Oracle® Fusion Intelligence For E-Business Suite

Implementation Guide

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Primary Author: Marilyn Crawford, Steven Schaefer

Contributing Author: Vic Mitchell, Amit Kothari, Amit Mittal, Anurag Garg, Ashok Verma, Bhaskar Ghosh, Catherine Bauer, Debasis Dutta, Francoise Lawrence, Gowri Arur, Greg Rippstein, Judy Krawec, Julian Challenger, Karuna Mukherjea, Kathryn Chen, Khalid Kazi, Ling Xiang, Madhavi Gopaladasu, Maneesha Nanda, Mark Rowe, Miranda Lu, Mohamed Hussain, Neelam Singh, Olga Basman, Penelope Brown, Pournima Patil, Purnima Raghunath, Rajesh Dharamshi, Ramasamy Palaniappan, Sangeeta Ananth, Sanjiv Kumar, Sapna Meghani, Sayekumar Arumugam, Sourish Chatterjee, Sreenivas Davuluri, Srinivasan Ganesan, Stephen Sherlock, Sudhakar Babu, Suraj Dyre, Vasavi Pedapudi, Veena Bhandarkar, Vikas Bansal, Vikram Takru

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Oracle Fusion Intelligence For E-Business Suite Implementation Guide, Release 11*i*

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Fusion Intelligence For E-Business Suite Implementation Guide.*

This guide refers to the following Fusion Intelligence For E-Business Suite applications:

- Fusion Financials Intelligence For E-Business Suite
- Fusion Compliance Intelligence for E-Business Suite
- Fusion Human Resources Intelligence For E-Business Suite
- Fusion Supply Chain and Order Management Intelligence For E-Business Suite
- Fusion Procurement Intelligence For E-Business Suite
- Fusion Service Intelligence For E-Business Suite
- Fusion Marketing and Sales Intelligence For E-Business Suite

See Related Information Sources on page xi for more Oracle Applications product information.

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Structure

1 Introduction

This chapter gives an overview of the application, covering integrations, terminology, and architecture.

2 Set Up Fusion Intelligence

This chapter covers setups required to use Fusion Intelligence for E-Business Suite, including Daily Business Intelligence setups and configuration of OBIEE and the BI Server.

3 Security

This chapter describes the security configurations and new seeded BI responsibilities used in Fusion Intelligence for E-Business Suite.

4 Fusion Financials Intelligence

This chapter discusses the three Fusion Financials Intelligence dashboards, describing pages, requests, and prompts for each.

5 Fusion Compliance Intelligence

This chapter covers the Financial Statement Certifications dashboard, listing the pages, requests, and prompts used.

6 Fusion Human Resources Intelligence

This chapter explains the Human Capital Management (Manager) dashboard, including drill in place reports.

7 Fusion Marketing and Sales Intelligence

This chapter covers setting up the Fusion Marketing and Sales repository. For this release, no dashboards or reports are seeded or shipped.

8 Fusion Supply Chain and Order Management Intelligence

This chapter discusses the two dashboards used with Fusion Supply Chain and Order Management Intelligence: Manufacturing Analysis, and Order Booking and Fulfillment Analysis.

9 Fusion Procurement Intelligence

This chapter covers the Procurement Analysis dashboard.

10 Fusion Service Intelligence

This chapter talks about the Customer Support Catalog, which you can use to create reports and dashboards.

A Dimensions and Facts

This appendix lists the dimensions and facts that are delivered with Fusion Intelligence for E-Business Suite.

B Request Sets

This appendix lists the subject areas in Fusion Intelligence For E-Business Suite for which you can create request sets.

Related Information Sources

The Fusion Intelligence For E-Business Suite Implementation Guide provides you with implementation information for your Fusion Intelligence applications. Additional, essential information describing the setup and design of your system resides in companion documentation.

> **Note:** This guide documents only the delivered, prebuilt dashboards, reports, subject areas, and security setup for Fusion Intelligence applications for the Oracle E-Business Suite. Before reading this guide, read the Oracle Business Intelligence Enterprise Edition documentation for information on the underlying architecture of Fusion Intelligence applications. Also read the related Oracle E-Business Suite guides for a more detailed, field-level explanation of the data that is used in these applications.

This table lists the books that are cross-referenced in this document. All of these documents are available on Oracle*MetaLink*:

Cross-Referenced Books in This Document

Document	Description
Oracle Business Intelligence Infrastructure Installation and Configuration Guide	This guide provides information on installing and configuring the infrastructure or platform components of Oracle Business Intelligence on approved operating system platforms and deployments. This version of the guide applies to infrastructure (platform) releases of Oracle Business Intelligence Enterprise Edition. **Note:** The Oracle Business Intelligence Infrastructure Installer installs the platform components, not the applications components.
Oracle Business Intelligence Server Administration Guide	This is an infrastructure guide that contains post-installation and configuration content that pertains to setting up the Oracle Business Intelligence Server (Oracle BI Server). The guide discusses how to plan, create, and administer the Physical, Business Model and Mapping, and Presentation layers in the Oracle BI Repository. The guide primarily covers tasks that are performed in the Oracle BI Administration Tool utility.
Oracle Business Intelligence Presentation Services Administration Guide	This guide provides post-installation configuration and administration procedures for Oracle BI Presentation Services, Oracle BI Answers, Oracle BI Delivers, Oracle BI Interactive Dashboards, and the Oracle BI Presentation Catalog and Catalog Manager. Additionally, the guide discusses Oracle BI Presentation Services security, logging, user interface, and integrations using HTTP.
Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide	This guide is for Oracle BI report and dashboard designers and end users of Fusion Intelligence applications.

Document	Description
Oracle Daily Business Intelligence Implementation Guide	This guide describes the common concepts for Daily Business Intelligence. It describes the product architecture and provides information on the common dimensions, security considerations, and data summarization flow. It includes a consolidated setup checklist by page and provides detailed information on how to set up, maintain, and troubleshoot Daily Business Intelligence pages and reports.
About Fusion Intelligence For E-Business Suite, Family Pack H Also included are application-specific About Documents for Financials, Compliance, Human Resources, Sales, and Supply Chain Management.	Refer to the About Documents for information about your release, including new features, new components, and installation information.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Introduction

This chapter gives an overview of the application, covering integrations, terminology, and architecture.

This chapter covers the following topics:

- Overview of Fusion Intelligence For E-Business Suite
- Common Terminology Used in this Implementation Guide
- Subject Areas
- Architecture
- Repository
- Physical Layer
- Business Model and Mapping Layer
- Presentation Layer
- Oracle BI Presentation Services
- Navigation

Overview of Fusion Intelligence For E-Business Suite

Fusion Intelligence applications enhance the flexibility of Oracle Daily Business Intelligence (DBI). These applications are implemented on top of DBI, so much of the implementation process is completed by installing DBI. This guide covers only procedures and information that are not already covered in the *Oracle DBI Implementation Guide* and Oracle Business Intelligence Enterprise Edition (OBIEE) documentation.

The Fusion Intelligence applications are interactive, comprehensive analytical applications that offer insight into your financials, human resources, sales, procurement, service, supply chain, order management, procurement, and compliance operations. You can deploy all of the Fusion Intelligence applications together for a complete, integrated analytic solution, or deploy the applications modularly to meet your specific business and budgetary requirements.

The applications contain prebuilt, role-based dashboards that help you quickly analyze key performance indicators, reports, and metrics to spot trends and determine if your area of the business is on track. The applications also provide a library of prebuilt reports, prompts, and filters that present data in interactive charts, graphs, and grids. From a dashboard or report, you can drill into the source data in the transaction processing application to view transaction details and take corrective action. Security rules ensure that personalized content is generated for specific users and roles.

The dashboards are tailored for an end user's role in an organization. You can grant each role with access to specific objects, such as subject areas, dashboards, and reports. Additionally, you can control access to specific data rows by using secured dimensions.

Fusion Intelligence applications include a single, prebuilt repository that contains the metadata that maps to intelligence areas in the DBI repository. The Oracle BI Repository consists of Physical, Business Model and Mapping, and Presentation metadata layers that contain common definitions of metrics, hierarchies, and calculations against the data.

The servers, programs, and tools in OBIEE provide the infrastructure foundation for Fusion Intelligence applications. The metadata repository file, and dashboard and report catalog file, are objects in OBIEE. Oracle BI Answers, Delivers, and Interactive Dashboards are used to create the dashboards, requests, and business monitoring activity in the Fusion Intelligence applications.

Fusion Intelligence Integrations

The key integration points between Fusion Intelligence For E-Business Suite applications and E-Business Suite products are:

- Single application login.

  You can sign onto Oracle E-Business Suite transaction applications and access Fusion Intelligence dashboards and reports from the Application Navigator, without encountering an additional signon page.

- Security at the object and data level.

  Fusion Intelligence applications honor the security context that you set up in Oracle E-Business Suite. Additionally, you can set up Oracle BI Server groups in Fusion Intelligence applications to match user roles in Oracle E-Business Suite. In this situation, the system automatically adds the user to the group for the current session, and applies the group's permissions to the user.

- Drill between dashboards and transaction applications.

  You can click a link in an interactive dashboard or report to drill to a transaction page in a new browser window for more details, while maintaining the data and security.

- Synchronized data model.

  A guided drill path is built into the analytic model so you can view aggregated data to understand trends. From summary reports, you can drill in place to detailed reports to investigate exceptions or problems. From there you can drill in place to the underlying transaction system to act upon the source data to resolve problems.

  > **Note:** This release of Fusion Intelligence supports only site-level configuration of dashboards.

Common Terminology Used in this Implementation Guide

These are common terms that are used in this implementation guide.

Terminology

Term	Description
Connection Pool	An object in the Physical layer of the repository that contains information about the connection between the Oracle BI Server and the data source.
DBI Repository	A collection of DBI facts that have been populated by running an initial or incremental load.

Term	Description
Dimensions	Represents the organization of logical columns (attributes) that belong to a single logical dimension table. Examples of dimensions are time periods, products, markets, customers, suppliers, promotion conditions, raw materials, manufacturing plants, transportation methods, media types, and time of day. In dimensions, you can organize attributes into hierarchical levels. These levels represent your business reporting requirements. Common dimensions contain a set of dimensional attributes that can be shared by all subject areas or marts. The Fusion Intelligence applications share 17 common dimensions: • Company • Cost Center • Currency • Customer • Financial Category • Geography • HR Organization • Inventory Organization • Item • Ledger • Manager Hierarchy • Operating Unit • Person

Term	Description
	• Resource • Sales Channel • Sales Group • Time
Facts	A logical collection of measures, or calculated data, such as the sum of salaries relating to workforce compensation. Facts can be specified in terms of dimensions. For example, you might want to determine the sum of revenue dollars for a given product in a given market over a given time period.
Filters and Prompts	Filters are built into requests and are used to limit the results that appear on a dashboard. A report that appears on a dashboard shows only those results that match the filter criteria. Filters are applied on a column-level basis. Certain filters inherit the values that users specify in dashboard prompts. A prompt is another kind of filter that can apply to all items in a dashboard. Some prompts, such as date or period, can be common to all dashboards. Other prompts, such as commodity, are unique to a specific dashboard. Prompts are synonymous with parameters. See: Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide, "Filtering Requests in Oracle BI Answers."
Folders	In the Oracle BI Presentation Services user interface, folders provide the ability to organize an Oracle BI Web Catalog and its contents, such as reports.

Term	Description
Fusion Intelligence For E-Business Suite Applications	Refers to these applications: • Fusion Financials Intelligence For E-Business Suite • Fusion Compliance Intelligence for E-Business Suite • Fusion Human Resources Intelligence For E-Business Suite • Fusion Marketing and Sales Intelligence For E-Business Suite • Fusion Supply Chain and Order Management Intelligence For E-Business Suite • Fusion Procurement Intelligence For E-Business Suite • Fusion Service Intelligence For E-Business Suite
Guided Navigation	A link to navigate to the transaction processing application, another dashboard, or a URL. This link can be set up to appear conditionally based on the results of a report or key performance indicator.
Key Performance Indicators (KPIs)	Strategic business factors that are used for reporting. KPIs are designed to monitor performance on strategic business factors such as Revenue or Operating Margin.
Oracle Business Intelligence Answers (Oracle BI Answers)	A component within the Oracle BI Enterprise Edition technology that is used to create ad hoc queries into an organization's data. Oracle BI Answers provide a set of graphical tools to create and execute requests for information. Requests can be saved in the form of reports, and shared, modified, formatted, or embedded in a dashboard.

Term	Description
Oracle Business Intelligence Enterprise Edition (OBIEE)	A comprehensive suite of enterprise business intelligence products that contain the programs, servers, and tools to support broad, self-service access across the organization. OBIEE is the foundation for Fusion Intelligence For E-Business Suite applications.
Oracle Business Intelligence Delivers (Oracle BI Delivers)	A proactive intelligence solution that provides business activity monitoring and alerting for out-of-tolerance situations to target owners and subscribers.
Oracle Business Intelligence Interactive Dashboards (Oracle BI Interactive Dashboards)	Collections of content that are designed to meet the needs of particular user roles. A dashboard is the user interface that provides a knowledge worker with intuitive, interactive access to information that is actionable and dynamically personalized, based on the individual's role and identity.
Oracle Business Intelligence Presentation Catalog (Oracle BI Presentation Catalog)	A collection of subject areas that are defined in the metadata repository layer.
Requests (Reports)	The building blocks of business intelligence dashboards. Requests (reports) are created by using Oracle BI Answers to retrieve and display an organization's data. Data can be displayed in a variety of graphical formats. Links can be established in the chart or table of a report to launch another report to offer guided analysis.
Star Schema	A data warehouse schema in which a fact table is associated with a series of dimension tables.

Subject Areas

This section provides an overview of the delivered Presentation catalogs (which are also called subject areas) in Fusion Intelligence applications.

When you click the Answers link from any location in a Fusion Intelligence application, the Oracle Answers start page appears with a list of subject areas in the workspace. A subject area contains columns and filters that represent information about the areas of your organization's business, or about groups of users within your organization.

The metadata in Fusion Intelligence subject areas maps to data that is stored in these intelligence areas in the DBI repository:

- Financials Intelligence
- Regulatory Compliance Intelligence
- Human Resources Intelligence
- Supply Chain Intelligence
- Fusion Procurement Intelligence
- Customer Support Intelligence
- Sales Intelligence

> **Note:** To fully understand subject areas, familiarize yourself with the data models in the DBI repository.

Fusion Intelligence For E-Business Suite provides insight into information in these subject areas, which are grouped by intelligence area:

Subject Areas

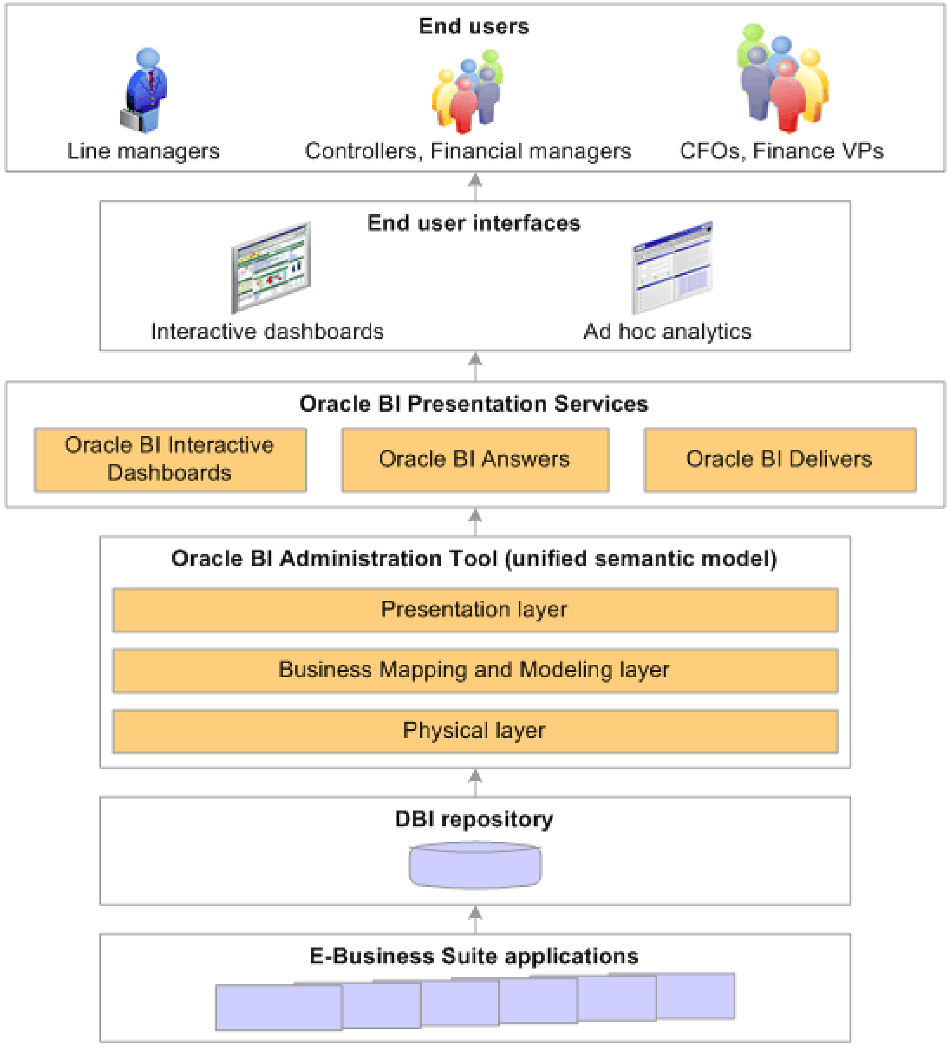
Intelligence Area	Subject Area Folders
Fusion Financials Intelligence	Payables Operations Analysis Profit and Loss Analysis Receivables Operations Analysis
Fusion Human Capital Intelligence	Workforce Management (Manager) Workforce Management (Organization)
Fusion Marketing and Sales Intelligence	Sales Intelligence
Fusion Procurement Intelligence	Procurement Catalog
Fusion Compliance Intelligence	Financial Statement Certifications
Fusion Service Intelligence	Customer Support Catalog

Intelligence Area	Subject Area Folders
Fusion Supply Chain and Order Management Intelligence	Inventory Catalog Manufacturing Catalog Order Booking and Fulfillment Catalog Product Margin Catalog Quality Catalog

Architecture

This diagram depicts the relationship between the Oracle DBI repository, Oracle BI components such as Oracle Answers, Oracle Delivers, and the Administration Tool, and interactive dashboards such as the ones in Fusion Intelligence applications:

Fusion Intelligence Architecture

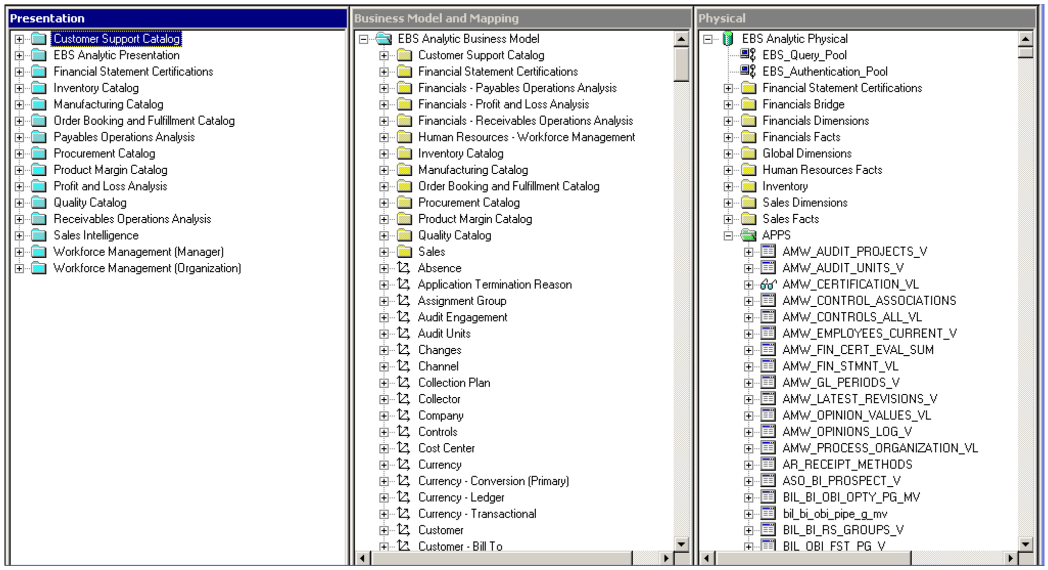


OBIEE is implemented on the E-Business Suite 11i.10 tech stack.

Repository

Prebuilt metadata content is maintained in the metadata repository file named EBSAnalyticMaster.rpd that is shared by all Fusion Intelligence For E-Business Suite applications. The repository contains the Physical, Business Model and Mapping, and Presentation layers that are discussed in the following sections. The Oracle BI Administration Tool is the user interface into the layers in the repository, as shown in this example:

Oracle BI Administration Tool



Physical Layer

A Physical table is an object in the Physical layer of the Oracle BI Administration Tool that corresponds to an object in a Physical database. The Physical layer folder stores the shortcuts (references) to physical tables. Physical tables are typically imported from a database or another data source, and they provide the metadata necessary for the Oracle BI Server to access the tables. The Physical layer represents the physical structure of the data sources to which the Oracle BI Server submits queries.

Business Model and Mapping Layer

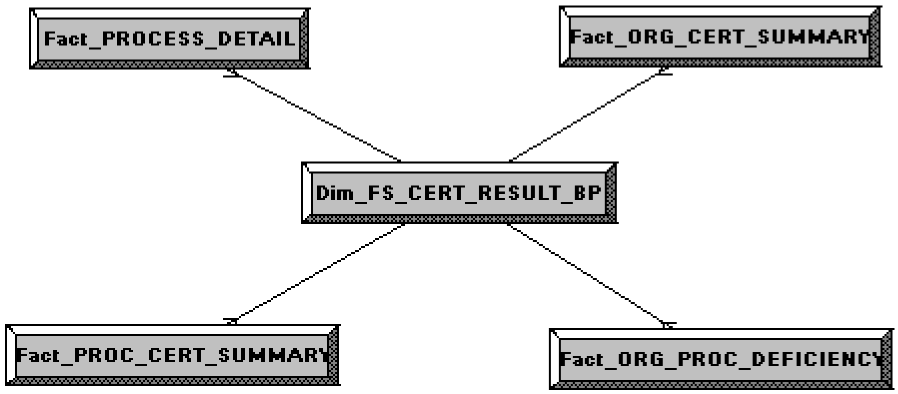
The Business Model and Mapping layer represents the logical structure of the information in the repository. The physical schemas are simplified and reorganized based on the users' view of the data. The business models contain logical columns arranged in logical tables (logical dimension tables and logical fact tables), logical joins, and dimensional hierarchy definitions. This layer also contains the mappings from the logical columns to the source data in the Physical layer.

The Business Model and Mapping layer appears in the middle pane of the Oracle BI Administration Tool.

Generally, each logical display folder in this layer represents a business area. Each folder has a shortcut (reference) to all of the logical dimension and fact tables that are joined together in a star schema.

For example, *Financial Certification Result* is the name of a logical display folder. It contains the logical dimension table named *Dim_FS_CERT_RESULT_BP*, and logical fact tables for *PROCESS_DETAIL, ORG-CERT_SUMMARY, PROC_CERT_SUMMARY,* and *ORG_PROC_DEFICIENCY.* The logical display folder should contain all of the dimensions and facts that are required for the given star schema. This is an example of the star schema for the *Financial Certification Result* logical folder:

Financial Certification Result Star Schema



Dimensional Hierarchies

Many of the results that appear in Fusion Intelligence applications represent hierarchical data structures. A hierarchy is a set of parent-child relationships between certain attributes within a dimension. The hierarchy attributes, called levels, roll up from child to parent. For example, months can roll up to years. Therefore, if an aggregate table exists at the month level, that table can be used to answer questions at the year level by summing all of the month-level data for a year.

Fusion Intelligence applications deliver metadata with prebuilt hierarchies.

Presentation Layer

The Presentation layer represents subject areas in Fusion Intelligence applications. This layer provides a way to present a customized view of a business model, known as Presentation catalog, to different sets of users. The Presentation layer appears in the left pane of the Oracle BI Administration Tool. For each subject area that appears in the Oracle Answers pane, dimensions appear at the top followed by facts.

The Presentation layer simplifies the business model and makes it easy for users to understand and query. It exposes only the data that is meaningful to the users, and organizes the data in a way that aligns with the way that users think about the data.

Each subject area must be populated with contents from a single business model; the contents cannot span business models. The name of the subject area is the same as the corresponding logical display folder.

Oracle BI Presentation Services

This section discusses:

- Oracle BI Answers
- Oracle BI Interactive Dashboards
- Web Catalog File

See: *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide.*

Oracle BI Answers

Oracle BI Answers is a user interface that is part of the Oracle BI Presentation Services component of OBIEE.

Oracle BI Answers is the embedded reporting tool that allows users with the appropriate permissions to build and modify reports that let end users explore and interact with information, and drill in place to source data. You can access these reports either from the delivered dashboards, or from the Oracle Answers Catalog pane on the Oracle Answers page.

On the Oracle Answers page, you can also access the subject area folders that coincide with Oracle BI Presentation Catalog folders. The fact and dimension folders and columns appear in a subject area folder, just as they do in the Presentation Catalog.

See: *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide,* "Basics of Working with Requests in Oracle BI Answers."

Oracle BI Dashboards

Oracle BI Dashboards is another user interface that is part of the Oracle BI Presentation Services component of OBIEE.

Interactive Dashboards provide points of access for analytics information. A dashboard is made up of sections of information that can contain items such as results from Oracle BI Answers, external Web content, HTML text, graphics, and links to other dashboards.

Dashboard content is logically organized into pages. The pages appear as tabs across the top of the screen in Oracle BI Interactive Dashboards. A dashboard page is designed to meet the needs of a particular role. For example, the Financial Performance Trend dashboard page is designed for financial executives and managers who want to analyze historical performance for various financial items on a periodic basis.

To access a dashboard, your EBS Responsibility Key must be assigned to the appropriate Presentation Catalog group in OBIEE. Your EBS application security settings determine the data that you can see on each dashboard. For example, procurement managers can view purchases only for the operating units for which they are responsible.

Every dashboard or report can have a set of prompts that determine the data that appears. When you change the value of a prompt on a dashboard, and click the Go button, the system automatically refreshes the data on the dashboard. Changing a prompt can affect the amount of data, the column headings, the KPI values, and the graph formats.

See: *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide,* "Using Oracle BI Interactive Dashboards."

Web Catalog

The Oracle BI Web Catalog stores the application dashboards and report definitions, and contains information regarding permissions and accessibility of the dashboards by groups. Prebuilt web catalog content is maintained in a folder called EBSAnalyticMaster, which the instanceconfig.xml file references.

Navigation

Users with the appropriate permissions can log into Oracle E-Business Suite and access Fusion Intelligence applications from the standard Oracle Navigator. In Fusion Intelligence applications, you can click links to view Dashboards, Answers, Delivers, Administration, and My Account. The views that you can access are determined by your EBS responsibilities.

See: *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide,* "Using Oracle BI Interactive Dashboards," Navigating in Oracle BI Interactive Dashboards.

2

Set Up Fusion Intelligence

This chapter covers setups required to use Fusion Intelligence for E-Business Suite, including Daily Business Intelligence setups and configuration of OBIEE and the BI Server.

This chapter covers the following topics:

- Prerequisites
- Set Up Daily Business Intelligence
- Configure OBIEE

Prerequisites

The following software is required to use Fusion Intelligence For E-Business Suite applications. You must complete the installation of this software before you implement Fusion Intelligence For E-Business Suite applications:

- Oracle Daily Business Intelligence, release 7.3.
- Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.

Set Up Daily Business Intelligence

Below is a list of setup steps and post setup steps for Daily Business Intelligence framework and common features that are required to use Fusion Intelligence For E-Business Suite applications.

Detailed information on these setup steps is located in the *Oracle Daily Business Intelligence Implementation Guide*, "Set Up Daily Business Intelligence" chapter.

- Verify hardware and software prerequisites.
- Create an implementation plan.

- Assign responsibilities to implementers.

  Note: New responsibilities are delivered with OBIEE.

- Set up multiple organization architecture.
- Set up global parameters.
- Administer dashboards and reports.
- Set up geography dimension.
- Set up operating unit security.
- Upgrade item dimension.
- Set up the product catalog hierarchy.
- Run DBI item dimension setup request set.
- Define source ledger group.
- Define financial dimensions.
- Manage dimension values and hierarchies.
- Set up budgets and forecasts.
- Set up security for general ledger and expense reporting data.
- Set up general ledger profile options.
- Set up payables profile options.
- Set up inventory organization security.
- Set up users as employees.
- Review POA: DBI implementation profile options.
- Set up document views.
- Set up commodities.
- Set up DBI for financials profile options and source ledger group assignment.
- Set DBI for sales profile options.

- Run initial load of opportunity log tables concurrent program.
- Set up sales group hierarchy for DBI for service contracts.
- Determine collection start date.
- Set up financial category dimension.
- Synchronize financial data.
- Map financial accounts.
- Set up item dimension.
- Set OM: DBI installation profile option.
- Associate item with inventory category set, product category set.
- Ensure complete subledger postings.
- Set reporting units of measure.
- Set up resource groups.
- Identify time based resources.
- Identify the unit of measure representing hours.
- Set baseline plan.
- Set up request type security.
- Set up the planning instance.
- Set up Oracle Process Manufacturing resource warehouses (required for the Manufacturing catalog).
- Run plans in Oracle Advanced Supply Chain Planning (required for the Manufacturing catalog).

This is a summary of the post setup steps:

- Update sales group and district hierarchies.
- Create initial and incremental request sets for the installed dashboards.
- Run initial request set for the installed dashboards.
- Set up users, including the new Fusion Intelligence responsibilities.

- Schedule incremental request sets.

Configure OBIEE

A major feature of Fusion Intelligence applications is the establishment of a security bridge between Oracle E-Business Suite applications and OBIEE to allow a single login for transactional pages and analytic dashboards. To support this, the Oracle BI Presentation Server uses an external authentication mechanism, which allows the Oracle BI Presentation Server to collect parameters from HTTP queries, HTTP cookies, and HTTP headers, and submit these to the Oracle BI Server.

Users are required to log in through E-Business Suite.

Configuration Steps

These are the high level steps that are required to configure OBIEE for Fusion Intelligence applications:

- Update the Oracle BI Server configuration file.
- Initialize static repository variables.
- Set the password property for connection pools.
- Update the Oracle BI Presentation Server configuration file.
- Specify the Oracle BI Presentation Server URL profile option value.
- Start/restart Oracle BI Services.

Oracle BI Server Configuration

To ensure the user's security context is properly set, the BI Server repository file must be properly configured to transfer authentication to the E-Business Suite (EBS) FND security model. Several initialization blocks and session variables are created to reuse the security context from the EBS session.

Oracle BI Server Configuration File

The configuration file, named NQSConfig.ini, holds configuration settings for the Oracle BI Server. Upon installation, the NQSConfig.ini should be modified to point to the repository that is delivered with the Fusion Business Intelligence Application.

The [REPOSITORY] section of the NQSConfig.ini file should be updated to point the EBSAnalyticMaster.rpd repository file:

Star = EBSAnalyticMaster.rpd, DEFAULT;

Initialization Blocks

The system uses initialization blocks to initialize dynamic repository variables, system session variables, and non-system session variables. These initialization blocks have been created for authentication:

Name	Purpose	Session Variables
FndGetSecContext	Used to set the EBS security context.	RESP_ID RESP_APPL_ID SECURITY_GROUP_ID RESP_NAME EMPLOYEE_ID USER
FndGetResp	Used to map OBIEE Admin group context to EBS responsibility context.	GROUP

See: *Oracle Business Intelligence Server Administration Guide,* "Creating and Administering the Physical Layer in an Oracle BI Repository," Setting Up Connection Pools.

Repository Variables

The following static repository variables have been created in the Fusion Intelligence application:

- Static_DSN_OLTP: Refers to the user's data source for connecting to the Fusion Intelligence database.

  The EBS_Authentication_Pool and EBS_Query_Pool connection pools use this value to connect to the database.

- Static_USER_ID: Refers to the APPS user id that is used to connect to the Fusion Intelligence database.

After installation of the Fusion Intelligence application, the Administrator must:

- Go to the Variable Manager in the Oracle BI Administration tool and update the Default Initializer values for the above repository variables to supply the connection information for the Fusion Intelligence transactional database.

- Update the APPS password to connect to the Fusion Business Intelligence database by setting the password property in the Physical layer of the repository for both the EBS_Authentication_Pool and EBS_Query_Pool connection pools.

Session Variables

Session variables are created and assigned a value when each user logs on. They obtain their values from initialization blocks and are primarily used when authenticating users against external sources, such as the FND security model. The following session variables have been created to authenticate Fusion Intelligence application users and match the OBIEE security context to the E-Business Suite security context:

OBIEE Session Variable Name	Oracle Applications Variable Name	Initialization Block
USER	USER_NAME	FndGetUserName
GROUP	N/A	FndGetGroup
USER_ID	USER_ID	FndGetUserName
RESP_ID	RESP_ID	FndGetSecContext
RESP_NAME	RESP_NAME	FndGetSecContext
SECURITY_GROUP_ID	SECURITY_GROUP_ID	FndGetSecContext
EMPLOYEE_ID	EMPLOYEE_ID	FndGetSecContext

Connection Pools

In Fusion Intelligence applications, the DBI repository provides the data source for the Physical layer. A Physical layer can have multiple data sources. Each data source must have at least one corresponding connection pool, which contains data source information that the system uses to connect to a data source, the number of connections allowed, timeout information, and other connectivity-related administrative details. Connection pools allow multiple concurrent data source requests (queries) to share a single database connection, reducing the overhead of connecting to a database.

Oracle delivers two connection pools—EBS_Query_Pool and EBS_Authentication_Pool.

The EBS_Query_Pool connection pool is used by Presentation Services queries. The default properties are:

Property	Value
Name	EBS_Query_Pool

Property	Value
Call Interface	Default (OCI 8i/9i)
Data Source Name	VALUEOF(Static_DSN_OLTP)
Shared Logon	Yes
User Name	VALUEOF(Static_USER_ID)
Password	<user specified>
Enable Connection Pooling	Yes
Parameters Supported	No

For performance reasons, the system uses the EBS_Authentication_Pool connection pool exclusively for authentication initialization blocks. The default properties are:

Property	Value
Name	EBS_Authentication_Pool
Call Interface	OCI 8i/9i
Data Source Name	VALUEOF(Static_DSN_OLTP)
Shared Logon	Yes
User Name	VALUEOF(Static_USER_ID)
Password	<user specified>
Enable Connection Pooling	Yes
Parameters Supported	Yes

The EBS_Authentication_Pool has been set up to validate the user's EBS session and to apply the appropriate Oracle Application's security context within the OBIEE layer.

The EBS_Query_Pool and EBS_Authentication_Pool connection pools refer to the Static_DSN_OLTP and Static_USER_ID static repository variables. The Administrator must:

- Update these variables in the Variable Manager to match to the Fusion Intelligence application database and Oracle Applications APPS user ID, as documented in the Repository Variables section above.

- Update the password property for each connection pool to match the Oracle Applications APPS password. The password value will be encrypted.

Oracle BI Presentation Server Configuration

The Oracle BI Presentation Server is responsible for retrieving EBS security-related information when a user navigates from EBS to OBIEE.

When you launch content from the EBS menu, the OracleOasis.jsp function is called with specialized logic to build the desired URL. The JSP logic uses parameters defined in the JSP function as well as FND profile option values specified by the installer for the web server host and port to build the URL and launch OBIEE.

Oracle BI Presentation Server Configuration File

The configuration file, named *instanceconfig.xml,* holds configuration settings for the Oracle BI Presentation Server. To support the Fusion Intelligence application's integration of OBIEE with EBS, the installer must update the instanceconfig.xml file to supply the Oracle Application session cookie name to the Presentation Server. To do this, add the following <auth> tag to the instanceconfig.xml file following the existing <DSN>tag.

```
<Auth>

<ExternalLogon enabled="true">

<ParamList>

<Param name="NQ_SESSION.ICX_SESSION_COOKIE"

source="cookie"

nameInSource="cookie_name"/>

<Param name="NQ_SESSION.ACF"

source="url"

nameInSource="acf"/>

</ParamList>

</ExternalLogon>

</Auth>
```

The installer must update the nameInSource property for the NQ_SESSION.ICX_SESSION_COOKIE parameter to match the ICX cookie name set by the EBS system. This is by default the two_task for the EBS environment.

Oracle BI Presentation Server URL

Fusion Intelligence applications use one EBS profile option—FND: Oracle Business Intelligence Suite EE base URL. The profile option is used by the OracleOasis.jsp logic to build the Presentation Services URL.

Upon installation, the installer must set the value using the format <protocol>://<machine.domain>.<port> to point to the machine where the Oracle BI Presentation Services server is installed; for example, http://yourname.oracle.com:8080. You can configure this profile at any level.

Cache Management

For this release of the OBIEE, if you run an initial or incremental load without first clearing the query cache, it is possible that reports that you run after the load process will reuse the cache that existed prior to the load process. This can result in inconsistencies between reports. There are several alternatives to mitigate this situation, such as:

- Configure the query cache to expire daily.
- Clear the cache tables manually as needed; for example, after you complete a load process.
- Schedule the system to clear the cache tables at the same frequency as the incremental load process.

To clear cached queries:

1. Open the Oracle BI Administration Tool in online mode.
2. Click Manage, Cache to access the Cache Manager page and select all cache entries.
3. Click Action, Refresh.

To disable the cache:

1. Locate this configuration file: <root directory>\OracleBI\server\Config\NQSConfig.INI.
2. In the Query Result Cache Section, change the [CACHE] setting from ENABLE = YES; to ENABLE = NO;.
3. Save the NQSConfig.INI configuration file and restart the Oracle BI Server service.

See: *Oracle Business Intelligence Server Administration Guide,* "Query Caching in the OracleBI Server" chapter for more information on query caching in OBIEE.

3

Security

This chapter describes the security configurations and new seeded BI responsibilities used in Fusion Intelligence for E-Business Suite.

This chapter covers the following topics:

- Security Overview
- Responsibilities
- Menus and Functions

Security Overview

Security in Fusion Intelligence applications can be broadly classified into three configuration types---user authentication, dashboard object security, and data access security. All three configuration types play a vital role in securing data. This table discusses the security configurations that are delivered with Fusion Intelligence For E-Business Suite applications:

Security Configurations

Security Configuration	Description
User authentication	Users access Fusion Intelligence applications by signing on to Oracle E-Business Suite and navigating directly to Fusion Intelligence dashboards, without encountering a secondary signon page for Fusion Intelligence. The system leverages the existing Oracle Applications FND security model to authenticate users and permit access to Oracle Applications, including Fusion Intelligence applications, with a single user signon.

Security Configuration	Description
Dashboard object security	The user's membership in Oracle BI Server groups controls the user's access to Oracle BI Administration Tool objects, such as subject areas, presentation tables, and presentation table columns in the repository. The user's membership in Presentation Catalog groups controls the user's access to Oracle BI Presentation Catalog objects, such as dashboards, reports, and catalog folders. When a user logs into the system, and the user's EBS responsibility matches an Oracle BI Server group or Presentation Catalog group, the system automatically assigns the appropriate object permissions to the user. This release of Fusion Intelligence applications delivers Oracle BI Server groups and Presentation Catalog groups that match delivered EBS responsibilities for Fusion Intelligence content. Object security is assigned in Fusion Intelligence applications to the predefined groups. **Note:** When you create custom dashboards in OBIEE, you can restrict access to dashboards, dashboard pages, and other Presentation Catalog objects. Use the Oracle BI Repository to restrict access to the underlying data.

Security Configuration	Description
Data access security	EBS secures dimension and fact table data using the FND user context, responsibility context, or a combination of the two. The system maintains existing data security that is defined in EBS when users access the same data in OBIEE. As with user security, the FND security model leverages existing data security with VPD, RBAC and/or MOAC in the EBS application. You can establish additional data security between Fusion Intelligence applications and Oracle online transaction applications by creating Oracle BI Server groups in the BI Administration Tool that match user responsibilities in EBS. When a user navigates to a report, the data that appears is based on permissions that are granted to the user's responsibilities, and any additional group filters and restrictive conditions that are applied to the Oracle BI Server group. When an Oracle BI Server group maps exactly to a Presentation Catalog group, the Presentation Catalog group inherits the permissions from the Oracle BI Server group. The system does not require that every Oracle BI Server group map exactly to a Presentation Catalog group.

Responsibilities

A user's role in the organization controls the user's access to objects (such as dashboards, reports, and catalog folders) in the Oracle BI Presentation Catalog. Presentation Catalog groups are defined by the system or by an administrator. For this release of Fusion Intelligence, the supported setup is for the user's assignment to EBS responsibilities to filter through to the OBIEE layers. Security on users is not suggested in OBIEE for this release of Fusion Intelligence.

Several new business intelligence responsibilities are seeded in Oracle applications for Fusion Intelligence. Matching responsibilities with the same RESPONSIBILITY_KEY (to support translation) are created in the BI Server repository file. You can create new responsibilities; however, you must also set up a matching Oracle BI Server group and Presentation Catalog group, and assign permissions to the appropriate subject areas and Presentation Catalog objects.

This table lists the delivered sample Presentation Catalog groups and the subject areas that users in those groups can access:

Delivered Sample Presentation Catalog Groups and Business Areas

EBS Responsibility	Catalog Group	Subject Area	Shared Folder
Financial Statement Analysis	RCI_OBIEE_FINSTMTCERT	Financial Statement Certifications	Compliance Intelligence
Payables Operations Analysis	FII_OBIEE_AP_RESP	Payables Operations Analysis	Financials Intelligence
Profit and Loss Analysis	FII_OBIEE_PL_RESP	Profit and Loss Analysis	Financials Intelligence
Receivables Operations Analysis	FII_OBIEE_AR_RESP	Receivables Operations Analysis	Financials Intelligence
Customer Support Manager	BIV_DBI_CUST_SUPP_MGMT	Customer Support Catalog	Human Capital Intelligence
Department Manager	HRI_OBI_ALL_ORGH	Workforce Management (Organization)	Human Capital Intelligence
Human Capital Management Analyst (Manager)	HRI_OBIEE_WRKFC_MGRH	Workforce Management (Manager)	Human Capital Intelligence
Human Capital Management Analyst (Organization)	HRI_OBIEE_WRKFC_ORGH	Workforce Management (Organization)	Human Capital Intelligence
Line Manager	HRI_OBI_ALL_MGRH	Workforce Management (Manager)	Human Capital Intelligence
Procurement Manager	POA_DBI_VP_PROC	Procurement Catalog	Supply Chain Intelligence
Quality Intelligence	ISC_QT_DBIEE_QUALITY	Quality Catalog	Supply Chain Intelligence

EBS Responsibility	Catalog Group	Subject Area	Shared Folder
Supply Chain Manager	ISC_DBI_VP_OPS	Inventory Catalog	Supply Chain Intelligence
Supply Chain Manager	ISC_DBI_VP_OPS	Manufacturing Catalog	Supply Chain Intelligence
Supply Chain Manager	ISC_DBI_VP_OPS	Order Booking and Fulfillment Catalog	Supply Chain Intelligence
Supply Chain Manager	ISC_DBI_VP_OPS	Product Margin Catalog	Supply Chain Intelligence
Sales Analysis	BIL_OBIEE_SALES_ MANAGER	Sales Intelligence	None
Oracle Business Intelligence Administrator	BIS_OBIEE_ADMIN (has Presentation Server Administrator access)	All of the above	All of the above

Oracle BI Administrators

The BIS_OBIEE_ADMIN security group in OBIEE corresponds to the Oracle Business Intelligence Administrator responsibility in EBS. There are two menu options for this responsibility—Oracle BI Answers and Oracle BI Dashboards. As part of setup, if you enable integration with EBS, you must assign this responsibility to users who administer the Oracle BI Presentation Services. This responsibility has access to all web and repository content, such as shared folders, subject areas, and so on.

Users

You can create users using the traditional forms interfaces. These users are stored in the FND_USERS database table and do not need to be created in the OBIEE application.

Deploying Fusion Intelligence Permissions

The default deployment approach for this release of Fusion Intelligence addresses the needs of business analyst users. The business analyst role is primarily responsible for custom report creation on behalf of functional users in an organization. The business analyst role should have access to the Oracle BI Answers and Oracle BI Interactive Dashboards to build additional dashboards and answers to deploy across the organization. Business analysts should leverage the delivered dashboards and answers as a starting point for their work.

As delivered, the content in Fusion Intelligence For E-Business Suite is set up with read-only access. Oracle discourages you from overwriting the delivered content. Instead, use it as a starting point to create company-specific dashboards and answers.

Menus and Functions

Fusion Intelligence delivers Oracle application functions that the system uses to launch each delivered Fusion Intelligence dashboard. The functions are created by using the OracleOasis.jsp function call for launching external requests, and are the Self Service Web Applications JSP type. The functions are associated with Fusion Intelligence menus, which are standard Oracle application menus.

This is an example of the JSP function:

Type: SSWA JSP function

Web HTML Call:

OracleOasis.jsp?mode=OBIEE &function=Answers&parameters=SubjectArea~"Profit and Loss Analysis"

OracleOasis.jsp?mode=OBIEE
&function=Dashboard%parameters=PortalPath~/shared/Financials%20Intelligence/
_Portal/Profit%20and%20Loss%20Analysis

4

Fusion Financials Intelligence

This chapter discusses the three Fusion Financials Intelligence dashboards, describing pages, requests, and prompts for each.

This chapter covers the following topics:

- Prerequisites
- Understanding Fusion Financials Intelligence
- Profit and Loss Analysis Dashboard and Catalog
- Receivables Operations Analysis Catalog
- Payables Operations Analysis Catalog
- Securing Data

Prerequisites

Before you implement the Fusion Financials Intelligence For E-Business Suite application, you must implement Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.

Review *About Fusion Intelligence For E-Business Suite, Family Pack H,* which is available on Oracle*MetaLink*, and ensure that all hardware and software prerequisites are complete.

Additional, catalog-specific prerequisites are discussed further in this chapter.

Understanding Fusion Financials Intelligence

Fusion Financials Intelligence For E-Business Suite offers three catalogs, prepackaged and prepopulated business semantic models (metadata layer), that enable you to easily build powerful financial reports to gain valuable insight. It provides seamless integration with Oracle E-Business Suite applications, empowering business users to drive insight to action. Guided drill paths are built into the analytic model, allowing users to view aggregated data and understand trends.

This application also offers a prebuilt dashboard and accompanying reports, providing an at-a-glance analysis of profit and loss by company and cost center. This information helps managers stay informed, empowering them to track whether the company's revenue, cost of goods sold, and expenses are meeting the forecasted and budgeted amounts, and how well the company is meeting financial goals.

Please see Appendix A, page A-1 for a list of facts and dimensions that are contained in the intelligence catalogs.

Profit and Loss Analysis Dashboard and Catalog

The Profit and Loss Analysis dashboard helps financial users to analyze and track revenue and expenses with the budget and the forecast, and compare them to the revenue and expenses in the prior year. Revenue and expenses can be analyzed across dimensions such as company, cost center, and financial category. The Profit and Loss Analysis dashboard empowers managers to monitor pre-close profit and loss activity, tracking the current activity against both the previous year's activity and the forecasted and budgeted activity for the current period and year. In addition, it offers guided navigation functionality, which alerts financial users to potential revenue shortage and expense overflows, encouraging them to take timely corrective action. Information available in this dashboard and catalog is secured by company and cost center, so managers can see information only for the companies and cost centers for which they are responsible.

In addition to the prebuilt dashboards, users can utilize the Profit and Loss Analysis Catalog to create ad hoc reports and additional dashboards with ease, using the Oracle BI Answers component of the OBIEE technology. The Profit and Loss Analysis catalog is a predefined metadata layer that contains a variety of metrics, attributes, and dimensions that you can leverage to build desired reports.

Prerequisites - Profit and Loss Analysis Dashboard and Catalog

The Profit and Loss Analysis dashboard and catalog are dependent on the installation of Oracle General Ledger.

Implementation Tasks

The Profit and Loss Analysis dashboard and catalog share the same set up steps with Oracle Daily Business Intelligence for Financials: Profit and Loss Analysis, release 7.3.

See: *Oracle Daily Business Intelligence Implementation Guide,* "Daily Business Intelligence for Financials," Implementing General Ledger Revenue and Expense Reporting.

Profit and Loss Analysis Dashboard

This table lists the delivered Fusion Financials Intelligence For E-Business Suite dashboard page, requests, and prompts that are available on or accessible from the Profit and Loss Analysis dashboard:

Delivered Pages, Requests, and Prompts for Profit and Loss Analysis Dashboard

Pages	Requests	Prompts
Profit and Loss Analysis (Main)	Profit and Loss Analysis KPIs Profit and Loss Budget/Forecast Analysis Revenue Trend (by Enterprise Year, Quarter, Month) Revenue (by Company, Cost Center, Financial Category) Cost of Goods Sold Trend (by Enterprise Year, Quarter, Month) Cost of Goods Sold (by Company, Cost Center, Financial Category) Expenses Trend (by Enterprise Year, Quarter, Month) Expenses (by Company, Cost Center, Financial Category)	Year Quarter Month Company Cost Center
Revenue Summary	Revenue Summary Graph (by Company, Cost Center, Financial Category) Revenue for Top 10 (Companies, Cost Centers, Financial Categories) Revenue Summary (by Company, Cost Center, Financial Category)	Year Quarter Month Two of the following three prompts are also available based on the drill source: Company Cost Center Financial Category

Pages	Requests	Prompts
Revenue by Account Detail	Revenue by Account Detail	Year Quarter Month
Revenue by Source	Revenue by Source	Year Quarter Month Ledger Functional Currency
Cost of Goods Sold Summary	Cost of Goods Sold Summary Graph (by Company, Cost Center, Financial Category) Cost of Goods Sold for Top 10 (Companies, Cost Centers, Financial Categories) Cost of Goods Sold Summary (by Company, Cost Center, Financial Category)	Year Quarter Month Two of the following three prompts are also available based on the drill source: Company Cost Center Financial Category
Cost of Goods Sold by Account Detail	Cost of Goods Sold by Account Detail	Year Quarter Month
Cost of Goods Sold by Source	Cost of Goods Sold by Source	Year Quarter Month Ledger Functional Currency

Pages	Requests	Prompts
Expenses Summary	Expenses Summary Graph (by Company, Cost Center, Financial Category) Expenses for Top 10 (Companies, Cost Centers, Financial Categories) Expenses Summary (by Company, Cost Center, Financial Category)	Year Quarter Month Two of the following three prompts are also available based on the drill source: Company Cost Center Financial Category
Expenses by Account Detail	Expenses by Account Detail	Year Quarter Month
Expenses by Source	Expenses by Source	Year Quarter Month Ledger Functional Currency

This diagram shows the flow of the dashboard pages:

Profit and Loss Analysis Dashboard Flow

Guided Navigations

Guided navigations assist users in the exploration of results that appear on dashboard pages. The Fusion Financials Intelligence application delivers Guided Navigation sections that appear conditionally based on the results of certain key performance indicators (KPIs). When the system detects that one of these KPIs has reached its predefined threshold, a link appears in the Guided Navigation section to guide you to a summary report or dashboard page for further investigation.

This table lists the dashboard pages, alert names, threshold descriptions, and navigation target pages for the delivered guided navigations:

Delivered Guided Navigations

Dashboard Page	Alert Name	Threshold Description	Guided Navigation Target Page
Profit and Loss Analysis	Revenue Summary	Revenue ÷ forecast ≤ 0.95 and quarter end date – sysdate ≤ 10 (Revenue alert is only meaningful at the end of a quarter.)	Revenue Summary by Company
Profit and Loss Analysis	Cost of Goods Sold Summary	COGS ÷ budget ≥ 0.95	Cost of Goods Sold Summary by Company
Profit and Loss Analysis	Expenses Summary	Expense ÷ budget ≥ 0.95	Expenses Summary by Company

Receivables Operations Analysis Catalog

Receivables Operations Analysis helps financial users to analyze receivables operations efficiency, including open receivables aging, billing activity, and receipts activity.

The Receivables Operations Analysis catalog provides a rich repository of measures and dimensions that allows you to quickly specify key performance indicators and easily build a variety of reports. These reports enable receivables and collection managers to identify, monitor, and resolve issues concerning their department's operations efficiency. The resulting improvement in receivables and collections operations efficiency can lead to better cash flow and add to the company's bottom line. For example, with up-to-date information about customer activities, receivables and collections managers can direct their departments to resolve past due accounts before they become serious problems. The provided set of measures allows managers to evaluate the performance of their organizations, discover systemic processing inefficiencies, and evaluate the productivity of individual collectors who report to them. Furthermore, reports built using the Receivables Operations Analysis catalog can provide valuable insight into the state of customer receivables payment patterns, and enable credit managers to formulate the most effective and profitable credit policies for the company. Increased visibility into the receivables and collections operations reduces the amount of time it takes for operational problems to be discovered and resolved. Reduced problem discovery and resolution times increase the effectiveness of the receivables and collections departments and help companies to be more profitable.

Prerequisites - Receivables Operations Analysis Catalog

Before you use the Receivables Operations Analysis catalog, you must implement Oracle Receivables.

Implementation Tasks

The Receivables Operations Analysis catalog shares most of the same setup steps with Oracle Daily Business Intelligence for Financials: Receivables Reporting, release 7.3, with one exception—the Receivables Intelligence Setup page. The Receivables Intelligence Setup page has two parts:

- Data Collection Selection Criteria
- Days Sales Outstanding Definition

The Receivables Intelligence Setup page has limited impact on the Receivables Operations Analysis catalog in the following ways:

The Data Collection Selection Criteria affects the following dimensions in the Receivables Operations Analysis catalog:

- Time - Transaction Filter Date
- Time - Receipt Filter Date

The Days Sales Outstanding Definition affects the Open Receivables and Receipts Summary fact - Billed Amount measure in the Receivables Operations Analysis catalog.

See: *Oracle Daily Business Intelligence Implementation Guide,* Receivables Implementation.

Payables Operations Analysis Catalog

Payables Operations Analysis helps financial users evaluate critical payables processing activities, such as entering invoices, aging open payables, resolving holds, and paying invoices.

The Payables Operations Analysis catalog provides a rich repository of measures and associated dimensions that can be leveraged to build a variety of reports for both payables managers and analysts. Managers can be empowered by gaining critical insight into vital operational metrics, allowing them to evaluate the department's performance and take corrective actions to improve the department's efficiency. Payables analysts can be assisted with accurately assessing their daily workload and identifying the most critical outstanding issues, such as open invoices, unresolved holds, and discount opportunities. In short, it is a valuable starting point for providing essential information to payables professionals and enabling them to stay on top of everyday challenges and opportunities.

Prerequisites - Payables Operations Analysis Catalog

Before you use the Payables Operations Analysis catalog, you must implement Oracle Payables.

Implementation Tasks

The Payables Operations Analysis catalog shares the same setup steps with Oracle Daily Business Intelligence for Financials: Payables Reporting, release 7.3.

See: *Oracle Daily Business Intelligence Implementation Guide,* Payables Implementation.

Securing Data

These responsibilities are set up as Oracle BI Server groups and Oracle Presentation Catalog groups, and delivered with the Fusion Financials Intelligence application:

- FII_OBIEE_AP_RESP - Use this group to access the Payables Operations Analysis catalog.
- FII_OBIEE_PL_RESP - Use this group to access the Profit and Loss Analysis catalog.
- FII_OBIEE_AR_RESP - Use this group to access the Receivables Operations Analysis catalog.

See: *Oracle Daily Business Intelligence Implementation Guide,* Preface, Introduction, Securing Data.

5

Fusion Compliance Intelligence

This chapter covers the Financial Statement Certifications dashboard, listing the pages, requests, and prompts used.

This chapter covers the following topics:

- Prerequisites
- Understanding Fusion Compliance Intelligence
- Financial Statement Certifications Dashboard
- Securing Data

Prerequisites

Before you implement the Fusion Compliance Intelligence For E-Business Suite application, which contains the Financial Statement Certifications dashboard, you must implement:

- Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.
- Oracle's E-Business Suite online transaction applications, release 11.5.10, that supply compliance data to the DBI repository.

Review *About Fusion Intelligence For E-Business Suite, Family Pack H,* which is available on Oracle*MetaLink*, and ensure that all hardware and software prerequisites are complete.

Understanding Fusion Compliance Intelligence

Fusion Compliance Intelligence For E-Business Suite delivers a prebuilt Financial Statement Certifications dashboard with reports that provide an at-a-glance analysis of the many factors that affect compliance with Sarbanes-Oxley. Under Sarbanes-Oxley Section 404, an issuer must provide an assessment, as of the end of the issuer's fiscal year, of the effectiveness of the company's internal controls and procedures for financial reporting as of the end of the period covered by each annual and quarterly report that the company is required to file under the Exchange Act.

Please see Appendix A, page A-1 for a list of facts and dimensions that are contained in the Financial Statement Certifications Catalog.

Financial Statement Certifications Dashboard

The Financial Statement Certifications dashboard provides a top-level summary of certifications for signing officers. It displays up-to-date information about the certification status of organizations and processes. Signing officers can also drill in place to supporting reports for details.

This table lists the delivered Fusion Compliance Intelligence dashboard page, requests, and prompts that are available on or accessible from the Financial Statement Certifications dashboard:

Delivered Pages, Requests, and Prompts for Financial Statement Certifications Dashboard

Pages	Requests	Prompts
Significant Account Evaluation	Significant Account Evaluation Summary - Account Significant Account Evaluation Summary - Process Significant Account Evaluation Summary - Audit Significant Account Evaluation Detail Organization Deficiency Detail Process Detail Risk Detail Control Detail	Period Period Name Certification Type Certification Status Certification Process Organization

Pages	Requests	Prompts
Organization Certification	Organization Certification Summary - Certification Organization Certification Summary - Process Organization Certification Summary - Audit Organization Certification Detail Process Deficiency Details Process Details Risk Detail Control Details	Period Period Name Certification Type Certification Status Certification Process Significant Account
Process Certification	Process Certification Summary - Certification Process Certification Summary - Risk Process Certification Summary - Control Open Issue Detail Process Certification Details Risk Detail Control Details	Period Period Name Certification Type Certification Status Certification Organization Significant Account

Securing Data

The responsibility named Financial Statement Certification Analysis (RCI_OBIEE_FINSTMTCERT) is set up as an Oracle BI Server group and Oracle Presentation Catalog group. These security groups are delivered with the Fusion Compliance Intelligence application.

See: *Oracle Daily Business Intelligence Implementation Guide,* Preface, Introduction, Securing Data.

6

Fusion Human Resources Intelligence

This chapter explains the Human Capital Management (Manager) dashboard, including drill in place reports.

This chapter covers the following topics:

- Prerequisites
- Understanding Fusion Human Resources Intelligence
- Human Capital Management (Manager) Dashboard
- Guided Navigation
- Securing Data
- Implementation Tasks
- System Profiles
- Additional Setup Tasks

Prerequisites

Before you implement the Fusion Human Resources Intelligence For E-Business Suite application, you must implement:

- Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.
- Oracle Daily Business Intelligence, release 7.3.
- Oracle's E-Business Suite online transaction applications, release 11.5.10, that supply data to the DBI repository.

Review *About Fusion Intelligence For E-Business Suite, Family Pack H,* which is available on Oracle*MetaLink*, and ensure that all hardware and software prerequisites are complete.

Understanding Fusion Human Resources Intelligence

Fusion Human Resources Intelligence For E-Business Suite provides an end-to-end business intelligence reporting tool for activities related to HR management. It enables self-service management reporting for executives and managers dealing with workforce, absence, salary, and recruitment. Using this tool, you can generate standard reports with multiple options to monitor enterprise activities.

The Fusion Human Resources Intelligence For E-Business Suite application contains metadata that maps to the Oracle DBI repository.

Please see Appendix A, page A-1 for a list of facts and dimensions that are contained in the Workforce Management (Manager) Catalog and Workforce Management (Organization) Catalog.

Human Capital Management (Manager) Dashboard

The Overview page of the Human Capital Management (Manager) dashboard provides a high-level summary of the other pages on this dashboard.

The Workforce Profile and Activity page displays workforce trends of your subordinates, team composition, and work duration ratio. It provides information such as the headcount or full time equivalent (FTE) of hires, separations, and transfers.

The Turnover and Retention page gives you the tools to generate high-level reports that display employee turnover statistics such as current headcount, promotions, and separation status.

The Recruitment page displays recruitment metrics such as the number of offers and hires in the pipeline.

The Compensation page correlates salary and headcount or FTE trends, and salaries of employees across geographies in the selected currency.

The Leave and Absence page provides a high-level summary of absence information for managers' hierarchies. Absences are trended over a selected period.

This table lists the delivered Human Capital Management (Manager) dashboard pages, requests, and prompts that are available on or accessible from each page:

Delivered Pages, Requests, and Prompts for Human Capital Management (Manager) Dashboard

Pages	Requests	Prompts
Overview	Human Capital Management Overview KPIs Workforce Overview Trend Workforce Trend Top Voluntary Turnover Employee Turnover Trend Employee Turnover Status Recruitment Process Stage Time Trend Recruitment Process Stage Shed Rates Top Average Salaries Salary Workforce Trend Employee Annualized Salary Status Absence Overview Trend Absence & Workforce Status	Year Quarter Month Top Manager
Workforce Profile & Activity	Workforce Profile & Activity KPIs Workforce Overview Trend Workforce Composition Status Employee Part Time to Full Time Ratio Trend Workforce Activity Employee Promotions Trend Employee Promotions Matrix	Year Quarter Month Top Manager

Pages	Requests	Prompts
Turnover & Retention	Turnover & Retention KPIs	Year
	Employee Turnover Trend	Quarter
	Top Voluntary Turnover	Month
	Regrettable Losses Details	Top Manager
	Employee Turnover Status	
	Employee Terminations Status	
	Employee Turnover Matrix	
Recruitment	Recruitment KPIs	Year
	Recruitment Process Stage Time Trend	Quarter
		Month
	Recruitment Process Stages Completed	Top Manager
	Recruitment Process Effectiveness - Hire Retention Trend	
	Recruitment Process Time Analysis	
	Recruitment Process - Stage Shed Rates	
Compensation	Compensation KPIs	Year
	Salary Workforce Trend	Quarter
	Top Average Salaries	Month
	Employee Annualized Salary Status	Top Manager
	Employee Annualized Salary Trend	
	Employee Annualized Salary Matrix	

Pages	Requests	Prompts
Leave & Absence	Leave & Absence KPIs	Year
	Absence Overview Trend	Quarter
	Absence & Workforce Status	Month
	Absence Duration Trend	Top Manager
	Absence Status	

Drill in Place Reports for Fusion Human Resources Intelligence

This table lists dashboard pages and report columns from which you can drill in place to detailed reports to investigate exceptions or problems:

Drill in Place Reports for Fusion Human Resources Intelligence

Dashboard Page	Report Column	Target Page
Workforce Profile & Activity	Workforce Total (Headcount)	Workforce Profile & Activity
		Workforce Composition (Status) - Manager Hierarchy Access
	Employee Turnover (%)	Turnover & Retention
		Employee Turnover (Status) - Manager Hierarchy Access
	Employee Separations	Terminations Breakdown Trend
	Workforce Total Headcount - Net Transfers	Workforce Overview (Trend) - Manager Hierarchy Access
		Workforce Activity (Status) - Manager Hierarchy Access

Dashboard Page	Report Column	Target Page
	Employee Promotions	Employee Promotions (Trend) - Manager Hierarchy Access
		Employee Promotions (Matrix) - Manager Hierarchy Access
	Total Workforce	Workforce Composition (Matrix) - Manager Hierarchy Access
		Workforce Composition (Detail) - Manager Hierarchy Access
	Headcount (End of Period)	Workforce Composition (Status) - Manager Hierarchy Access
		Workforce Composition (Matrix) - Manager Hierarchy Access
		Workforce Composition (Detail) - Manager Hierarchy Access
	Transfer In	Workforce Transfer In Detail
	Transfers Out	Workforce Transfer Out Detail
Turnover & Retention	Workforce Total Headcount	Workforce Overview (Trend) - Manager Hierarchy Access
		Workforce Composition (Trend) - Manager Hierarchy Access
		Workforce Composition (Status) - Manager Hierarchy Access

Dashboard Page	Report Column	Target Page
	Employee Separations (Headcount)	Employee Terminations (Trend) - Manager Hierarchy Access
		Employee Terminations (Status) - Manager Hierarchy Access
	Employee Turnover (%)	Employee Turnover (Trend) - Manager Hierarchy Access
		Employee Turnover (Status) - Manager Hierarchy Access
	Average Period of Service (Years)	Workforce Composition (Trend) - Manager Hierarchy Access
		Workforce Composition (Status) - Manager Hierarchy Access
	Employee Headcount	Workforce Composition (Status) - Manager Hierarchy Access
		Workforce Composition (Matrix) - Manager Hierarchy Access
	Separations (Headcount) - Total	Employee Terminations Status
	Turnover (%) - Total	Employee Turnover Matrix
Recruitment	Hires (Count)	Hires Detail
	Offers Made	Recruitment Application Process - Offer Detail
	Offers Accepted	Recruitment Application Process - Offer Accepted Detail
	Hires via a Requisition	Hires Detail

Dashboard Page	Report Column	Target Page
	Applications Received	Recruitment Application Process - Application Received (Detail) - Manager Hierarchy Access
	Assessment Starts	Recruitment Application Process - Assessment Start Detail
Compensation	Annualized Salary Total (Primary Currency)	Employee Salary (Trend) - Manager Hierarchy Access Employee Salary (Status) - Manager Hierarchy Access
Leave & Absence	Absences (Count)	Absence Status
	Absence Duration (Days)	Absence Status
	Total Absences	Absence Detail

Guided Navigation

Guided navigations assist users in the exploration of results that appear on dashboard pages. The Fusion Human Resources Intelligence application delivers a Guided Navigation section that appears conditionally based on the results of certain key performance indicators (KPIs). When the system detects that one of these KPIs has reached its predefined threshold, a link appears in the Guided Navigation section to guide you to a summary report or dashboard page for further investigation.

This table lists the dashboard page, alert name, threshold description, and navigation target page for the delivered guided navigation:

This is the guided navigation for the Human Capital Management Overview page:

- Threshold Description: Voluntary Turnover of at least one of your directs is greater than your target of 20%
- Guided Navigation Target Page: Turnover & Retention

Securing Data

These responsibilities are set up as Oracle BI Server groups and Oracle Presentation

Catalog groups, and delivered with the Fusion Human Resources Intelligence application:

- HRI_OBI_ALL_MGRH - Use this group to access the Workforce Management (Manager) catalog using the Line Manager responsibility.
- HRI_OBI_ALL_ORGH - Use this group to access the Workforce Management (Organization) catalog using the Department Manager responsibility.
- HRI_OBIEE_WRKFC_MGRH - Use this group to access the Workforce Management (Manager) catalog using the Human Capital Management Analyst (Manager) responsibility.
- HRI_OBIEE_WRKFC_ORGH - Use this group to access the Workforce Management (Organization) catalog using the Human Capital Management Analyst (Organization) responsibility.

See: *Oracle Business Intelligence Server Administration Guide,* "Security in Oracle BI."

Fusion Human Resources Intelligence uses organization security or supervisor security to determine users' access to the workforce data at the organization and manager level.

As part of your implementation plan, identify who will use Fusion Human Resources Intelligence and the information that they require, and determine the security method that you want to use.

Supervisor-Based Security

With supervisor-based security, you can restrict a manager's security permissions so that the manager can only access the records for those workers within a manager hierarchy. This restriction enables secure, reliable data access, and ensures that only people with the correct permissions can access data. Managers cannot view information about their supervisor or peer managers. You define supervisor-based security when you set up the supervisor hierarchy in Oracle Human Resources.

Fusion Human Resources Intelligence supports the following responsibilities to implement supervisor-based security:

- Line Manager: Assign this responsibility to enable managers to view data of their reports. When managers log in with this responsibility, Fusion Human Resources Intelligence uses the person defined in the Users window to display data.
- Human Capital Management Analyst (Manager): Assign this responsibility to users for the purpose of data analysis at the manager level.

> **Note:** Ensure that you set the HRI: HCM Analyst (Manager View) Top profile option to enable users to access data.

Supervisor-Based Security Example

A. Mathew is the Recruitment Manager in Staffing Inc. You need to set up Fusion Human Resources Intelligence access for A. Mathew to enable him to:

- View details of workers who report to him.
- View recruitment data in the Staffing Inc organization so that he can analyze recruitment processes. C. Reed is the VP of Staffing Inc organization.

Complete the following steps:

1. Assign the Line Manager responsibility to A. Mathew to enable him to access the data of his reports.
2. Assign the Human Capital Management Analyst (Manager) responsibility to A. Mathew and set the HRI: HCM Analyst (Manager View) Top profile option value to C. Reed at the user level. With this setting, A. Mathew can access C. Reed's manager hierarchy.

Organization-Based Security

With organization-based security, you can restrict a user's security permissions so that the user can only access the records for those workers within an organization hierarchy.

Fusion Human Resources Intelligence supplies the following organization responsibilities and user profiles to implement organization-based security:

- Department Manager: Assign this responsibility to line managers to enable them to view information of their departments or organizations. The profile that you set for this responsibility is HRI: Line Manager (Organization View) Top at the user level.
- Human Capital Management Analyst (Organization): Assign this responsibility to users for the purpose of data analysis at the organization level. Set the HRI: HCM Analyst (Organization View) Top profile for this responsibility at the responsibility or user level.

Organization-Based Security Example 1: Restricting Managers' Access to Their Departments

In Vision Corporation, C. Ray manages the Sales department and F. Lee manages the Finance department. You need to restrict the managers' access to their relevant departments. To set up the organization security, complete the following steps:

1. Assign the Department Manager responsibility to users: C. Ray and F. Lee.
2. Set the HRI: Line Manager (Organization View) Top profile option for C. Ray and F. Lee at the user level, selecting their respective organizations.

Organization-Based Security Example 2: Setting Up Organization Security for a Single User

A. Harris is the Human Resources Manager for Vision Corporation and needs to analyze workforce information. To enable him to complete the task:

1. Assign the Human Capital Management Analyst (Organization) responsibility to A. Harris.

2. Set the profile option HRI: HCM Analyst (Organization View) Top to Vision Corporation at the user level for A. Harris.

Organization-Based Security Example 3: Setting Up Organization Security for Multiple Users

In addition, to A. Harris, B. Brown (Benefits Manager), and C. Smith (Payroll Manager), need to access records in the Vision Corporation. To enable these managers to access Vision Corporation:

1. Assign the Human Capital Management Analyst by Organization responsibility to the users.

2. Set the profile option HRI: HCM Analyst (Organization View) Top to Vision Corporation at the responsibility level.

Implementation Tasks

Perform the implementation steps that are discussed in this section to use Fusion Human Resources Intelligence.

Enable Reports (Subject Areas)

Enable the following Fusion Human Resources Intelligence reports for workforce analysis:

- Absence Analysis Subject Area (HRI_ABSENCE_SUBJECTAREA)

- Recruitment Analysis Subject Area (HRI_RECRUITMENT_SUBJECTAREA)

- Workforce Activity and Deployment Subject Area (HRI_WORKFORCE_SUBJECTAREA)

Enable reports by using the Daily Business Intelligence Administrator responsibility, Administer Content page: Global, Administer Content. Query for Report and select the Human Resources functional area.

See: *Oracle Daily Business Intelligence Implementation Guide*, "Set Up Daily Business Intelligence," Enable Dashboards and Reports.

Set Up Users

Set up users and assign appropriate responsibilities to enable them to use Fusion

Human Resources Intelligence.

Fusion Human Resources Intelligence delivers the following responsibilities:

- Responsibilities to view information by Manager hierarchy:
  - Line Manager
  - Human Capital Management Analyst (Manager)
- Responsibilities to view information by Organization hierarchy:
  - Department Manager
  - Human Capital Management Analyst (Organization)

When you set up users, you can also control the data that they can access by using system profile options delivered in Fusion Human Resources Intelligence.

An analysis of your working practices will help you decide how to set up users and assign Fusion Human Resources Intelligence responsibilities and profiles based on the roles in your enterprise.

Set up users by using the System Administrator responsibility, Users window: Security, User, Define.

See: *Oracle Daily Business Intelligence Implementation Guide,* "Set Up Daily Business Intelligence," Set Up Users.

See: *Fusion Intelligence For E-Business Suite Implementation Guide,* "Fusion Human Resources Intelligence," Securing Data.

Define Profile Options

Define profile options to ensure system profiles relevant to Fusion Human Resources Intelligence are correctly set up to meet the requirements of your enterprise.

Define profile options by using the System Administrator responsibility, System Profile values window: Profile, System.

See: *Fusion Intelligence For E-Business Suite Implementation Guide,* "Fusion Human Resources Intelligence," System Profiles.

Configure Workforce Calculations

Configure workforce calculations for Fusion Human Resources Intelligence reports.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Implementing Daily Business Intelligence for HRMS," for information on configuring workforce calculations.

Set Period of Service Calculation Start Date

To calculate the employee period of service, set the HRI: Period of Service/Placement Date Start Source profile option.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Implementing Daily Business Intelligence for HRMS," for information on setting period of service calculation start date.

Set Up the Job Hierarchy

Set up the job hierarchy for your organization to view salary details.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Setting Up the Job Hierarchy.

Set Up Length of Work Bands

To report on employee period of service, set up the length of work bands.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Setting Up the Length of Work Bands.

Set Up Period of Placement Bands

To report on the contingent worker period of placement, set up the period of placement bands.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Setting Up the Period of Placement Bands.

Set Up Performance Rating Bands

To report on employee performance, set up the performance bands.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Setting Up Performance Bands.

Set Up Geography Dimension

To enable managers to view data across different areas, countries, regions, and cities, set up the geography dimension.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Setting Up Area Geography Dimension.

Define Separation Categories

Define the HR_MOVE_TYPE formula to identify separation categories.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Defining Separation Categories.

Categorize Workers

Create the HRI_MAP_WORKER_TYPE formula to specify which person types you want to report on.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Categorizing Workers.

Identify Promotion Criteria

Create the HRI_MAP_PROMOTION_EVENT user defined FastFormula to identify the promotion criteria.

- If you are using the PROMOTION formula, then you need not define the HRI_MAP_PROMOTION_EVENT formula.
- If you have not defined the PROMOTION formula and the HRI_MAP_PROMOTION_EVENT formula, then Fusion Human Resources Intelligence automatically uses grade changes to collect promotion metrics.

Create the formula using the Oracle Super HRMS Manager responsibility, Formula window: Total Compensation Basic, Write Formulas.

See Setting Up the Promotion Formula, page 6-21.

Identify Recruitment Events

Create the HRI_MAP_REC_APPL_STATUS user defined FastFormula for Fusion Human Resources Intelligence to identify recruitment stages and events in your enterprise.

Create the formula using the Oracle Super HRMS Manager responsibility, Formula window: Total Compensation Basic, Write Formulas.

See Setting Up the Recruitment Status Formula, page 6-22.

Categorize Application Termination Reasons

Create the HRI_MAP_REC_APPL_TERM_TYPE user-defined FastFormula to categorize application termination reasons into voluntary and involuntary.

Create the formula using the Oracle Super HRMS Manager responsibility, Formula window: Total Compensation Basic, Write Formulas.

See Creating the Application Termination Reasons Formula, page 6-24.

Ensure Formulas are Compiled

If you are using these formulas, ensure that they are compiled:

- HR_MOVE_TYPE_TEMPLATE
- TEMPLATE_BIS_DAYS_TO_HOURS
- TEMPLATE_FTE
- TEMPLATE_HEAD
- BIS_DAYS_TO_HOURS
- BUDGET_FTE
- BUDGET_HEAD
- GLOBAL_BUDGET_FTE
- GLOBAL_BUDGET_HEAD
- HRI_MAP_WORKER_TYPE
- HR_MOVE_TYPE
- NORMALIZE_APPRAISAL_RATING
- NORMALIZE_REVIEW_RATING
- HRI_MAP_PROMOTION_EVENTS
- HRI_MAP_REC_APPL_STATUS
- HRI_MAP_REC_APPL_TERM_TYPE
- PROMOTION_USER_DEFN_FAST_FORMULA

Compile the formulas using the Oracle Super HRMS Manager responsibility, Formula window: Total Compensation Basic, Write Formulas.

See: *Oracle HRMS FastFormula User Guide,* "FastForward," Writing or Editing a Formula, which is available on the Oracle Applications Online Documentation CD.

Enable the Payroll Events Model

To maintain summary data efficiently, Fusion Human Resources Intelligence requires a method of detecting changes that are made in Oracle Human Resources. The Payroll Events Model (dynamic trigger mechanism) can limit data refreshes to new or changed records in Oracle Human Resources since the last refresh.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Enabling the Payroll Events Model.

Manage Multi-threading

If your system uses multi-processor machines, there are two profile options that you can use to manage multi-threading.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Managing Multi-Threading.

Populate the Time Dimension

If you have not already populated the Time dimension as part of implementing another intelligence product's request set, you must now populate the dimension.

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Populating the Time Dimension.

Diagnose Your System and Data Setup Optional Step

Oracle recommends that you run the diagnostics reports to ensure that both your HRMS system and your data are set up correctly for Fusion Human Resources Intelligence reporting. These diagnostics speed up and simplify the implementation process.

Diagnose your system and data setup using the Daily Business Intelligence Administrator responsibility, Submit Request window: Data Summarization: Request Sets, Run Request Sets.

Use the Functional Area Parameter to restrict the following diagnostics to Fusion Human Resources Intelligence functional area only:

- Workforce Activity And Deployment
- Recruitment Analysis
- Absence Analysis

See: *Oracle Daily Business Intelligence for HRMS Implementation Guide,* "Deploy DBI for HRMS," Running the Diagnostics Setup Reports.

Generate Request Sets

Fusion Human Resources Intelligence reports are based on data held in base summary tables. You populate these structures using programs that are organized into request sets. Generate request sets using the Daily Business Intelligence Administrator responsibility, Generate Request Set page: Data Summarization: Request Sets, Administer Request Sets.

You must select all of the following subject areas mapped as reports to generate Fusion Human Resources Intelligence request sets:

- Workforce Activity and Deployment Subject Area (HRI_WORKFORCE_SUBJECTAREA).
- Recruitment Analysis Subject Area (HRI_RECRUITMENT_SUBJECTAREA).
- Absence Analysis Subject Area (HRI_ABSENCE_SUBJECTAREA).

> **Note:** If you implemented DBI for HR, you must also add all of the DBI for HR dashboards when you generate request sets for Fusion Human Resources Intelligence.

See: *Oracle Daily Business Intelligence Implementation Guide,* "Set Up Daily Business Intelligence," Run Initial Request Sets.

Populate Base Summary Tables

You need to run the Fusion Human Resources Intelligence request set to load data for reports.

Populate the base summary tables using the Daily Business Intelligence Administrator responsibility, Submit Request window: Data Summarization: Request Sets, Run Request Sets.

System Profiles

Use the System Administrator responsibility to check system profiles.

Before you run the Fusion Human Resources Intelligence reports, check that the relevant system profiles are set up to suit your enterprise.

To check the system profiles for Fusion Human Resources Intelligence reports:

- Use the System Profile Values window.
- In the Find System Profile Values window, find each of the following system profiles:

System Profiles

Profile Name	Description	Default Value	Configurable Levels
HRI: Use Recruitment Managers from Vacancy Form	Set this profile option to Yes, if you use Oracle HRMS for recruitment purposes. This profile option enables Fusion Human Resources Intelligence to use the person defined in the Recruiter or the Raised By field of the Requisition and Vacancy window as a recruitment manager to collect recruitment data. If you use iRecruitment, then set this profile option to No.	Yes	Site
HRI: Collect Headcount Values	Set this profile option to Yes if you want to use headcount measure to collect workforce values.	Yes	Site
HRI: Collect FTE Values	Set this profile option to Yes if you want to use FTE measures to collect workforce values.	Yes	Site
HRI: Populate Organization Hierarchy Events Queue	Define whether Fusion Human Resources Intelligence populates the incremental update queue for the organization hierarchy events. The default value is Yes. DBI and Fusion Human Resources Intelligence customers must not set this profile option to No.	Yes	Site
HRI: Implement OBIEE	Indicate whether Fusion Human Resources Intelligence has been installed.	Yes	Site

Profile Name	Description	Default Value	Configurable Levels
HRI: Implement DBI	Indicate whether DBI has been installed.	Yes	Site
HR: BIS Reporting Hierarchy	Select the organization hierarchy for Fusion Human Resources Intelligence to collect data on workforce measures. If you do not select the organization hierarchy, then Fusion Human Resources Intelligence uses the primary global organization hierarchy as the default hierarchy. **Note:** The organization hierarchy that you set for this profile option defines the list of organizations that you can select for the following profiles: HRI: Line Manager (Organization View) Top HRI: HCM Analyst (Organization View) Top		Site, Responsibility
HRI: Line Manager (Organization View) Top	Select the organization that line managers can access to view Fusion Human Resources Intelligence data. You can set this profile option only for the Department Manager responsibility. See Securing Data, page 6-8.		User

Profile Name	Description	Default Value	Configurable Levels
HRI: HCM Analyst (Organization View) Top	Identify the organization that Fusion Human Resources Intelligence users can access to view reports. You can set this profile option only for the Human Capital Management Analyst (Organization) responsibility. When you set this profile option to a specific user, the recipient can log in to view the organization hierarchy data. You can set this profile option at the responsibility level to enable multiple users to access data of a specific organization hierarchy.		Responsibility, User
HRI: HCM Analyst (Manager View) Top	Identify the manager hierarchy that users can access to view Fusion Human Resources Intelligence reports. Set this profile to enable users to view other managers' reports. For example, Vincent Price (deputy sales manager) needs to view dashboard and reports as Nick Right (chief sales manager). You set the profile option value for Vincent Price to Nick Wright at the user level. If you want to set this profile option at the responsibility level, ensure that you set the profile for the Human Capital Management Analyst (Manager) responsibility.		Responsibility, User

Additional Setup Tasks

Following are additional setup tasks.

Setting Up the Promotion Formula

Create the HRI_MAP_PROMOTION_EVENT user defined FastFormula to identify the criteria for promotion. When a change in job, position, or grade occurs for an employee, this formula determines if the change should be termed as a promotion. Fusion Human Resources Intelligence uses this formula to collect promotion information.

To set up the promotion formula:

1. For the Set Up business group, use your local HR Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Enter HRI_MAP_PROMOTION_EVENT as the formula's name.
4. Select QuickPaint as formula type.
5. Click the Edit button to open a blank Edit Formula window.
6. Use the following sample formula as a guide. Evaluate each promotion to decide whether you want to include the promotion in the Fusion Human Resources Intelligence promotion reports.

HRI_MAP_PROMOTION_EVENT Sample Formula

```
INPUTS ARE
job_new, (text)
job_old  (text),
grade_new  (text),
grade_old  (text),
position_new  (text),
position_old  (text)
DEFAULT FOR job_new       IS 'Unassigned'
DEFAULT FOR job_old       IS 'Unassigned'
DEFAULT FOR grade_new     IS 'Unassigned'
DEFAULT FOR grade_old     IS 'Unassigned'
DEFAULT FOR position_new  IS 'Unassigned'
DEFAULT FOR position_old  IS 'Unassigned'
promotion_code = 'N'
IF ((job_new <> job_old) OR
(grade_new <> grade_old) OR
(position_new <> position_old))
THEN (promotion_code = 'Y')
RETURN promotion_code
```

When you finish writing the formula, click the Verify button to compile it.

When the formula is verified successfully, save it.

Information About the Promotion FastFormula

The PROMOTION formula determines whether or not an employee has received a promotion using the assignment change reason.

To create the PROMOTION formula, you must copy the systems default promotions functionality from the PROMOTION_TEMPLATE formula and configure it accordingly.

To use different criteria for promotion, add the required codes in the EMP_ASSIGN_REASON look up type. For example, you can add change reasons such as HQ Move, Position Change as criteria for promotion so that the formula records a promotion when there is a change reason of Promotion, HQ Move, or Position Change.

The formula returns a count of 1 if a promotion occurs according to the rules, and a count of 0 if there is no promotion.

Setting Up the Recruitment Status Formula

Create the HRI_MAP_REC_APPL_STATUS user defined FastFormula for Fusion Human Resources Intelligence to identify recruitment stages and events in your enterprise. A recruitment stage defines a part of the recruitment process and can consist of one or more recruitment events. For example, an assessment stage can include events such as first interview, second interview, and background check.

This formula maps applicant assignment statuses with recruitment event lookup codes to determine recruitment events. Fusion Human Resources Intelligence uses this formula to collect data on recruitment events. For example, you can report on:

- The numbers of applicants in the background check status.
- The number of interviews, offers, and hires that occurred in a selected period.

> **Note:** Before you set up the recruitment user defined FastFormula, add the recruitment events that you want Fusion Human Resources Intelligence to report on as lookup codes to the HRI_REC_PIPLN_EVENTS lookup type. For example, to report on metrics related to third interview, add this event as a lookup code.

See: *Oracle HRMS Configuring, Reporting, and System Administration Guide,* "Extending Oracle HRMS," User and Extensible Lookups, which is available on the Oracle Applications Online Documentation CD.

To set up the recruitment status formula:

1. For the Set Up business group, use your local HR Manager responsibility to navigate to the Formula window.

2. Set your effective date to the date when you want to begin using the formula.
3. Enter HRI_MAP_REC_APPL_STATUS as the formula's name.
4. Select QuickPaint as formula type.
5. Click the Edit button to open a blank Edit Formula window.
6. Use the following sample formula as a guide. Evaluate each stage of the applicant to decide whether you want to include it in the Fusion Human Resources Intelligence recruitment reports.

HRI_MAP_REC_APPL_STATUS Sample Formula

```
INPUTS ARE
system_asg_status  (text),
user_asg_status    (text)
DEFAULT FOR system_asg_status IS 'NA_EDW'
DEFAULT FOR user_asg_status   IS 'Unassigned'
skip_event = 'N'
stage_code = 'NON_PIPLN_STG'
event_code = 'NA_EDW'
event_seq  = -1
IF system_asg_status = 'ACTIVE_APL' AND
user_asg_status = 'Background Check'
THEN (
stage_code = 'NON_PIPLN_STG'
event_code = 'USER_EVT1'
  event_seq  = -1
  skip_event = 'N'
)
ELSE IF system_asg_status = 'ACTIVE_APL' AND
      user_asg_status = 'Online Test'
THEN (
 stage_code = 'ASMT_STG'
  event_code = 'USER_EVT2'
  event_seq  = 310
 skip_event = 'N'
)
ELSE IF system_asg_status = 'INTERVIEW1'
THEN (skip_event = 'Y')
RETURN stage_code, event_code, event_seq, skip_event
```

Information About the Recruitment Status Formula

Stage_code represents values that are defined in the HRI_REC_PIPLN_STAGES lookup type.

Event_code represents values that are defined in the HRI_REC_PIPLN_EVENTS lookup type.

When you finish writing the formula, click the Verify button to compile it.

When the formula is verified successfully, save it.

Creating the Application Termination Reasons Formula

Create a user defined FastFormula HRI_MAP_REC_APPL_TERM_TYPE to enable Fusion Human Resources Intelligence to categorize application termination reasons into voluntary and involuntary categories. Application termination occurs when an applicant either voluntarily withdraws from the application process or is rejected as unsuitable. This formula enables you to report on the number of voluntary and involuntary application terminations.

To create the application termination formula:

1. For the Set Up business group, use your local HR Manager responsibility to navigate to the Formula window.
2. Set your effective date to the date when you want to begin using the formula.
3. Enter HRI_MAP_REC_APPL_TERM_TYPE as the formula's name.
4. Select the user defined FastFormula type.
5. Click the Edit button to open a blank Edit Formula window.
6. Use the following sample formula as a guide.
7. Evaluate termination reasons in the business group to decide whether you want to include the reasons in the Fusion Human Resources Intelligence recruitment reports.

HRI_MAP_REC_APPL_TERM_TYPE Sample Formula

```
INPUTS ARE termination_reason(text)
DEFAULT FOR termination_reason IS  'NA_EDW'
termination_type = 'I'
IF termination_reason = 'R' THEN
  termination_type = 'V'
IF termination_reason = 'D' THEN
  termination_type = 'I'
RETURN termination_type
```

When you finish writing the formula, click the Verify button to compile it.

When the formula is verified successfully, save it.

7

Fusion Marketing and Sales Intelligence

This chapter covers setting up the Fusion Marketing and Sales repository. For this release, no dashboards or reports are seeded or shipped.

This chapter covers the following topics:

- Prerequisites
- Understanding Fusion Marketing and Sales Intelligence
- Responsibilities
- Implementation Considerations
- Securing Data
- Customer Relationship Management KPIs and Reports
- Filters

Prerequisites

Before you implement the Fusion Marketing and Sales Intelligence For E-Business Suite application, you must implement:

- Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.
- Oracle Daily Business Intelligence for Sales, release 7.3.
- Oracle's E-Business Suite online transaction applications, release 11.5.10, that supply data to the DBI repository.

See: *Oracle Daily Business Intelligence Implementation Guide,* Daily Business Intelligence for Sales.

Review *About Fusion Intelligence For E-Business Suite, Family Pack H,* which is available on Oracle*MetaLink*, and ensure that all hardware and software prerequisites are complete.

Understanding Fusion Marketing and Sales Intelligence

The goal of Fusion Marketing and Sales Intelligence For E-Business Suite is to provide sales managers:

- Visibility into the pipeline of all active sales opportunities.

  Sales managers can track the value, percentage chance of closing, and expected close date.

- An understanding of past activities that produced results.

  Sales managers can analyze potential sales by sales group, product catalog, date, and currency.

- The ability to repeat past successes.

  Managers can view projected amount, probability of closing the sale, and weighted amount for each opportunity.

To accomplish this goal, sales managers need to track sales opportunities before they result in booked sales.

Please see Appendix A, page A-1 for a list of facts and dimensions that are contained in the Sales Intelligence Catalog.

Responsibilities

To access the Sales Intelligence subject area, log into the EBS application with the Sales Analysis responsibility.

Users who are assigned the Sales Analysis responsibility will automatically be assigned to the Sales Intelligence subject Area. For more information, see the Security chapter, Responsibilities section, page 3-3.

Implementation Considerations

This section discusses implementation considerations for Fusion Marketing and Sales Intelligence.

Users Migrating From DBI to OBIEE

Running the OBIEE initial request set over the DBI incremental request set may reset or change data. If you are migrating from DBI to OBIEE, we recommend that you run the OBIEE incremental request only.

The scenarios described below explain different kinds of users, and the reports (DBI and OBIEE) that they can view:

- If you do not use DBI and want to implement OBIEE: Run the OBIEE initial request set, followed by the OBIEE incremental request set.
- If you use DBI and want to implement OBIEE: You have already run the DBI incremental request set. Therefore, create and run the OBIEE incremental request set only.
- If you use DBI, want to implement OBIEE, and want to view DBI and OBIEE reports simultaneously: The DBI request set consists of the Opportunity Management, Sales Management, and Forecast Management dashboards. You must recreate the DBI request set by adding the Sales Analysis subject area (report) in addition to the three dashboards. To view DBI and BI reports simultaneously, users have to run the recreated DBI incremental request set only.

Profile Options

Profile options remain the same as profile options in Sales DBI.

Request Sets

Request sets, when run, display data at the report level. Use the following procedure to create a request set.

1. Log in with the Daily Business Administrator responsibility and navigate to Administer Request Sets, Request Sets page.
2. Click Generate Request Set.

   The Generate Request Set page appears.
3. Enter data in the Request Set Name and Internal Name fields.
4. Click Add Content.

   The Search and Select Content page appears.
5. In the Search region, select Report from the Search drop-down list and select Sales from the Functional Area drop-down list.
6. Click Go.
7. In the Results region, select the Sales Analysis Subject Area name and click Select.
8. Click Apply to save changes.

Securing Data

The Sales Group hierarchy determines the hierarchy of an organization's sales force. After authentication, users can view sales data rolled up to the Sales Group to which they belong. They can view data of assigned sales groups and subordinate sales groups. Users can drill in place into the sales group hierarchy to the fifth level.

Based on the sales group hierarchy setup in the Resource Manager, users can traverse the hierarchy to analyze the performance of subordinates. Access to peer data is not allowed by the security model. The default value is the sales group of the logged in user, whose role is 'Manager'. If there is more than one qualifying group, for the first login, the default sales group is the first sales group in the list. The default login for successive logins is the previous selected value.

> **Note:** Because the Sales group hierarchy has rolled up and non-rolled up data at any given level, building an answer starting at an arbitrary level other than Level1 can result in incorrect data. It is recommended to always build an answer starting at Level1 (which automatically brings in the logged-in level).

Customer Relationship Management KPIs and Reports

For this release, dashboards or reports are not seeded or shipped for Sales Intelligence, but the repository includes the data.

KPIs in This Release of Fusion Sales and Marketing Intelligence

- Won Opportunity
- Open Opportunity
- Lost Opportunity
- No Opportunity
- Win/Loss Ratio
- Pipeline
- Weighted Pipeline
- Sales Group Forecast
- Direct Reports Forecast

Reports

Reports that you can set up in this release are:

- Opportunity Win/Loss Report
- Opportunity Activity Report
- Forecast Overview Report
- Sales Group Forecast by Product Category Report
- Sales Opportunity Line Detail Report

Setting Up Reports

Use the following procedure to create reports:

1. Log in with the Sales Analysis responsibility.

   The Oracle Answers pane appears on the left-hand side.

2. Click Dimensions to add dimensions that you want displayed on the report.
3. Click Sales Group - Sales and select a sales group.
4. Click Time - Sales and select a relevant time period.
5. Click Facts and select a measure that you want displayed on the report.
6. Click Display Results.

See: *Oracle Business Intelligence Answers, Delivers, and Interactive Dashboards User Guide,* "Basics of Working with Requests in Oracle BI Answers."

Opportunity Win/Loss Report

To set up this report, you can select from the following measures:

- Total Opportunity
- Won
- Lost
- Open
- No Opportunity
- Won%

- Lost%
- Open%
- Win/Loss Ratio

Opportunity Activity Report

To set up this report, you can select from the following measures:

- Period Start Open
- Adjustments
- New for Period
- Won
- Lost
- No Opportunity
- Current Open

Forecast Overview Report

To set up this report, you can select from the following measures:

- Forecast
- Weighted Pipeline
- Pipeline
- Won

Sales Group Forecast by Product Category Report

To set up this report, you can select from the following measures:

- Product Category
- Sales Group Forecast
- Total Judgment
- Direct Reports Forecast
- Pipeline
- Weighted Pipeline

Sales Opportunity Line Detail Report

To set up this report, you can select from the following measures:

- Opportunity Name
- Opportunity Number
- Customer
- Forecast Owner
- Forecast Owner Sales Group
- Product Category
- Amount
- Win Probability
- Sales Stage
- Close Date
- Status

Administrators can make this report Drill Enabled so that users can navigate to the Oracle Sales transaction application. To do this, Administrators must select the HTML option/property.

Filters

When you view a report by Product Category, data is still filtered by the Sales Group in addition to the Product Category.

The Sales Group and Time dimensions drive data that is displayed in reports. For example, if you want to view data by Product Category, the driving factors are the Sales Group and Time dimensions. A report based on the Product Category and Time dimensions will not provide accurate results because Sales Group should be the driving factor.

Different dimensions to view data are:

- Sales Group and Time
- Sales Group, Product Category, and Time

Data is collected only for period ends, and therefore data does not appear for the Day Time Dimension. The Day in Time is used by the Sales Opportunity Line Details report, from which users can drill to the transaction application.

Users can select Sales Group Level1 as the starting level for the Sales Group and Product Category levels and can drill up to the fifth level. Users cannot drill beyond the fifth level.

The Change measure in the fact table in the Presentation layer is based on the YEARLY comparison. The change values therefore reflect changes as of the previous year.

8

Fusion Supply Chain and Order Management Intelligence

This chapter discusses the two dashboards used with Fusion Supply Chain and Order Management Intelligence: Manufacturing Analysis, and Order Booking and Fulfillment Analysis.

This chapter covers the following topics:

- Prerequisites
- Understanding Fusion Supply Chain and Order Management Intelligence
- Manufacturing Analysis Dashboard
- Order Booking and Fulfillment Analysis Dashboard
- Drill to Online Transaction System
- Guided Navigations
- Implementation Considerations
- Securing Data

Prerequisites

Before you implement the Fusion Supply Chain and Order Management Intelligence E-Business Suite application, you must implement:

- Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.
- Oracle Daily Business Intelligence for Supply Chain, release 7.3.
- Oracle's E-Business Suite online transaction applications, release 11.5.10, that supply data to the DBI repository.

See: *Oracle Daily Business Intelligence Implementation Guide,* "Daily Business Intelligence for Supply Chain."

Review *About Fusion Intelligence For E-Business Suite, Family Pack H,* which is available on Oracle*MetaLink*, and ensure that all hardware and software prerequisites are complete.

Understanding Fusion Supply Chain and Order Management Intelligence

The Fusion Supply Chain and Order Management Intelligence For E-Business Suite application delivers prebuilt dashboards with reports that provide an at-a-glance analysis of booking and fulfillment of orders, and manufacturing performance. This information helps managers keep track of key performance indicators such as booked value, fulfilled value, book to fulfill ratio, return value plan adherence, production value, and scrap percentage.

The Fusion Supply Chain and Order Management Intelligence For E-Business Suite application also contains metadata in the form of intelligence catalogs in the areas of order booking and fulfillment, manufacturing, inventory, product margin, and quality that maps primarily to DBI for Supply Chain in the Oracle DBI repository.

Please see Appendix A, page A-1 for a list of facts and dimensions that are contained in the intelligence catalogs.

Manufacturing Analysis Dashboard

The Manufacturing Analysis dashboard provides information about production volume, plan adherence, scrap, material usage variance, on-time production, production linearity, and current manufacturing performance such as production backlog, production delayed, and unrecognized variance. The dashboard enables users to monitor trends of plan adherence, production value, material usage variance, and scrap. The dashboard also provides users with the capability to drill in place to job level information.

The dashboard displays key performance indicators that pertain to the following:

- Production to plan % - (produced standard value (primary currency) ÷ planned standard value (primary currency)) × 100.

  The produced standard value is the total quantity of assembly completions, multiplied by the cost of the item when the baseline plan was collected. Planned standard value is the total quantity of the item on firm and planned orders, multiplied by the cost of the item when the baseline plan was collected.

- Production value - Net of the work-in-process completions value and work-in-process returns value into inventory.

- Scrap % - (scrap value ÷ gross production value) × 100.

  The scrap value is the value of scrap that is generated from all scrap transactions. It is the cost that is charged to an assembly that is scrapped. Gross production value is the cost of work-in-process completions into inventory, minus returns, plus scrap value.

This table lists the delivered Manufacturing Analysis dashboard pages, and the requests that are available on or accessible from each page:

Delivered Pages, Requests, and Prompts for Manufacturing Analysis Dashboard

Page	Requests	Prompts
Overview	Manufacturing KPIs PTP Detail Scrap Detail Guided Navigation Production to Plan Trend Production Value and Scrap % Trend Material Usage Variance Trend	Year Quarter Month Organization Item
Current Performance	Current Production Backlog Current Open Jobs Detail Current Production Delayed Current Late Jobs Detail Current Unrecognized Variance %	Inventory Organization Inventory Category Item
Manufacturing Summary	On-Time Production On-Time Jobs Detail Material Usage Variance Material Usage Variance Detail Production Linearity Average Job Size Produced	Year Quarter Month Inventory Organization Inventory Category Item

Order Booking and Fulfillment Analysis Dashboard

The order booking and fulfillment analysis dashboard provides information about order bookings, fulfillment, backlog, past due orders, customer returns, and late shipments. It provides users the capability to analyze past due orders with respect to schedule ship date and promise date. The dashboard enables users to monitor trends of book to fulfill days and customer returns. It provides information about the book to fulfill ratio of different organizations with the help of dial gauges. The dashboard also provides users the capability to drill in place to a real time view of sales orders.

The dashboard displays key performance indicators that pertain to the following:

- Booked value - Total value of all sales order lines booked within the selected time period (such as year, quarter, and month). Return lines are excluded from this KPI.

- Fulfilled value - Total value of all sales order lines fulfilled within the selected time period. Return lines are excluded from this KPI.

- Book-to-fulfill ratio (booked value ÷ fulfilled value) - Ratio between booked value and fulfilled value, which indicates if bookings are keeping pace with fulfillment.

- Return value - Total value of return lines from the customer within the selected time period.

This table lists the delivered Order Booking and Fulfillment Analysis dashboard pages, and the requests that are available on or accessible from each page:

Delivered Pages, Requests, and Prompts for Order Booking and Fulfillment Analysis Dashboard

Pages	Requests	Prompts
Overview	Order Booking and Fulfillment KPIs Guided Navigation Book to Fulfill Ratio Return Value Trend Book to Fulfill Days Trend Current Performance Fulfillment Summary	Year Quarter Month Organization Product Category Product Customer

Pages	Requests	Prompts
Current Performance	Top 10 Current Past Due Schedule Orders Top 10 Current Past Due Promise Orders Backlog and Past Due Current Past Due Detail	Organization Product Category Product Customer
Fulfillment Summary	Book to Fulfill Days Late Lines (Promise Date) Fulfillment Summary Fulfillment Performance Detail	Year Quarter Month Organization Product Category Product Customer

Drill to Online Transaction System

From dashboards and reports, you can drill in place from summary reports to more detailed reports, and from there to source transactions in the transaction processing application.

In Fusion Supply Chain Intelligence, you can drill from the Order Number column on the Fulfillment Performance Detail report and Current Past Due Detail report to the Sales Order View.

Guided Navigations

Guided navigations assist users in the exploration of results that appear on dashboard pages. The Fusion Supply Chain and Order Management Intelligence application delivers Guided Navigation sections that appear conditionally based on the results of certain key performance indicators (KPIs). When the system detects that one of these KPIs has reached its predefined threshold, a link appears in the Guided Navigation section to guide you to a summary report or dashboard page for further investigation.

This table lists the dashboard pages, alert names, threshold descriptions, and navigation target pages for the delivered guided navigations:

Delivered Guided Navigations

Dashboard Page	Threshold Description	Guided Navigation Target Page
Manufacturing Analysis Overview	Current production is delayed more than 5%	Current Performance dashboard page
Order Booking and Fulfillment Analysis Overview	Book-to-fulfill ratio is below 0.9	Fulfillment Summary

Implementation Considerations

This section discusses implementation considerations for Fusion Supply Chain and Order Management Intelligence.

Inventory Catalog - Transaction Source

The Transaction Source column of the Discrete: Inventory Transaction - OLTP Fact table will be populated only if the transaction source is one the following types:

- WIP Completion
- WIP Issue
- WIP Lot Bonus
- WIP Lot Merge
- WIP Lot Quantity Update
- WIP Lot Split
- WIP Return

Order Booking and Fulfillment Catalog - Drill-Enabled Column

You can use the Order Number (Drill Enabled) column in the Order Booking and Fulfillment catalog to implement the drill in place functionality on dashboards. However, you cannot use the Order Number (Drill Enabled) column to filter requests. Instead, to filter requests, use the Order Number column that is not drill enabled.

Securing Data

These responsibilities are set up as Oracle BI Server groups and Oracle Presentation Catalog groups, and delivered with the Fusion Supply Chain and Order Management Intelligence application:

- Supply Chain Manager (ISC_DBI_VP_OPS) - Use this group to access the Order Booking and Fulfillment Analysis and Manufacturing Analysis dashboards; Inventory, Manufacturing, Product Margin, and Order Booking and Fulfillment catalogs.

- Quality Intelligence (ISC_QT_DBIEE_QUALITY) - Use this group to access the Quality catalog.

Fusion Supply Chain and Order Management dashboards and catalogs are secured by the Inventory Organization dimension.

The Quality catalog has role-based security based only on the responsibility Quality Intelligence. As quality analysis normally requires a broad set of business-wide data, this role has access to manufacturing, customer returns, and procurement quality data from all organizations.

See: *Oracle Daily Business Intelligence Implementation Guide,* "Preface," Introduction Securing Data.

9

Fusion Procurement Intelligence

This chapter covers the Procurement Analysis dashboard.

This chapter covers the following topics:

- Prerequisites
- Understanding Fusion Procurement Intelligence
- Procurement Analysis Dashboard
- Drill to Online Transaction System
- Guided Navigation
- Implementation Considerations
- Securing Data

Prerequisites

Before you implement the Fusion Procurement Intelligence For E-Business Suite application, you must implement:

- Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.
- Oracle Daily Business Intelligence for Procurement, release 7.3.
- Oracle's E-Business Suite online transaction applications, release 11.5.10, that supply data to the DBI repository.

See: *Oracle Daily Business Intelligence Implementation Guide,* "Daily Business Intelligence for Procurement."

Review *About Fusion Intelligence For E-Business Suite, Family Pack H,* which is available on Oracle*MetaLink*, and ensure that all hardware and software prerequisites are complete.

Understanding Fusion Procurement Intelligence

The Fusion Procurement Intelligence For E-Business Suite application delivers one prebuilt dashboard with reports that provide an at-a-glance analysis of contract utilization rates, PO purchases, receipt date exception trends, and KPIs for measuring procurement performance. This information helps managers keep track of how effectively the procurement process is running.

The Fusion Procurement Intelligence For E-Business Suite application also contains metadata in the form of an intelligence catalog called the Procurement catalog that maps to requisitions, purchases, receipts, and spend facts in the Oracle DBI repository.

Please see Appendix A, page A-1 for a list of facts and dimensions that are contained in the Procurement catalog.

Procurement Analysis Dashboard

The Procurement Analysis dashboard and reports enable you to monitor trends of purchase order amounts, contact utilization rates, and receipt date exception rates. The Procurement Analysis dashboard also provides you with the capability to drill in place to a real time view of purchase orders.

The dashboard displays key performance indicators that pertain to the following:

- PO purchases amount - Total PO purchases amount, in the selected time period.
- Contract purchases rate - Rate of contract purchases amount to total PO purchases amount, in the selected time period.
- Non-contract purchases rate - Rate of non-contract purchase amounts to total PO purchase amounts, in the selected time period.
- Contract leakage rate - Rate of contract leakage amount to total PO purchases amount, in the selected time period.
- Price savings amount - Sum of [PO quantity x (PO price - benchmark price)] x (-1), in the selected time period.

> **Note:** The benchmark price is the average unit price on the purchase order for the same item in the previous enterprise year for all suppliers in the same operating unit in which the purchase took place. If the item was not purchased in the previous enterprise year, the system uses the average unit price in this enterprise year

This table lists the delivered Procurement Analysis dashboard pages, and the reports and prompts that are available on or accessible from each page:

Delivered Pages, Requests, and Prompts for Procurement Analysis Dashboard

Dashboard Page	Requests	Prompts
Overview (in primary currency)	Procurement KPIs Guided Navigation Contract Utilization Rates Trend PO Purchases Amount Trend Receipt Date Exception Rates Trend Contract Utilization Price Savings by PO Number	Year Quarter Month Operating Unit Commodity Supplier Supplier Site Buyer PO Category PO Item
Current Performance (in functional currency)	PO Purchases Status Receipts Status PO Issued Not Received Detail Report PO Issued Not Invoiced Detail Report Received Not Invoiced Detail Report	Operating Unit Commodity Supplier Supplier Site Buyer PO Category PO Item

Dashboard Page	Requests	Prompts
Procurement Summary (in primary currency)	Contract Utilization Price Savings Receipt Date Exceptions Invoice Amount PO Purchases by PO Number Contract Purchases by PO Number Non-Contract Purchases by PO Number Contract Leakage by PO Number Price Savings by PO Number Exceptions Amount by Receipt Number PO Match Invoice Details	Year Quarter Month Operating Unit Commodity Supplier Supplier Site Buyer PO Category PO Item Organization (only for Exceptions Amount by Receipt Number request) Invoice Creator (only for PO Match Invoice Details request)

Drill to Online Transaction System

From dashboards and reports, you can drill in place from summary reports to more detailed reports, and from there to source transactions in the transaction processing application.

In Fusion Procurement Intelligence, you can drill from the PO Number column on the Price Savings by PO Number, PO Purchases by PO Number, Contract Purchases by PO Number, Non-Contract Purchases by PO Number, and Contract Leakage by PO Number detail reports to the iSupplier Portal's View Purchase Order page.

You can also drill from the Unused Contract Number column on the Contract Leakage by PO Number detail report to the iSupplier Portal's View Purchase Order page.

Guided Navigation

Guided navigations assist users in the exploration of results that appear on dashboard pages. The Fusion Procurement Intelligence dashboard delivers a Guided Navigation section that appears conditionally based on the results of a certain key performance indicators (KPI). When the system detects that the KPI has reached its predefined threshold, a link appears in the Guided Navigation section to guide you to a summary report or dashboard page for further investigation.

This table lists the dashboard page, threshold description, and navigation target page for the delivered Procurement Analysis guided navigation:

This is the delivered guided navigation for the Procurement Analysis Overview dashboard page:

- Threshold Description: Non-contract purchases rate is above 20%
- Guided Navigation Target Page: Contract Utilization dashboard page

Implementation Considerations

This section discusses implementation considerations for Fusion Procurement Intelligence.

Create Default Commodity Program

You must execute a new concurrent program called Create Default Commodity that calls a package to associate categories to a default commodity if the category belongs to a Purchasing category set and is not associated with any commodity. Additionally, the default commodity name can be controlled by updating the value of a seeded message called POA_DBI_DEFAULT_COMMODITY, which is accessible by the Application Developer responsibility. The message appears truncated if the message value is greater than thirty characters. This action is required for the grand totals to match across all views. The concurrent request is available from the Daily Business Intelligence Administrator responsibility, as a single request.

Procurement Catalog - Drill-Enabled Column

You can use the PO Number (Drill Enabled) column in the Procurement catalog to implement the drill in place functionality on dashboards. However, you cannot use the PO Number (Drill Enabled) column to filter requests. Instead, to filter requests, use the PO Number column that is not drill enabled.

Securing Data

The responsibility named Procurement Manager Administration Group (POA_DBI_VP_PROC) is set up as an Oracle BI Server group and Oracle Presentation Catalog group. These security groups are delivered with the Fusion Procurement Intelligence application.

The Fusion Procurement dashboard is secured by the Operating Unit.

See: *Oracle Daily Business Intelligence Implementation Guide,* "Preface," Introduction, Securing Data.

10

Fusion Service Intelligence

This chapter talks about the Customer Support Catalog, which you can use to create reports and dashboards.

This chapter covers the following topics:

- Prerequisites
- Understanding Fusion Service Intelligence
- Securing Data

Prerequisites

Before you implement the Fusion Service Intelligence For E-Business Suite application, you must implement:

- Oracle Business Intelligence Enterprise Edition, release 10.1.3.2.
- Oracle Daily Business Intelligence for Customer Support, release 7.3.
- Oracle's E-Business Suite online transaction applications, release 11.5.10, that supply data to the DBI repository.

See: *Oracle Daily Business Intelligence Implementation Guide,* "Daily Business Intelligence for Customer Support."

Review *About Fusion Intelligence For E-Business Suite, Family Pack H,* which is available on Oracle*MetaLink*, and ensure that all hardware and software prerequisites are complete.

Understanding Fusion Service Intelligence

Fusion Service Intelligence delivers the Customer Support Catalog that contains dimensions and facts that you can use to create service-related analytical reports and dashboards.

Please see Appendix A, page A-1 for a list of facts and dimensions that are contained in the Customer Support Catalog.

Securing Data

The BIV_DBI_CUST_SUPP_MGMT responsibility is set up as Oracle BI Server group and Oracle Presentation Catalog group, and delivered with the Fusion Service Intelligence application. Use this group to access the Customer Support Catalog.

A

Dimensions and Facts

This appendix lists the dimensions and facts that are delivered with Fusion Intelligence for E-Business Suite.

This appendix covers the following topics:

- Dimensions and Facts
- Customer Support Catalog
- Financial Statement Certifications
- Inventory Catalog
- Manufacturing Catalog
- Order Booking and Fulfillment Catalog
- Payables Operations Analysis
- Procurement Catalog
- Product Margin Catalog
- Profit and Loss Analysis
- Quality Catalog
- Receivables Operations Analysis
- Sales Intelligence
- Workforce Management (Manager)
- Workforce Management (Organization)

Dimensions and Facts

The dimensions and facts listed below are delivered with the Presentation catalogs in Fusion Intelligence For E-Business Suite.

Customer Support Catalog

Dimensions

- Time
- Item
- Service Request Status
- Service Request Severity
- Assignment Group
- Service Request Urgency
- Channel
- Service Customer
- Service Request Type
- Service Request Owner

Facts

- Service Request Current Backlog
- Service Request Activity
- Service Request Resolution
- Service Request Closure

Financial Statement Certifications

Dimensions

- Account Evaluation
- Account Evaluation Result
- Audit Engagement
- Audit Units
- Certification Result
- Certification Result - Organization

- Certification Status
- Certification Type
- Changes
- Changes Priorities
- Changes Status
- Control Type
- Controls
- Design Effectiveness
- Disclosure Control
- Evaluation Result - Control
- Evaluation Result - Process
- Evaluation Result - Risk
- Evaluation Summary
- Financial Certification
- Financial Certification Owner
- Financial Statement
- GL Periods
- Key Control
- Open Issue Owner
- Open Issue Phase
- Open Issue Priority
- Open Issue Reason
- Operating Effectiveness
- Organization Evaluation

- Period Time
- Process
- Process and Organization
- Process Category
- Risk Impact
- Risk Likelihood
- Risk Material
- Risks
- Significant Account
- Significant Process
- Standard Process
- Users - Certified By
- Users - Evaluated By

Facts

- Control Details
- Open Issue Details
- Organization Certification
- Organization Certification Details
- Organization Deficiency Detail
- Process Certification
- Process Certification Details
- Process Deficiency Details
- Process Details
- Risk Details
- Significant Account Evaluation Details

- Significant Account Summary

Inventory Catalog

Dimensions

- Time
- Item
- Inventory Organization
- Inventory Organization - Transfer From/To
- Supplier
- Inventory Transaction Type

Facts

- Inventory Activity
- COGS
- Inventory Balance
- Discrete: Inventory Transaction - OLTP
- Discrete: Current On-Hand Inventory - OLTP

Manufacturing Catalog

Dimensions

- Time
- Inventory Organization
- Item
- Job Status
- Resource

Facts

- Production to Plan
- Resource Utilization

- Job Cost and Variance
- Completed Job Material Usage
- Completed Job Resource Usage
- Current Unrecognized Variance
- Scrap
- Completed Job Detail
- Job Detail - OLTP
- Job Operation - OLTP
- Batch Detail - OLTP
- Batch Operation - OLTP

Order Booking and Fulfillment Catalog

Dimensions

- Time - Actual Shipment Date
- Time - Booked Date
- Time - Fulfilled Date
- Time - Promise Date
- Time - Request Date
- Time - Schedule Ship Date
- Inventory Organization
- Operating Unit
- Item
- Customer
- Order Line Status
- Order Source

- Order Type
- Line Category
- Return from Customer Reason
- Sales Channel

Facts

- Bookings and Backlog
- Shipments
- Order Fulfillment
- Scheduled Shipments
- Order Booking and Fulfillment
- Order Lines - OLTP
- COGS
- Accounts Receivables

Payables Operations Analysis

Dimensions

- Operating Unit
- Supplier
- Currency - Ledger
- Currency - Transactional
- Time - Transaction Date
- Time - Due Date
- Time - Payment Date
- Time - Hold Date
- Time - Release Date

Facts

- Invoice Activity
- Invoice Holds
- Invoice Payments
- Open Invoices
- Payment Schedules

Procurement Catalog

Dimensions

- Time
- Supplier
- Item
- Operating Unit
- Inventory Organization
- Buyer
- Requester
- Invoice Creator
- Return to Supplier Reason
- Rejection Reason
- Company
- Cost Center

Facts

- Procurement Status
- Procurement Performance
- Purchases
- Spend

- Price Savings
- Price Change
- Supplier Performance (Receipts)
- PO Shipments - OLTP

Product Margin Catalog

Dimensions

- Time
- Inventory Organization
- Item
- Customer

Facts

- Product Gross Margin
- Revenue
- COGS

Profit and Loss Analysis

Dimensions

- Company
- Cost Center
- Financial Category
- Ledger
- Customer - Bill To
- Sales Channel
- Item
- Operating Unit
- Time - GL Date

- Time - Booked Date
- Time - Transaction Date
- Currency - Ledger
- Currency - Transactional

Facts

- Expenses
- Expense Details
- Revenue
- Revenue Details
- Cost of Goods Sold
- Cost of Goods Sold Details
- Payables Expenses
- Receivables Revenue

Quality Catalog

Dimensions

- Time
- Item
- Customer
- Supplier
- Department
- Inventory Organization
- Operating Unit
- Buyer
- Return to Supplier Reason
- Rejection Reason

- Return from Customer Reason
- Collection Plan
- Nonconformance Source
- Nonconformance Status
- Nonconformance Type
- Disposition Action
- Disposition Status

Facts

- Procurement Returns and Rejections
- Customer Returns
- Manufacturing Scrap
- Collection Elements - OLTP
- User Defined Collection Elements - OLTP
- Collection Element Mapping - OLTP

Receivables Operations Analysis

Dimensions

- Operating Unit
- Customer - Bill To
- Collector
- Time - Transaction Filter Date
- Time - Transaction Date
- Time - Due Date
- Time - GL Date
- Time - Adjustment Date
- Time - Receipt Filter Date

- Time - Receipt Date
- Time - Application Date
- Currency - Ledger
- Currency - Transactional

Facts

- Open Receivables and Receipts Summary
- Billing Activity
- Payment Schedules
- Adjustments
- Receipts

Sales Intelligence

Dimensions

- Sales Group - Sales
- Time - Sales
- Sales Resource - Sales
- Product Category

Facts

- Sales Opportunity
- Sales Pipeline
- Sales Forecast
- Sales Opportunity Line Details

Workforce Management (Manager)

Dimensions

- Absence
- Application Termination Reason

- Candidate Referrer
- Currency - Conversion (Primary) Rates
- Currency - Transactional
- Geography
- Location - Previous
- Grade
- Grade - Previous
- Job
- Job - Previous
- Leaving Reason
- Manager
- Manager - Previous
- Manager Hierarchy
- Organization
- Organization - Previous
- Period of Placement Band
- Period of Service Band
- Performance Band
- Person
- Person Type
- Position
- Position - Previous
- Recruiter
- Recruitment Activity

- Recruitment Activity Authorizer
- Recruitment Event
- Recruitment Manager
- Recruitment Status Date
- Requisition and Vacancy
- Requisition Raised By
- Termination Category
- Time
- Workforce Event
- Vacancy Start Date
- Vacancy End Date

Facts

- Workforce FTE Measures
- Workforce FTE Transfer Measures
- Workforce FTE Transfer Detail Measures
- Workforce Headcount Measures
- Workforce Headcount Transfer Measures
- Workforce Headcount Transfer Detail Measures
- Workforce Salary Measures
- Absence Measures
- Vacancy Measures
- Recruitment Application Process Event
- Recruitment Application Process Status
- Recruitment Application Process Activity

Workforce Management (Organization)

Dimensions

- Absence
- Application Termination Reason
- Candidate Referrer
- Currency - Conversion (Primary) Rates
- Currency - Transactional
- Geography
- Location - Previous
- Grade
- Grade - Previous
- Job
- Job - Previous
- Leaving Reason
- Manager
- Manager - Previous
- Organization
- Organization - Previous
- Organization Hierarchy
- Period of Placement Band
- Period of Service Band
- Performance Band
- Person
- Person Type

- Position
- Position - Previous
- Recruiter
- Recruitment Activity
- Recruitment Activity Authorizer
- Recruitment Event
- Recruitment Manager
- Recruitment Status Date
- Requisition and Vacancy
- Requisition Raised By
- Termination Category
- Time
- Workforce Event
- Vacancy Start Date
- Vacancy End Date

Facts

- Workforce FTE Measures
- Workforce FTE Transfer Measures
- Workforce FTE Transfer Detail Measures
- Workforce Headcount Measures
- Workforce Headcount Transfer Measures
- Workforce Headcount Transfer Detail Measures
- Workforce Salary Measures
- Absence Measures
- Vacancy Measures

- Recruitment Application Process Event
- Recruitment Application Process Status
- Recruitment Application Process Activity

B

Request Sets

This appendix lists the subject areas in Fusion Intelligence For E-Business Suite for which you can create request sets.

This appendix covers the following topics:

- Steps to Generate Request Sets
- Generating Request Sets
- Data Loading Shared Data Sources

Steps to Generate Request Sets

Use the Daily Business Intelligence Administrator responsibility to generate request sets. To generate request sets:

1. Navigate to Data Summarization: Request Sets, Administer Request Sets, Generate Request Set, Add Content.

2. Search for report by functional area and select a subject area.

3. Choose Clear and Load All Summaries to create an initial load; choose Incremental Load to create an incremental load.

Generating Request Sets

To populate data on a dashboard, you must run request sets for the corresponding subject area. The following tables list the subject areas for which request sets can be created.

Fusion Financials Intelligence

Catalog	Report Name	Internal Name
Profit and Loss Analysis	Profit and Loss Analysis Subject Area	FII_GL_PL_ANALYSIS_SA
Profit and Loss Analysis	Profit and Loss Analysis Subject Area Details	FII_GL_PL_DETAILS_SA
Receivables Operations Analysis	Receivables Operations Analysis Subject Area	FII_AR_OPERATIONS_ANALYSIS_SA
Payables Operations Analysis	Payables Operations Analysis Subject Area	FII_AP_OPERATIONS_ANALYSIS_SA

Fusion Compliance Intelligence

Catalog	Report Name	Internal Name
Compliance	Financial Statement Certifications Subject Area	RCI_FIN_STMT_CERT_SUBJECT_AREA

Fusion Human Resources Intelligence

Catalog	Report Name	Internal Name
Workforce Management (Manager) Workforce Management (Organization)	Absence Analysis Subject Area	HRI_ABSENCE_SUBJECTAREA
Workforce Management (Manager) Workforce Management (Organization)	Recruitment Analysis Subject Area	HRI_RECRUITMENT_SUBJECTAREA
Workforce Management (Manager) Workforce Management (Organization)	Workforce Activity and Deployment Subject Area	HRI_WORKFORCE_SUBJECTAREA

Fusion Marketing and Sales Intelligence

Catalog	Report Name	Internal Name
Sales Intelligence	Sales Analysis Subject Area	BIL_OBI_SALES_SUBJECT_AREA

Fusion Supply Chain and Order Management Intelligence

Catalog	Report Name	Internal Name
Inventory Catalog	Inventory Subject Area	OPI_INVENTORY_SUBJECT_AREA

Catalog	Report Name	Internal Name
Manufacturing Catalog	Manufacturing Subject Area	OPI_MANUFACTURING_SUBJECT_AREA
Order Booking and Fulfillment Catalog	Order Booking and Fulfillment Analysis Subject Area	ISC_ORDER_MGMT_SUBJECT_AREA
Product Margin Catalog	Margin Subject Area	OPI_MARGIN_SUBJECT_AREA
Quality Catalog	Quality Subject Area	ISC_QT_QUALITY_SUBJECTAREA

Fusion Procurement Intelligence

Catalog	Report Name	Internal Name
Procurement Catalog	Procurement Subject Area	POA_PROCUREMENT_SUBJECT_AREA

Fusion Service Intelligence

Catalog	Report Name	Internal Name
Customer Support Catalog	Customer Support Subject Area	BIV_CS_SUBJECTAREA

- To populate data in Order Booking and Fulfillment Analysis dashboard, run the request set for the Order Booking and Fulfillment Catalog.
- To populate data in Manufacturing Analysis dashboard, run the request set for the Manufacturing Catalog.

Data Loading Shared Data Sources

If you generate a request set for a subject area for OBIEE, the load includes only data sources, such as fact tables and MVs, that are defined for that subject area. Many subject areas in OBIEE that share data sources and existing DBI reports, also share some of the same data sources. To avoid data mismatch due to refresh time differences, we recommend that you build a request set (initial and incremental) that includes all of the OBIEE subject areas that you need that share common data sources.

This table lists OBIEE subject areas and dependent subject areas that share common objects:

Subject Area	Dependent Subject Area (shared common objects)
Order Booking and Fulfillment Catalog	Inventory Catalog
Manufacturing Catalog	None
Product Margin Catalog	Order Booking and Fulfillment Catalog, Inventory Catalog
Quality Catalog	Procurement Catalog, Manufacturing Catalog, Order Booking and Fulfillment Catalog
Inventory Catalog	None
Procurement Catalog	None
Customer Support Catalog	None

If you also run DBI, include the corresponding DBI dashboards in the initial and incremental loads. To find out which entities share common data sources, you can view DBI object dependencies screen under the Daily Business Intelligence Administrator responsibility.

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