the company.

Screen capture of the Strategic Fit Analysis.

Key Insights
Across selected scenarios, this analysis helps identify the best-fit product scenarios, based on strategic objectives such as alignment, impact, supply chain fit, R&D know-how and competitive advantage.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.
FAQ | Answer
--- | ---
How do I find this analysis? | Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Select a scenario - Analysis region - Strategy tab - Strategic Fit analysis

Who uses this analysis? | Product Portfolio Manager

When do I use this analysis? | When you must identify the best-fit product proposals in a scenario.

What prompts can I use to narrow the results of this analysis? | Not applicable for this analysis, since its content is derived from the data available in its context.

How do I share this analysis? | Not applicable for this analysis, since its content depends on the data derived from its context, which is not available elsewhere.

What tool do I use to edit this analysis? | Not applicable for this analysis, since it’s not necessary to modify it.

Related Subject Area
This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Market vs. Strategic Fit Analysis: Explained
The Market vs. Strategic Fit Analysis compares selected scenarios based on strategic alignment vs. 3 year revenue.
Key Insights
This analysis compares various selected scenarios based on strategic alignment vs 3 year revenue.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Navigate to Compare Scenarios - Select scenarios - Analysis region - Strategy tab - Market and Strategic Fit</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>Use this analysis to determine which scenario to select, based on both revenue expectations and strategic alignment.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Not applicable for this analysis, since its content is derived from the data available in its context.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
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<tr>
<td>What tool do I use to edit this analysis?</td>
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Related Subject Area

This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics

- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Allocated Resources Analysis: Explained

When comparing scenarios, the Allocated Resources Analysis provides a resource allocation view of the pools for each of the selected scenarios.

Screen capture of the Allocated Resources Analysis.

Key Insights

Provides insight into the resource pool allocation by scenario, enabling you to identify the pools with the heaviest allocation.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Navigate to Compare Scenarios - Select scenarios - Compare Scenarios region - Resources tab - Resource Allocation analysis</td>
</tr>
<tr>
<td>FAQ</td>
<td>Answer</td>
</tr>
<tr>
<td>-----</td>
<td>--------</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must determine the scenarios that are the best fit, based on their resource pool needs</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Not applicable for this analysis, since its content is derived from the data available in its context.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>Not applicable for this analysis, since its content depends on the data derived from its context, which is not available elsewhere.</td>
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<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
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</tbody>
</table>

Related Subject Area
This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Projected Consumption Analysis: Explained
When comparing scenarios, the Projected Consumption Analysis provides for each resource pool, the resource requirements for each scenario.
Key Insights
Across selected scenarios, provides a view of the aggregate resource pool needs by time bucket

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Portfolios work area - Manage Product Portfolios page - Edit a portfolio - Navigate to</td>
</tr>
<tr>
<td></td>
<td>Compare Scenarios - Select scenarios - Compare Scenarios region - Resources tab -</td>
</tr>
<tr>
<td></td>
<td>Consumption analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Product Portfolio Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you must determine the scenario that’s most optimal based on the allocation for most</td>
</tr>
<tr>
<td></td>
<td>critical resource pools.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Select a type of Resource Pool to change the analysis.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>Not applicable for this analysis, since its content depends on the data derived from its</td>
</tr>
<tr>
<td></td>
<td>context, which is not available elsewhere.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>
Related Subject Area

This analysis uses the Innovation Management- Scenario Lifecycle Real Time subject area. For more information, refer to Oracle Cloud - Subject Area documentation on the Oracle Help Center.

Related Topics

- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Overview Page

Orders on Backorder Analysis: Explained

The Orders on Backorder Analysis shows the number of orders that contain at least one line with a backordered status, for specified ranges of days, using a bar for each range. For example, one range indicates the number of orders that have been in backordered status for 8 to 14 days. You can click a range bar to drill down to the Manage Orders page, which displays a list of orders restricted to the exception type that corresponds to that range, as indicated by an icon in the Exception Type column.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.
<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management work area - Overview page - Orders on Backorder</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager, Order Entry Specialist</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need to determine which orders are backordered, and for how long.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None. The analysis is generated from the underlying fulfillment lines.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context-sensitive to the underlying fulfillment lines and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

**Orders Past Due Analysis: Explained**

The Orders Past Due Analysis shows the number of orders that are past due for specified ranges of days, using a bar for each range. For example, one range indicates the number of orders that have been past due for 8 to 14 days. You can click a range bar to drill down to the Manage Orders page, which displays a list of orders restricted to the exception type that corresponds to that range, as indicated by an icon in the Exception Type column.
Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management work area - Overview page - Orders Past Due</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager, Order Entry Specialist</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need to determine which orders are past due, and for how long.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None. The analysis is generated from the underlying fulfillment lines.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context-sensitive to the underlying fulfillment lines and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Orders on Hold Analysis: Explained

The Orders on Hold Analysis shows the number of orders for which processing has been put on hold for specified reasons, using a bar for each reason. You can click a range bar to drill down to the Manage Orders page, which displays a list of orders restricted to the exception type that corresponds to that range, as indicated by an icon in the Exception Type column. On the Manage Orders page, you can click the On Hold icon for an order for more details about the exception.
Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management work area - Overview page - Orders on Hold</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager, Order Entry Specialist</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need to determine which orders are on hold, and the reasons for the hold.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None. The analysis is generated from the underlying fulfillment lines.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context-sensitive to the underlying fulfillment lines and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it's not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Topics
- Using Holds to Temporarily Stop Processing: Procedure

Orders in Jeopardy Analysis: Explained
The Orders in Jeopardy Analysis shows the number of orders that are in jeopardy, using a bar for each jeopardy priority that you have previously defined. For example, a range can indicate high, medium, or low jeopardy priorities. You can click a range bar to drill down to the Manage Orders page, which displays a list of orders restricted to the exception type that
corresponds to that range, as indicated by an icon in the Exception Type column. If an order contains fulfillment lines that are at different jeopardy priorities, then the order is represented in the level with the highest risk.

<table>
<thead>
<tr>
<th>Orders in Jeopardy</th>
</tr>
</thead>
<tbody>
<tr>
<td>High</td>
</tr>
<tr>
<td>Medium</td>
</tr>
<tr>
<td>Low</td>
</tr>
</tbody>
</table>

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management work area - Overview page - Orders in Jeopardy</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager, Order Entry Specialist</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need to determine which orders are in jeopardy for delay.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None. The analysis is generated from the underlying fulfillment lines.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context-sensitive to the underlying fulfillment lines and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Orders in Error Analysis: Explained

The Orders in Error Analysis shows the number of orders that have been in error status for specified types of processing errors, using a bar for each range. The errors depend on the business rules that you have defined for orchestration processes. You can click a range bar to drill down to the Manage Orders in Error page, which displays a list of orders.
restricted to the exception type that corresponds to that range, as indicated by an icon in the Message Type column. On the Manage Orders in Error page, you can click the icon in the Message Type column for more details about the error.

The following table describes some possible reasons for order errors.

<table>
<thead>
<tr>
<th>Error type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage fulfillment task</td>
<td>There was a failure in the completion of the next step in the fulfillment sequence, such as an error communicating with an external system.</td>
</tr>
<tr>
<td>Assign orchestration process</td>
<td>There was a failure in the assignment of an orchestration process to a fulfillment line.</td>
</tr>
<tr>
<td>Validate processing constraints</td>
<td>The order failed to satisfy a processing rule.</td>
</tr>
<tr>
<td>Manage orchestration process</td>
<td>There was a failure in running an orchestration process. Possible reasons include failure to deploy the process or to make a server available.</td>
</tr>
</tbody>
</table>

**Frequently Asked Questions**

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management work area - Overview page - Orders in Error</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager, Order Entry Specialist</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need to determine which orders are in error, and the reasons for the error.</td>
</tr>
</tbody>
</table>
Fulfillment Lines in Jeopardy Analysis: Explained

The Fulfillment Lines in Jeopardy Analysis shows the number of fulfillment lines that are in jeopardy, using a bar for each jeopardy priority that you have defined. For example, a range can indicate high, medium, or low jeopardy priorities. You can click a range bar to drill down to the Manage Fulfillment Lines page, which displays a list of fulfillment lines restricted to the exception type that corresponds to that range, as indicated by an icon in the Exception Type column.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management work area - Overview page - Fulfillment Lines in Jeopardy</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager, Order Entry Specialist</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
When do I use this analysis? | When you need to determine which fulfillment lines are in jeopardy for delay.

What prompts can I use to narrow the results of this analysis? | None. The analysis is generated from the underlying fulfillment lines.

How do I share this analysis? | This analysis is context-sensitive to the underlying fulfillment lines and is not shareable.

What tool do I use to edit this analysis? | Not applicable for this analysis, since it’s not necessary to modify it.

Manage Fulfillment Line Exceptions Page

Item Availability Analysis: Explained

This analytical view shows the availability of a given item, internally at various warehouses and externally at drop ship suppliers. This analysis is context sensitive. The analytic is based on the selected record in the master table. The context of the analysis changes as you navigate and select a record in the master table.

Key Insights

This analysis shows item availability by warehouse or supplier locations or both. The drop-down list is populated with any alternate items, if the item in the selected fulfillment line has any alternate or substitute items configured in the system. The analysis provides the count of available items at various warehouses or suppliers. You can navigate across multiple
warehouses or suppliers using the horizontal scroll bar at the bottom of the analysis. The supplier capacity must be collected in Global Order Promising to provide a correct analysis based on that capacity and allocations.

The quantities displayed in this analysis are:

- Available quantity: Amount of unallocated inventory available that is used to fill customer orders. It is calculated as the shelf quantity minus the allocated quantity
- Shelf quantity: Amount of inventory that is on the shelf for a given item that is currently in the warehouse or supplier location. It includes both allocated and unallocated quantities.
- Allocated quantity: Amount of inventory that was set aside to fill a customer’s order.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Analytics - Item - View: Item availability</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>This report provides key information about the availability of the item at various warehouses or suppliers. It further clearly displays the item quantity on shelf, allocated, or available. Statuses include system statuses and user defined statuses. The context of the item is directly related to the fulfillment line the user selected record in the master table. If the item in the selected fulfillment line has any substitute item configured, then the analysis shows a drop down list of all substitute items available for the selected fulfillment line. Users can take intelligent decisions based on item availability, substitute items availability, warehouse or supplier location, quantity available, and so on, to resolve any fulfillment exceptions.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>The Source list enables you to specify a source type. This analysis also provides prompts to view any substitute items, but only if any substitute item is configured for the original item.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context sensitive to item associated with the selected fulfillment line and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Topics

- Scheduling Analytics and Briefing Books: Procedure
Count Of Holds For This Item By Hold Name Analysis: Explained

This analytical view shows different hold applied to a given item. This analysis is context-sensitive. The analysis is based on the selected record in the master table. The context of the analysis changes as you navigate and select records in the master table.

Key Insights

This analysis shows holds applied, across all fulfillment lines, to the selected item. The analysis provides the count of various holds sorted by hold name for the selected item from selected fulfillment line. This analysis counts holds applied to the orchestration order, the orchestration order line, and associated fulfillment lines. A specific fulfillment line may have multiple different holds. The output of this analysis is cached, so the data is not displayed in real time. The data is refreshed in accordance with the caching configuration.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Analytics - Item - View: Count of holds for this item by hold name</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need information about various holds applied to all orders for a selected item. The context of the item is directly related to the fulfillment line for the selected record in the master table. If the</td>
</tr>
<tr>
<td>FAQ</td>
<td>Answer</td>
</tr>
<tr>
<td>-------------------------------------------------------------------</td>
<td>------------------------------------------------------------------------</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context sensitive to the item associated with the selected fulfillment line and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

**Open Orders For This Customer By Age Analysis: Explained**

This analysis shows the age of the orders for the selected customer. It shows the count of orders sorted by the selected time period. This analysis is context sensitive. The analysis is based on the selected record in the master table. The context of the analysis changes as you navigate and select a record in the master table.

**Customer**

```
View: Open orchestration orders for this customer by age

Units: Count, Time Interval, Week

<table>
<thead>
<tr>
<th>0</th>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
<th>6</th>
<th>7</th>
<th>8</th>
<th>9</th>
<th>10</th>
<th>11</th>
<th>12</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Open Orders
```
Key Insights

This analysis shows the age of orders for the selected customer.

The age of orchestration orders for a customer is calculated as follows:

- For open orders, age is how long the order has been open, calculated as: \( (\text{age}) = (\text{system date}) - (\text{ordered date}) \)
- For closed orders, age is the difference in how long it took to close the order, calculated as: \( (\text{age}) = (\text{last updated date}) - (\text{ordered date}) \)

The last updated date serves as a proxy for closed date. If an order is future dated, then it is possible to get a negative value. The time axis of the analysis is based on ordered date, meaning, for example, that an order placed in May but closed in June appears on the May graph bar. Negative values are possible.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Analytics - Customer - View: Open orders for this customer by age analysis</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>This report provides a count of orders, sorted by a selected time period for a selected customer. The context of the customer is directly related to the fulfillment line for the selected record in the master table.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Users can view the analysis as a count of orders or value of orders in currency. Further filtering is possible by selecting the time period in days, weeks, months, quarter or years. The numerals on the x-axis refer to the time period selected.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context sensitive to the selected fulfillment line and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Topics

- Scheduling Analytics and Briefing Books: Procedure
Count Of Holds For This Customer By Hold Name Analysis: Explained

This analysis counts the holds applied to the order, order line, and associated fulfillment lines. This analysis is context sensitive in the context of fulfillment line exceptions. The analysis is based on the selected record in the master table. The context of the analysis changes as you navigate and select records in the master table.

Key Insights

A specific order, order line, or related fulfillment line may have multiple different holds. The output of this analysis is cached, so the data is not displayed in real time. The data is refreshed in accordance with the caching configuration.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Analytics - Customer - View: Count of holds for this customer by hold name</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need information to focus your attention on the underlying reason for the most commonly occurring holds for a selected customer. The context of the customer is directly related to the fulfillment line for the selected record in the master table. If the item in the selected fulfillment line has no holds applied, then the analysis states that no results were found.</td>
</tr>
</tbody>
</table>
FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context sensitive to the selected fulfillment line and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Topics

- [Creating Briefing Books: Procedure](#)
- [Scheduling Analytics and Briefing Books: Procedure](#)

Fulfillment Line Exceptions For This Order Analysis: Explained

This analysis shows open fulfillment lines, each of which may have multiple concurrent exception types. This analysis is context sensitive. The analysis is based on the selected record in the master table. The context of the analysis changes as you navigate and select records in the master table.

**Order**

![Bar chart](#)

**Key Insights**

A fulfillment line could be counted more than once. For example, a fulfillment line could be both in jeopardy and on hold. In this analysis, all the exceptions are counted for the order. Therefore, if an orchestration order has two fulfillment lines with two exceptions each, then the report counts four exceptions.
Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Analytics - Order - View: Fulfillment line exceptions for this order</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>This analysis shows open fulfillment lines, each of which may have multiple concurrent exception types. The context of the customer is directly related to the fulfillment line the user selected record in the master table.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context sensitive to the selected fulfillment line and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it's not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Topics
- Scheduling Analytics and Briefing Books: Procedure
Value Of Fulfillment Lines By Hold Name Analysis: Explained

This analysis shows the value in the standardized currency. This analysis is context sensitive. The analysis is based on the selected record in the master table. The context of the analysis changes as you navigate and select a record in the master table.

Key Insights

The standardized currency is the currency that is used in the Order Orchestration work area. It might not be the currency of the original transaction. This analysis does not count the same hold more than once, in the case of inherited holds. For example, a hold code that is applied to an orchestration order is inherited by the associated fulfillment line, but the hold is counted only once in the report.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td><strong>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Analytics</strong>&lt;br&gt;<strong>- Order - View: Value of fulfillment lines by hold name</strong></td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>The context of the customer is directly related to the fulfillment order line the user selected record in the master table.</td>
</tr>
</tbody>
</table>
FAQ

<table>
<thead>
<tr>
<th>What prompts can I use to narrow the results of this analysis?</th>
<th>You can filter the analysis by either customer or item.</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context sensitive to the selected fulfillment line and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

Related Topics

- Scheduling Analytics and Briefing Books: Procedure

**Average Age Of Orders By Hold Analysis: Explained**

This report counts holds that are applied to an orchestration order; it does not count holds that are applied to associated fulfillment lines. This analysis is context sensitive. The analytic is based on the selected record in the master table. The context of the analysis changes as users navigate and selects a record in the master table.

**Key Insights**

This analysis calculates age as follows:

- For open orders, age is how long the order has been open, calculated as: \( \text{age} = \text{system date} - \text{ordered date} \)
- For closed orders, age is the difference in how long it took to close the order, calculated as: \( \text{age} = \text{last updated date} - \text{ordered date} \)
The **last updated date** serves as a proxy for **closed date**. If an order is future dated, then it is possible to get a negative value. The time axis is based on **ordered date**, meaning an order placed in May but closed in June appears on the May graph bar.

### Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td><strong>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Analytics - Order - View: Average age of orders by hold</strong></td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When considering the relative sense of the holds that are causing the most significant delays, so that you can resolve the most time-consuming holds. The context of the customer is directly related to the fulfillment line the user selected record in the master table.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context sensitive to the selected fulfillment line and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

### Related Topics

- Scheduling Analytics and Briefing Books: Procedure

### Manage Orchestration Process Exceptions Page

### Orchestration Process Exceptions By Type Analysis: Explained

The analyses for orchestration process exceptions provide current information about orchestration processes. An orchestration process can have more than one exception. In this analysis, each orchestration process instance is counted.
once for each of the exceptions that applies to it. This analysis is context sensitive. The analysis is based on the selected record in the master table. The context of the analysis changes as you navigate and select a record in the master table.

![Orchestration Processes Chart](image)

### Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Orchestration Process Exceptions - Analytics - Orchestration Processes - View: Orchestration process exceptions by type</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need to know the relative severity of each exception type (such as Past Due, On Hold, or In Jeopardy), with the goal of finding ways to resolve those exceptions.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis is context sensitive to the selected fulfillment line and is not shareable.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>Not applicable for this analysis, since it’s not necessary to modify it.</td>
</tr>
</tbody>
</table>

### Related Topics

- Scheduling Analytics and Briefing Books: Procedure
Count Of Holds For This Customer By Hold Name Analysis: Explained

This analysis counts the holds applied to the order, order line, and associated fulfillment lines. This analysis is context sensitive in the context of orchestration process exceptions. The analysis is based on the selected record in the master table. The context of the analysis changes as you navigate and select records in the master table.

Key Insights

A specific order, order line, or related fulfillment line may have multiple different holds. The output of this analysis is cached, so the data is not displayed in real time. The data is refreshed in accordance with the caching configuration.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Orchestration Process Exceptions - Analytics - Customer - View: Count of holds for this customer by hold name</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you need information about various holds applied to all orders for a selected customer. The context of the customer is directly related to the fulfillment order line for the selected record in the master table. If the item in the selected fulfillment line has no holds applied, then the analysis states that no results were found.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None.</td>
</tr>
</tbody>
</table>
FAQ Answer

How do I share this analysis? This analysis is context sensitive to the selected fulfillment line and is not shareable.

What tool do I use to edit this analysis? Not applicable for this analysis, since it’s not necessary to modify it.

Related Topics

• Creating Briefing Books: Procedure

• Scheduling Analytics and Briefing Books: Procedure

Reports & Analytics Work Area

Past Due Fulfillment Lines Report: Explained

This report provides key information about fulfillment lines that are past due.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

FAQ Answer

How do I find this analysis? Reports and Analytics pane or work area - Shared Folders - Supply Chain Management - Order Orchestration - Transactional Analysis Samples - Past Due Fulfillment Lines

Who uses this analysis? Order Manager

When do I use this analysis? When you must identify fulfillment lines that are past due.
FAQ | Answer
---|---
What prompts can I use to narrow the results of this analysis? | Use the following required parameters to filter the results:  
- Year  
- Inventory Organization Name  
- Item Name  
- Business Unit Name  
- Bill-to Customer Name  
- Ship-to Customer Name  
- For printing formats, select an appropriate format from the Output tab under the Advanced options.

How do I share this analysis? | This analysis is context sensitive to the selected fulfillment line and is not shareable.

What tool do I use to edit this analysis? | Not applicable for this analysis, since it’s not necessary to modify it.

Related Topics
- Creating Briefing Books: Procedure
- Scheduling Analytics and Briefing Books: Procedure

Reports for Global Order Promising

Review Supply Availability Report: Explained

This report shows availability of an item at warehouses. This report queries the in-memory data within the Global Order Promising (GOP) engine and displays the current availability of the item. The GOP engine is a real-time promising engine that is always online, promising orders as they are created. This report generated by GOP is thus only valid at the point of time that it is generated. This report displays the initial supply, consumed quantity, and the net available supply for future orders.

Key Insights

This analytic shows aggregate supply and does not provide visibility to the specific supply type. If you have some On Hand and some Purchase Order supply today, you would only see the consolidated supply number in this report, without visibility to the individual On Hand and Purchase Order quantity.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.
FAQ | Answer
--- | ---
How do I find this analysis? | Order Management - Order Orchestration - Reports and Analytics pane - Review Supply Availability
Who uses this analysis? | Order Manager
When do I use this analysis? | When an order has been promised late, and you want to understand whether this was due to supply not being available, and to also find other warehouses where supply may be available.
What prompts can I use to narrow the results of this analysis? | Use the following required parameters to filter the results:
  - Item
  - Warehouse
  - From Date
  - To Date
How do I share this analysis? | This analysis cannot be shared; it is also not relevant for sharing since the supply report is only valid at the time it is generated. Since orders are promised in real time, the availability numbers in this report may no longer be accurate.
What tool do I use to edit this analysis? | This analysis cannot be edited.

Related Topics
- Scheduling Analytics and Briefing Books: Procedure

Review Supply Allocation Report: Explained

Supply within GOP can be allocated to demand classes through a planning allocation rule. As orders are promised, they consume allocations from their demand class. This report shows the allocated, consumed, and available quantities for a demand class at a point in time.

Key Insights
This report is only relevant for items that are assigned to a planning allocation rule.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

FAQ | Answer
--- | ---
How do I find this analysis? | Order Management - Order Orchestration - Reports and Analytics pane - Review Supply Allocation
Who uses this analysis? | Order Manager
When do I use this analysis? | When an order has been promised late, and you want to understand whether this was due to insufficient supply at a demand class, and to also identify other demand classes where sufficient allocation is available.
### FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Use the following required parameters to filter the results: \newline</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis cannot be shared; it is also not relevant for sharing since the supply report is only valid at the time it is generated. Since orders are promised in real time, the availability numbers in this report may no longer be accurate.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>This analysis cannot be edited.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Scheduling Analytics and Briefing Books: Procedure

### Manage Fulfillment Lines
Item Availability Analysis: Explained

For a selected fulfillment line, this is a contextual analytic that shows the shelf quantity, allocated quantity, and available quantity for the item at warehouses.

Key Insights

The analytic shows only those warehouses that are relevant for the item and customer on the selected fulfillment line. If a warehouse already appears on the line, the analytic displays data only for that warehouse. If a warehouse does not appear on a line, the analytic displays data for warehouses that are specified according to the global sourcing rule associated with the item and customer on the fulfillment line.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

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</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Select a fulfillment line - Analytics - Item - View: Item availability</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
</tbody>
</table>


### FAQ

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to get a quick view into the current availability at a warehouse today.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None. The context is generated automatically based on the line you selected. If an item has substitutes, you can either choose to see the primary item or substitute item availability by selecting this from within the analytic.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis cannot be shared; it is also not relevant for sharing since the supply report is only valid at the time it is generated. Since orders get promised in real-time, the availability numbers in this report may no longer be accurate.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
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</tr>
</tbody>
</table>

### Related Topics
- Scheduling Analytics and Briefing Books: Procedure

### Fulfillment Line Promising Distribution Analysis: Explained

For a selected batch of fulfillment lines that are being checked for availability, this pie chart shows the delay distribution for the selected batch of lines. The **Original** pie chart shows the delay distribution based on the current promise information about the lines (if they had already been promised in the past). The **Proposed** pie chart shows the delay distribution of the lines in case they were to be promised now, based on the current supply picture.

![Fulfillment Line Promising Distribution](image)

### Key Insights

The **Original** pie chart is only generated for those fulfillment lines that have already been promised or scheduled in the past.
Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Fulfillment Line Exceptions - Select fulfillment lines - Check Availability - Submit - Check Availability page - Analytics</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to compare the current and proposed order promising results for a selected batch of fulfillment lines. This comparison helps you determine whether you could improve promising results if you were to promise the lines at the current point in time.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Select one or more fulfillment lines to compare.</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis cannot be shared, because it is displayed in the context of a user session and is relevant only for that point in time.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>This analysis cannot be edited.</td>
</tr>
</tbody>
</table>

Related Topics

- Scheduling Analytics and Briefing Books: Procedure

Aggregate Batch Scheduling Metrics Analysis: Explained

For a selected batch of fulfillment lines that are being checked for availability, this bar chart shows the total margin and total fulfillment cost for the selected batch of lines. The Original bars show the total margin and total fulfillment cost based on the
current promise information about the lines (assuming that they had already been promised in the past). The Proposed bars show the delay distribution of the lines in case they were to be promised now, based on the current supply picture.

Key Insights

The Original bar chart is only generated for those fulfillment lines that have already been promised or scheduled in the past.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

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<thead>
<tr>
<th>FAQ</th>
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</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Management - Order Orchestration - Manage Fulfillment Lines - Select fulfillment lines - Check Availability - Submit - Check Availability page - Analytics</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to compare the current and proposed order promising results for a selected batch of fulfillment lines. This comparison helps you determine whether you could improve total margin and reduce total fulfillment cost if you were to promise the lines at the current point in time.</td>
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<td>What prompts can I use to narrow the results of this analysis?</td>
<td>Select one or more fulfillment lines to compare.</td>
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</tbody>
</table>
Schedule Performance

Demand Line Scheduling Distribution Analysis: Explained

The Schedule Performance infotile provides insight into orders that have been scheduled late. The number on the infotile shows the overall percentage of orders that have been scheduled on time. The drill-down analytics accessed through the infotile, such as Demand Line Scheduling Distribution, provide detailed visibility into late orders.

Key Insights

This analysis shows a breakup of the on-time vs. delayed order distribution across all the orders that have been scheduled by Oracle Fusion Global Order Promising by days of delay ranges. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Schedule Performance infotile - Demand Line Scheduling Distribution</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
</tbody>
</table>
FAQ | Answer
---|---
When do I use this analysis? | When you want to understand overall order promising performance.
What prompts can I use to narrow the results of this analysis? | None
How do I share this analysis? | This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.
What tool do I use to edit this analysis? | This analysis cannot be edited.

Related Topics

- Scheduling Analytics and Briefing Books: Procedure

Scheduling Performance by Demand Line Requested Date Analysis: Explained

The Schedule Performance report provides insight into orders that have been scheduled late. The number on the infotile shows the overall percentage of orders that have been scheduled on time. Among the drill-down analytics accessed through
the infotile, Scheduling Performance by Demand Line Requested Date provides a stacked bar chart of the percentage of lines that were scheduled on-time vs late, by week.

![Scheduling Performance by Demand Line Requested Date](image)

Key Insights

This analysis provides a stacked bar chart of the percentage of lines that were scheduled on-time vs late, by week. Thus, in the example graphic, the first bar shows you that a little more than 80% of all orders that had Requested Date in the first week of the graph were scheduled on time, while a little less than 20% were delayed. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.
Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
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</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Schedule Performance infotile - Scheduling Performance by Demand Line Requested Date</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to understand overall order promising performance.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.</td>
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<td>What tool do I use to edit this analysis?</td>
<td>This analysis cannot be edited.</td>
</tr>
</tbody>
</table>

Related Topics

- Scheduling Analytics and Briefing Books: Procedure

Demand Line Count over Time Analysis: Explained

The Schedule Performance report provides insight into orders that have been scheduled late. The number on the infotile shows the overall percentage of orders that have been scheduled on time. Among the drill-down analytics accessed through
the infotile, Demand Line Count over Time indicates the overall order volume that has been scheduled by Oracle Fusion Global Order Promising over time.

### Key Insights

This analysis indicates the overall order volume that has been scheduled by Global Order Promising over time. This is a historical graph, meaning that all data points are in the past.

### Frequently Asked Questions

The following table lists frequently asked questions about this analysis.
FAQ | Answer
--- | ---
How do I find this analysis? | Order Promising work area - Overview - Schedule Performance infotile - Demand Line Count over Time
Who uses this analysis? | Order Promising Manager
When do I use this analysis? | When you want to understand overall order promising performance.
What prompts can I use to narrow the results of this analysis? | None
How do I share this analysis? | This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.
What tool do I use to edit this analysis? | This analysis cannot be edited.

Related Topics
- Scheduling Analytics and Briefing Books: Procedure

Scheduling Performance by Demand Line Creation Date Analysis: Explained

The Schedule Performance report provides insight into orders that have been scheduled late. The number on the infotile shows the overall percentage of orders that have been scheduled on time. Among the drill-down analytics accessed through
the infotile, Scheduling Performance by Demand Line Creation Date provides a stacked bar of the percentage of lines that were scheduled on-time vs late, by week. This analytic is based on order creation date.

Key Insights

This analysis provides a stacked bar chart of the percentage of lines that were scheduled on-time vs late, by week. Thus, in the example graphic, the first bar shows you that a little more than 80% of all orders that were created in the first week of the graph were scheduled on time, while a little less than 20% were delayed. You can drill down from any of the regions of the pie chart and navigate to the detailed order information. This is a historical graph, meaning that all data points are in the past. Orders are grouped into past weeks based on when the orders were created, and all order creation dates, by definition, are in the past.
Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Schedule Performance infotile - Scheduling Performance by Demand Line Creation Date</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to understand overall order promising performance.</td>
</tr>
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<td>What prompts can I use to narrow the results of this analysis?</td>
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<tr>
<td>What tool do I use to edit this analysis?</td>
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</tr>
</tbody>
</table>

Related Topics

- Scheduling Analytics and Briefing Books: Procedure

Number of Demand Lines Scheduled Late
Number of Demand Lines Scheduled Late by Item Category Analysis: Explained

The Number of Demand Lines Scheduled Late infotile displays the number of only the late demands. The drill-down analytics accessed through the infotile provide further breakdown of the detailed demands by category, ship-from source, customer and across time.

Key Insights

This analysis shows the number of demands that have been delayed, by their item category. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
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</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Number of Demand Lines Scheduled Late infotile - Number of Demand Lines Scheduled Late by Item Category</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to get visibility into which orders in your supply chain are delayed.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
What tool do I use to edit this analysis? | This analysis cannot be edited.

Related Topics
- Scheduling Analytics and Briefing Books: Procedure

Number of Demand Lines Scheduled Late by Ship-from Source Analysis: Explained

The Number of Demand Lines Scheduled Late infotile displays the number of only the late demands. The drill-down analytics accessed through the infotile provide further breakdown of the detailed demands by category, ship-from source, customer and across time.

![Number of Demand Lines Scheduled Late by Ship-from Source](image)

Key Insights
This analysis shows the number of demands that have been delayed, by where they are scheduled to ship from to the customer. The ship-from source could be an internal organization or a drop ship supplier. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Number of Demand Lines Scheduled Late infotile - Number of Demand Lines Scheduled Late by Ship-from Source</td>
</tr>
</tbody>
</table>
FAQ | Answer
---|---
Who uses this analysis? | Order Promising Manager
When do I use this analysis? | When you want to get visibility into which orders in your supply chain are delayed.
What prompts can I use to narrow the results of this analysis? | None
How do I share this analysis? | This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.
What tool do I use to edit this analysis? | This analysis cannot be edited.

Related Topics
- Scheduling Analytics and Briefing Books: Procedure

Number of Demand Lines Scheduled Late by Customer Analysis: Explained

The Number of Demand Lines Scheduled Late infotile displays the number of only the late demands. The drill-down analytics accessed through the infotile provide further breakdown of the detailed demands by category, ship-from source, customer and across time.
Key Insights
This analysis shows the number of demands that have been delayed, by customer. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.

Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
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<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Number of Demand Lines Scheduled Late infotile - Number of Demand Lines Scheduled Late by Customer</td>
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<tr>
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<td>Order Promising Manager</td>
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<td>When do I use this analysis?</td>
<td>When you want to get visibility into which orders in your supply chain are delayed.</td>
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<td>None</td>
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Related Topics

- Scheduling Analytics and Briefing Books: Procedure
Number of Demand Lines Scheduled Late by Requested Date

Analysis: Explained

The Number of Demand Lines Scheduled Late infotile displays the number of only the late demands. The drill-down analytics accessed through the infotile provide further breakdown of the detailed demands by category, ship-from source, customer and across time.

![Number of Demand Lines Scheduled Late by Requested Date](chart)

Key Insights

This analysis shows the number of demands that have been delayed, arranged by their requested date. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

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<thead>
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</table>
FAQ

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Related Topics

- Scheduling Analytics and Briefing Books: Procedure

Value of Demand Lines Scheduled Late

Value of Demand Lines Scheduled Late by Item Category Analysis: Explained

The Value of Demand Lines Scheduled Late infotile displays the dollar value of only the late demands. The drill-down analytics accessed through the infotile provide further breakdown of the detailed demands by category, ship-from source, customer and across time.

Key Insights

This analysis shows the dollar value of demands that have been delayed, by their item category. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.
Frequently Asked Questions
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<tr>
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<td><strong>Order Promising work area - Overview - Value of Demand Lines Scheduled Late infotile - Value of Demand Lines Scheduled Late by Item Category</strong></td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to get visibility into which orders in your supply chain are delayed, by dollar value.</td>
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**Related Topics**

- **Scheduling Analytics and Briefing Books: Procedure**
Value of Demand Lines Scheduled Late by Ship-from Source Analysis: Explained

The Value of Demand Lines Scheduled Late infotile displays the dollar value of only the late demands. The drill-down analytics accessed through the infotile provide further breakdown of the detailed demands by category, ship-from source, customer and across time.

![Value of Demand Lines Scheduled Late by Ship-from Source](image)

Key Insights

This analysis shows the dollar value of demands that have been delayed, by where they are scheduled to ship from to the customer. The ship-from source could be an internal organization or a drop ship supplier. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.

Frequently Asked Questions

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<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Value of Demand Lines Scheduled Late infotile - Value of Demand Lines Scheduled Late by Ship-from Source</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to get visibility into which orders in your supply chain are delayed, by dollar value.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
How do I share this analysis? | This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.
What tool do I use to edit this analysis? | This analysis cannot be edited.

**Related Topics**

- Scheduling Analytics and Briefing Books: Procedure

**Value of Demand Lines Scheduled Late by Customer Analysis: Explained**

The Value of Demand Lines Scheduled Late infotile displays the dollar value of only the late demands. The drill-down analytics accessed through the infotile provide further breakdown of the detailed demands by category, ship-from source, customer and across time.

![Value of Demand Lines Scheduled Late by Customer](image)

**Key Insights**

This analysis shows the dollar value of demands that have been delayed, by customer. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.

**Frequently Asked Questions**

The following table lists frequently asked questions about this analysis.
<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Value of Demand Lines Scheduled Late infotile - Value of Demand Lines Scheduled Late by Customer</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to get visibility into which orders in your supply chain are delayed, by dollar value.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the</td>
<td>None</td>
</tr>
<tr>
<td>results of this analysis?</td>
<td></td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>This analysis cannot be edited.</td>
</tr>
</tbody>
</table>

**Related Topics**

- Scheduling Analytics and Briefing Books: Procedure
Value of Demand Lines Scheduled Late by Requested Date Analysis: Explained

The Value of Demand Lines Scheduled Late infotile displays the number of only the late demands. The drill-down analytics accessed through the infotile provide further breakdown of the detailed demands by category, ship-from source, customer and across time.

Key Insights

This analysis shows the dollar value of demands that have been delayed, arranged by their requested date. You can drill down from any of the regions of the pie chart and navigate to the detailed order information.

Frequently Asked Questions

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Value of Demand Lines Scheduled Late infotile - Value of Demand Lines Scheduled Late by Requested Date</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to get visibility into which orders in your supply chain are delayed, by dollar value.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None</td>
</tr>
</tbody>
</table>
FAQ | Answer
---|---
How do I share this analysis? | This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.

What tool do I use to edit this analysis? | This analysis cannot be edited.

Related Topics
- Scheduling Analytics and Briefing Books: Procedure

Financial Performance

Revenue and Fulfillment Cost Analysis: Explained
The Financial Performance infotile displays key financial metrics related to the order promising process. This analysis provides insight into the revenue, fulfillment cost and margin percentage across all orders scheduled by Order Promising. The infotile displays the overall margin percentage across all scheduled orders, calculated as \( \frac{\text{Revenue} - \text{Fulfillment Cost}}{\text{Fulfillment Cost}} \), aggregated across all orders.

Revenue and Fulfillment Cost

Key Insights
This analysis displays the revenue and fulfillment cost associated with lines scheduled in Order Promising, aggregated by week.
Frequently Asked Questions
The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td><strong>Order Promising work area - Overview - Financial Performance infotile - Revenue and Fulfillment Cost</strong></td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to get visibility into the financial performance of the order promising process.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>This analysis cannot be edited.</td>
</tr>
</tbody>
</table>

Related Topics
- Scheduling Analytics and Briefing Books: Procedure

Margin Percentage by Schedule Date Analysis: Explained

The Financial Performance infotile displays key financial metrics related to the order promising process. This analysis provides insight into the revenue, fulfillment cost and margin percentage across all orders scheduled by Order Promising. The
infotile displays the overall margin percentage across all scheduled orders, calculated as \( \frac{\text{Revenue} - \text{Fulfillment Cost}}{\text{Fulfillment Cost}} \), aggregated across all orders.

**Key Insights**

This analysis displays shows margin percentage for orders scheduled by Order Promising, aggregated by scheduled date.

**Frequently Asked Questions**

The following table lists frequently asked questions about this analysis.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this analysis?</td>
<td>Order Promising work area - Overview - Financial Performance infotile - Margin Percentage by Schedule Date</td>
</tr>
<tr>
<td>Who uses this analysis?</td>
<td>Order Promising Manager</td>
</tr>
<tr>
<td>When do I use this analysis?</td>
<td>When you want to get visibility into the financial performance of the order promising process.</td>
</tr>
<tr>
<td>What prompts can I use to narrow the results of this analysis?</td>
<td>None</td>
</tr>
<tr>
<td>How do I share this analysis?</td>
<td>This analysis cannot be shared. It is also not relevant for sharing since the data is context-dependent.</td>
</tr>
<tr>
<td>What tool do I use to edit this analysis?</td>
<td>This analysis cannot be edited.</td>
</tr>
</tbody>
</table>
Related Topics

- Scheduling Analytics and Briefing Books: Procedure

Manufacturing Reports

Work Definition Report: Explained

The Work Definition Report enables you to review work definition operations including materials and resources. The report is configured by default to print in a format most suitable for a contract manufacturer such as printing only milestone operations.

Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td><strong>Work Definition work area - Overview page - Tasks panel - Print Work Definition Report</strong>  OR  <strong>Manage Work Definitions page - Select work definition - Print Work Definition Report</strong></td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Manufacturing Engineer</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
When do I use this report? | When you want to:
  - Review a work definition offline, to ensure that it has been set up correctly.
  - Exchange information offline, for example, with the contract manufacturer.

What prompts can I use to narrow the results of this report? | • From Item, To Item
• Work Definition Name
• Version as of Date
• From Version, To Version
• Version Start Date, Version End Date
• Production Priority

Note: Some of these prompts are only available when the report is run by a scheduled process, via the Print Work Definition Report task in the Tasks panel.

How do I share this report? | • Add to briefing book
• Schedule an agent to run the report

What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics
• Work Definition Reports: Explained
• Creating Briefing Books: Procedure
• Scheduling Reports: Procedure
Components List Report: Explained

The Components List Report enables you to generate and print a list of the components for a work order, and provides you the flexibility to view, save and print the report.

Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Work Execution work area - Overview page - Tasks panel - Print Components List</td>
</tr>
<tr>
<td></td>
<td>OR</td>
</tr>
<tr>
<td></td>
<td>Manage Work Orders page - Select Print Components List from the Print to PDF menu</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Production Supervisor</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>When you want to: review and manage work orders.</td>
</tr>
</tbody>
</table>
FAQ

What prompts can I use to narrow the results of this report?

<table>
<thead>
<tr>
<th>Required prompt:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• From Work Order, To Work Order</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Optional prompts:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• From Work Order Start Date, To Work Order Start Date</td>
</tr>
<tr>
<td>• Work Order Product</td>
</tr>
<tr>
<td>• Item Category</td>
</tr>
</tbody>
</table>

Note: Some of these prompts are only available when the report is run by a scheduled process, via the Print Components List task in the Tasks panel.

How do I share this report?

| • Add to briefing book |
| • Schedule an agent to run the report |

What tool do I use to edit this report?

| • Oracle Business Intelligence Publisher |

Related Topics

- Printing Components List: Explained
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure
Product Labels Report: Explained

The Product Labels Report enables you to print product labels during production execution.

Frequently Asked Questions

The following table lists frequently asked questions about this report.

<table>
<thead>
<tr>
<th>FAQ</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>How do I find this report?</td>
<td>Select <strong>Print Label</strong> from the <strong>Actions</strong> menu while performing one of the following operations:</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Print Label</strong> from the <strong>Print to PDF</strong> menu while selecting a work order on the Manage Work Orders page</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Print Label</strong> from the <strong>Actions</strong> menu while selecting work order serials on the Serial tab of the Work Order page</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Print Label</strong> from the <strong>Actions</strong> menu while Select the work order operation on the Review Dispatch List page</td>
</tr>
<tr>
<td></td>
<td>• Select the <strong>Print Label</strong> check box on the Product Details page while reporting operation transactions</td>
</tr>
<tr>
<td>Who uses this report?</td>
<td>Production Operator</td>
</tr>
<tr>
<td>When do I use this report?</td>
<td>When you want to:</td>
</tr>
<tr>
<td></td>
<td>• Review work orders</td>
</tr>
<tr>
<td></td>
<td>• Review the dispatch list</td>
</tr>
<tr>
<td></td>
<td>• Report operation transactions.</td>
</tr>
</tbody>
</table>
FAQ | Answer
--- | ---
What prompts can I use to narrow the results of this report? | The label content is generated in PDF format based on the template layout specified in the Default Label Layout Template plant parameter.

How do I share this report? | • Add to briefing book
• Schedule an agent to run the report

What tool do I use to edit this report? | • Oracle Business Intelligence Publisher

Related Topics
- Printing Labels: Explained
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure

Work Order Traveler Report: Explained
The Work Order Traveler Report enables you to print a set of documents associated with a work order. This report travels with a subassembly as it moves from one operation to another.

<table>
<thead>
<tr>
<th>Work Order Traveler</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work Order</td>
</tr>
<tr>
<td>Scheduled Start Date</td>
</tr>
<tr>
<td>Work Order Quantity</td>
</tr>
<tr>
<td>Scheduled Completion Date</td>
</tr>
<tr>
<td>Product</td>
</tr>
<tr>
<td>UOM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Work Order Operations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operation Sequence</td>
</tr>
<tr>
<td>Operation Name</td>
</tr>
<tr>
<td>Work Center</td>
</tr>
<tr>
<td>Scheduled Start Date</td>
</tr>
<tr>
<td>Scheduled Completion Date</td>
</tr>
<tr>
<td>Scheduled Quantity</td>
</tr>
<tr>
<td>Actual Start Date</td>
</tr>
<tr>
<td>Actual Completion Date</td>
</tr>
<tr>
<td>Quantity</td>
</tr>
<tr>
<td>Ready</td>
</tr>
<tr>
<td>Rejected</td>
</tr>
<tr>
<td>Scraped</td>
</tr>
<tr>
<td>Completed</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operation Materials</th>
</tr>
</thead>
<tbody>
<tr>
<td>Component</td>
</tr>
<tr>
<td>Description</td>
</tr>
<tr>
<td>Basis</td>
</tr>
<tr>
<td>Required Quantity</td>
</tr>
<tr>
<td>Issued Quantity</td>
</tr>
<tr>
<td>Open Quantity</td>
</tr>
<tr>
<td>Available On Hand</td>
</tr>
<tr>
<td>UOM</td>
</tr>
<tr>
<td>Yield</td>
</tr>
<tr>
<td>Supply Type</td>
</tr>
<tr>
<td>Supply Sub Inventory</td>
</tr>
<tr>
<td>Supply Locator</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operation Resources</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource Sequence</td>
</tr>
<tr>
<td>Resource Name</td>
</tr>
<tr>
<td>Resource Code</td>
</tr>
<tr>
<td>Type</td>
</tr>
<tr>
<td>Basis</td>
</tr>
<tr>
<td>Activity</td>
</tr>
<tr>
<td>Usage Rate</td>
</tr>
<tr>
<td>UOM</td>
</tr>
<tr>
<td>Required Quantity</td>
</tr>
<tr>
<td>Issued Quantity</td>
</tr>
<tr>
<td>Open Quantity</td>
</tr>
<tr>
<td>Start Date</td>
</tr>
<tr>
<td>Completion Date</td>
</tr>
</tbody>
</table>

Frequently Asked Questions
The following table lists frequently asked questions about this report.
FAQ | Answer
--- | ---
How do I find this report?  | Using this option, you can print travelers for multiple work orders. Also, you can schedule the printing as required: **Work Execution work area - Overview page - Tasks panel - Print Work Order Traveler**

**OR**

**Manage Work Orders page - Select work definition - Select a row - Select Print Work Order Traveler from the Print to PDF menu**

**OR**

**Work Execution work area - Overview page - Tasks panel - Review Dispatch List - Select a row in the dispatch list - Print Work Order Traveler**

Who uses this report?  | Production Supervisor, Production Operator

When do I use this report?  | When you want to print the work order traveler during production execution.

What prompts can I use to narrow the results of this report?  | These prompts are required only if the traveler is printed by clicking **Print Work Order Traveler** from the tasks menu on overview page:

- From Work Order, To Work Order
- From Work Order Start Date, To Work Order Start Date
- Work Order Product
- Work Order Type
- Work Order Status
- Item Category

There is also an option to include attachments, which can be unchecked if needed.

How do I share this report?  | • Add to briefing book
                           • Schedule an agent to run the report

What tool do I use to edit this report?  | • Oracle Business Intelligence Publisher

**Related Topics**

- Printing Work Order Traveler: Explained
- Creating Briefing Books: Procedure
- Scheduling Reports: Procedure
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.
   - Set ownership of this item: Click to become the owner of the folder or object.
   - 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.

Using Briefing Books

Creating Briefing Books: Procedure

A briefing book is a collection of updatable or static analyses or dashboard pages (which can contain reports). The static snapshots give you a picture of what’s going on at the time that the analysis or dashboard page is added to the briefing book. You can download briefing books as PDF or MHTML for viewing or printing, and share them with others. The PDF file includes a table of contents for the book. Like analytics and reports, briefing books are stored in the business intelligence (BI) catalog.

Adding Content to New Briefing Books

Follow these steps:

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click the Browse Catalog button.
3. Select your analysis, then click More and select Add to Briefing Book.
Or, find your dashboard and click Open.
   a. Go to the dashboard page you want to add.
   b. Click the Page Options button and select Add to Briefing Book.
4. Indicate if you want the analysis or dashboard results to change (Updatable) or not (Snapshot) whenever the briefing book is downloaded or rerun.
5. Click Browse.

Adding Content to Existing Briefing Books

Follow these steps:
1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click Browse Catalog.
3. Select your analysis, then click More and select Add to Briefing Book.
   Or, find your dashboard and click Open.
   a. Go to the dashboard page you want to add.
   b. Click the Page Options button and select Add to Briefing Book.
4. Indicate if you want the analysis or dashboard results to change (Updatable) or not (Snapshot) whenever the briefing book is downloaded or rerun.

Downloading and Editing Briefing Books

Follow these steps:
1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click Browse Catalog to locate your briefing book.
   You can find briefing books only in the BI catalog.

Related Topics
• Reports and Analytics Pane: Explained

Scheduling Analytics and Reports

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**

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.

Make sure to include the .xdo extension for the report definition.

**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:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Scheduler Job Package Name</td>
<td>The path for the job definition, for example: / oracle/apps/ess/&lt;product family&gt;/ &lt;product&gt;/ &lt;business area&gt;/ Jobs</td>
</tr>
<tr>
<td>Enterprise Scheduler Job Definition Name</td>
<td>The job definition name (not display name), for example: ABCDEFG</td>
</tr>
</tbody>
</table>

Related Topics

- Setting Up the Reports and Analytics Pane: Procedure
- Accessing Report Components to Customize: Points to Consider

Scheduling Analytics and Briefing Books: Procedure

Analytics and briefing books 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 create what’s called an agent to set this all up for an analysis, dashboard, or briefing book. The agent itself is saved as an object in the business intelligence (BI) catalog.

Creating an Agent

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click the Browse Catalog button.
3. Click New and select Agent under Actionable Intelligence.
4. Ensure that you enter information on the Delivery Content tab to specify the analysis, dashboard, or briefing book to run.
5. Save the agent in My Folders.

Note: To edit an agent, browse the BI catalog to find the agent.
Scheduling Reports: Procedure

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’s 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 pane, 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 pane 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

- Scheduled Processes: Explained
- Reports and Analytics Pane: Explained
- Managing Scheduled Processes That You Submitted: Points to Consider
- Submitting Scheduled Processes and Process Sets: Procedure

Adding Analyses to Application Pages
Adding an Analysis to the Concepts Details Dashboard: Worked Example

This example shows how to add an analysis to the Supply Chain Management Concepts Details dashboard. You can add analyses to many pages that you can personalize or customize.

⚠️ **Caution:** Make sure that the analysis isn’t querying against a large volume of records. If it is, then the page can take a long time to open after you add the analysis.

The following table summarizes key decisions for this scenario.

<table>
<thead>
<tr>
<th>Decisions to Consider</th>
<th>In This Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Which analysis do you want to add?</td>
<td>Concepts with most Related Ideas</td>
</tr>
<tr>
<td></td>
<td>Ensure that the analysis isn’t querying against a large volume of records. If it is, then the dashboard can take a long time to open after you add the analysis.</td>
</tr>
<tr>
<td>Do you have to change the layout of the page?</td>
<td>Yes, to a two-column layout that is wider on the right side. The one- or two-column layout gives enough space to properly display analyses.</td>
</tr>
<tr>
<td>Do you want all or only one view of the analysis?</td>
<td>All views.</td>
</tr>
<tr>
<td>Are these changes for you only, or for all users of the Concepts Details dashboard?</td>
<td>You only.</td>
</tr>
</tbody>
</table>

**Adding an Analysis**

1. Open the Concepts Details dashboard.
2. Click your name in the global header and select **Edit Current Page**.
3. Click **Change Layout** and select **Two columns, narrow left**.
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 **Concepts with most Related Ideas**, you can select a specific view to add.
6. Click **Close** after you see the analysis added to the top of the wider column on the dashboard.
7. Click **Save** and then **Close**.
8 Maintenance and Migration

Performance Tuning for Analytics and Reports: Points to Consider

When you create analytics and reports, don’t use blind queries and include sufficient filters when creating analytics or reports with hierarchies.

Blind Queries
Avoid blind queries because they are performed without filters and therefore fetch large data sets. Performance could be an issue with these queries and can easily overload the application. All Transactional Business Intelligence queries on large transaction tables must be time bound. For example, include a time dimension filter and additional filters to restrict by key dimensions such as worker. In addition, apply filters to columns that have database indexes in the transaction tables. This ensures a good execution plan is generated for the Business Intelligence query.

Hierarchies and Trees in Transactional Business Intelligence
Queries on trees and hierarchical dimensions such as manager can have an impact on performance. Transactional Business Intelligence uses a column-flattening approach to quickly fetch data for a specific node in the hierarchy. Still, because there is no pre-aggregation for the different levels of the hierarchy, carefully craft any query involving hierarchies to ensure that sufficient filters are applied to keep the result set small.

Reviewing SQL Statements Used in Analyses: Procedure

You can review the SQL statement using either of the following procedures.

Using Analysis in 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.

Using 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.
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:
   - 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.
Glossary

**analysis**
A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.

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

**briefing book**
A collection of static or updatable analyses or dashboard pages that you can download, print, and share with others.

**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.

**business intelligence repository**
The metadata that determines all of the columns, or pieces of data, that you can include in analytics. You can also use the repository as a source of data for reports.

**customization**
A change to the predefined artifacts of the application. Customizations impact multiple users.

**dashboard**
A collection of analyses and other content, presented on one or more pages to help users achieve specific business goals. Each page is a separate tab within the dashboard.

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

**EDI**
Abbreviation for electronic data interchange.

**EFT**
Acronym for Electronic Funds Transfer. A direct transfer of money from one account to another, such as an electronic payment of an amount owed a supplier by transferring money from a payer’s disbursement bank account into the supplier’s bank account.

**flexfield**
A flexible data field that you can customize to contain one or more segments or store additional information. Each segment has a value and a meaning.
flexfield segment
An extensible data field that represents an attribute and captures a value corresponding to a predefined, single extension column in the database. A segment appears globally or based on a context of other captured information.

global area
The region at the very top of the user interface that remains the same no matter which page you’re on.

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.

panel tab
A tab on the right side of the page that slides out when you open it. Each panel tab has an icon as the tab label.

personalization
A change that users make to control the look or behavior of the application. Personalizations impact only the user making the change.

prompt
A parameter that you set when you use analytics, limiting the data in the analysis or in all analyses on the dashboard or dashboard page (tab).

regional area
The collapsible region in the work area that lets you control what’s in the local area, for example by selecting a task or running a search.

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

role
Controls access to application functions and data.

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

subject area
A set of columns, or pieces of data, related to a specific business object or area.

view
A specific way to present the results of an analysis, for example as a table or graph. Other types of views, such as the title view, show other components of the analysis.
work area
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.