

Oracle Business Approvals for Managers

User Guide

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Overview

This chapter includes the following topics:

- About Oracle Business Approvals for Managers
- Product Licensing

About Oracle Business Approvals for Managers

Oracle Business Approvals for Managers (hereafter referred to as Managers) delivers targeted and task-oriented information to help managers make informed decisions and take action immediately and securely from their iPhones.

Managers enables you to evaluate, request more information, approve, or reject Oracle E-Business Suite (Oracle EBS) requests related to:

- Expense reports
- Human resources job offers
- Human resources vacancies
- Purchase order requisitions

In Managers, the requests are grouped together in separate worklists based on the type of request.

Optionally, you can set up Managers to retrieve custom reports related to the type of approval that you are reviewing. This configuration retrieves data from Oracle Business Intelligence Suite Enterprise Edition Plus (Oracle BI EE Plus) or Oracle Business Intelligence Applications.

The security and performance of the application are enhanced with the support of SSL encryption protocol and optionally Oracle's Identity Management.

Product Licensing

To download the application on the iPhone, you must agree to the terms of the Oracle Business Approvals for Managers license agreement. You can access the license agreement when you download the application.

Overview

In addition, Oracle Business Approvals for Managers requires the licensing of a server product called Oracle Business Approvals Connector for Managers. This connector provides secure and robust integration with Oracle EBS applications using Oracle SOA Suite and optional Oracle BI EE Plus technologies. Oracle Business Approvals Connector for Managers can be licensed directly from Oracle.

Setting Up Managers

This chapter includes the following topics:

- Prerequisites
- Configuring Managers Application Settings
- Configuring Access to Oracle BI EE Plus Analytics (Optional)

Prerequisites

Before you can configure Oracle Business Approvals for Managers, a system administrator must:

- Install the Oracle Business Approvals Connector for Managers.
- Configure the SOA Suite to interact with the application.

See the *Oracle Business Approvals Connector for Managers Configuration Guide* for instructions for these prerequisites.

Configuring Managers Application Settings

The application settings for Managers include BPEL settings, worklist type settings, and an option to enable debugging. In addition, you can specify the format and language of the Managers interface by modifying the iPhone's region and language settings. See "Setting Language Preferences" in this section for more information.

BPEL Settings for the Server

The BPEL settings include the endpoint URL to the server that provides the interaction with Oracle EBS and login credentials that you use to access Oracle EBS. The endpoint URL is a site specific location and should be provided by your system administrator.

Worklist Type Settings

Managers supports multiple worklist types, including Expense Reports, Purchase Requisitions, HR Offers, and HR Vacancies. You cannot access a worklist unless you have enabled one or more worklist types in the application settings. In

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addition, you can enable only the worklist types to which you have been given access by your system administrator.

Debug System Setting

When enabled, the Debug system setting provides detailed logging that you can use to troubleshoot connectivity or other issues. Oracle recommends that you disable the Debug setting when not troubleshooting the application.

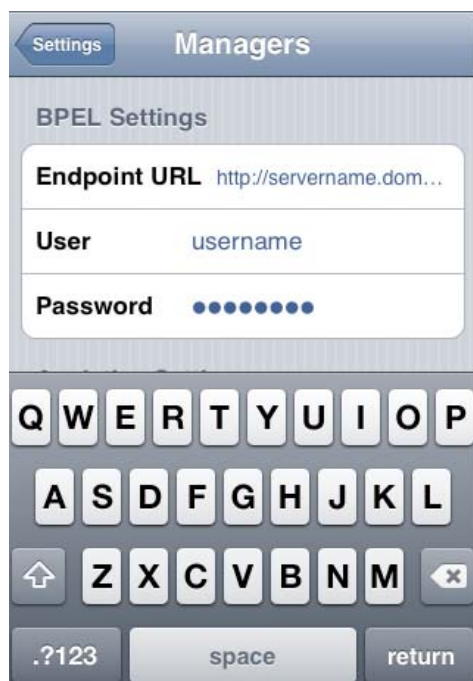
Note: The application settings also contain an Analytics Settings section. These settings are optional and enable users to access Oracle BI EE Plus analytic reports and view them directly from Managers. See “Configuring Access to Oracle BI EE Plus Analytics” in this guide for more information.

To configure Managers application settings:

1. On the iPhone, tap the Settings button.



2. On the Settings page, tap Managers.



3. In the BPEL Settings section, tap the Endpoint URL field and enter a URL in this format:

http://servername.domain.com:port/orabpel/domain

Note: If the access uses a secure sockets layer (SSL) protocol, then the URL will begin with https.

This table provides a description of each variable in the URL:

Variable	Description
servername.domain.com	The name of the server machine on which the web services are deployed. This may be a short name (servername), a fully qualified name (servername.domain.com), or an IP address (for example, 10.0.1.251).
port	The TCP/IP port on which the web services are listening. If the web services have been deployed on the default HTTP port 80 this may be omitted, as in this example: <i>http://server.domain.com/orabpel/domain</i> If HTTPS (SSL) is being used and the services have been deployed on the default HTTPS port 443 the URL will look like <i>https://server.domain.com/orabpel/domain.</i> Otherwise the URL will contain the port used, for example if the web services are using HTTPS listening on

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	port 8080, the URL would be <code>https://server.domain.com:8080/orabpel/domain</code>
domain	The name of the BPEL domain on which the web services are deployed. BPEL is configured with a default domain using the name "default," as in this example: <code>http://server.domain.com:port/orabpel/default</code> If the services were deployed to an alternate domain, use the name of that domain instead.

4. Enter your sign-on credentials in the following fields:

Field	Value
User	Enter the same user name that you use to access Oracle EBS.
Password	Enter the password associated with your user name.
Uses Single Sign-On	Slide to On to specify if single sign-on is enabled on the server. The default setting for this option is OFF.

5. Scroll down to the Worklist Types section.

The screenshot shows the 'Managers' settings page. At the top, there is a 'Settings' button and the title 'Managers'. Below this, there are several sections:

- Password:** A field with a masked password represented by seven dots.
- Uses Single Sign-On:** A toggle switch currently set to 'OFF'.
- Worklist Types:** A section containing four items, each with a toggle switch set to 'ON':
 - Expense Reports
 - Purchase Requisitions
 - HR Offers
 - HR Vacancies
- System:** A section containing one item with a toggle switch set to 'OFF':
 - Debug

6. In the Worklist Types section, for each worklist type that you wish to enable, slide the switch to ON.

You must select at least one worklist type for the application to function properly.

7. For the Debug setting, slide the switch to ON to enable logging.
By default, the Debug option is not enabled (OFF).

Setting Language Preferences

To fully utilize Managers for a given locale, it is recommended that you configure the region and language settings on your iPhone. Managers supports several region and language formats that are available on the iPhone. When you modify these settings, the Managers interface reflects the selected language, with the exception of data related items such as worklist items, reports, and so forth.

See the iPhone help for instructions on how to modify the region and language settings.

Important! The language format that you select on the iPhone must be supported in Oracle EBS. Refer to the language setting in your Oracle EBS environment. For more information, see the *Oracle Applications Installation Guide Using Rapid Install*.

In addition, if you chose the optional configuration to enable the viewing of reports in Managers, then the language format must be supported on the Oracle BI Server as well. Refer to the language setting in your Oracle BI Server environment. For more information, see the *Oracle Business Intelligence Server Administration Guide*.

Configuring Access to Oracle BI EE Plus Analytics (Optional)

This section includes an overview and the following topics:

- Considerations for Viewing Charts on the Mobile Device
- Setting Up Analytics in Oracle BI EE Plus for Managers
- Configuring Managers to Access Oracle BI Analytics
- Passing Context

Overview

The Analytics Settings in Managers enable access to analytic reports in Oracle BI EE Plus. In Oracle BI EE Plus, you can create a custom set of reports and associate them with a particular worklist in Managers.

Considerations for Viewing Charts on the Mobile Device

The iPhone device does not currently support Flash components in Web pages. To enable viewing charts on the mobile device, you must configure the Oracle BI Server to display charts using the PNG graphic format. The PNG format is a simple graphics format and does not support all the interactivity provided by the Flash or SVG formats.

To enable PNG rendering, add the following to the <ServerInstance> section of the instanceconfig.xml file:

```
<Charts>  
    <DefaultImageType>PNG</DefaultImageType>  
</Charts>
```

The instanceconfig.xml file is located in this directory:

```
\\DATADIR\web\config
```

In addition, Oracle recommends that you install and configure a second presentation server for serving content specifically to mobile devices so that PNG chart rendering applies only to mobile devices.

Setting Up Analytics in Oracle BI EE Plus for Managers

In the Oracle BI Web client, use Manage Catalog to associate new or existing analytic reports to a worklist type in Managers. You can place analytic reports in subfolders in either of these locations:

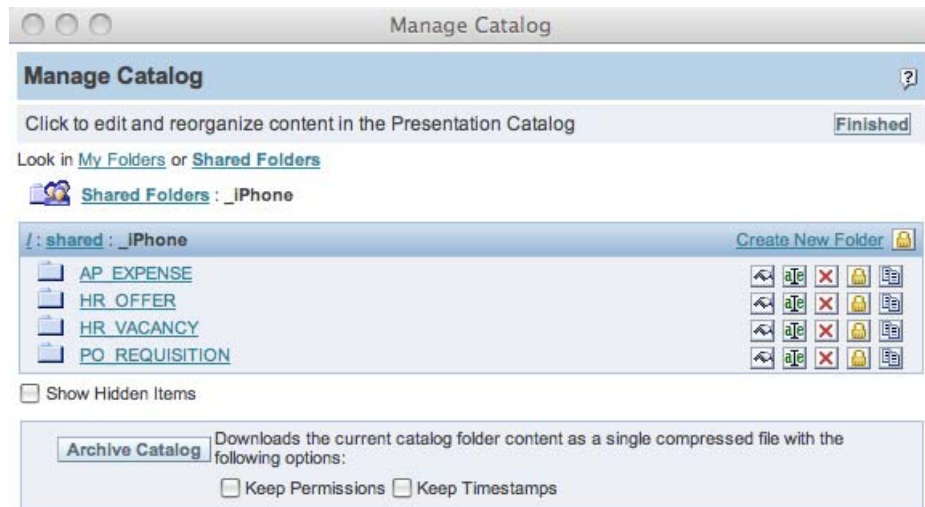
- My Folders – Contains analytic reports that only you can access.
- Shared Folders – Contains analytic reports that users with the appropriate permissions can access.

In My Folders or Shared Folders, create a new folder named _iPhone, and then create subfolders based on the approval type with which you want to associate analytic reports. The subfolders that you set up for Managers are case sensitive. The folder names are hard coded and must be named exactly as shown in this table:

Folder Name	Approval Type
AP_EXPENSE	Expense Reports
HR_OFFER	HR Job Offers
HR_VACANCY	HR Job Vacancies
PO_REQUISITION	Purchase Order Requisitions

Each analytic report placed in one of these subfolders appears as an available report in the Managers application on the iPhone. Any subfolders and items contained within them are not available in the Managers application; these items typically include saved reports or symbolic links to reports located elsewhere in the repository.

This is an example of the folder configuration in the Oracle BI Manage Catalog for Managers:



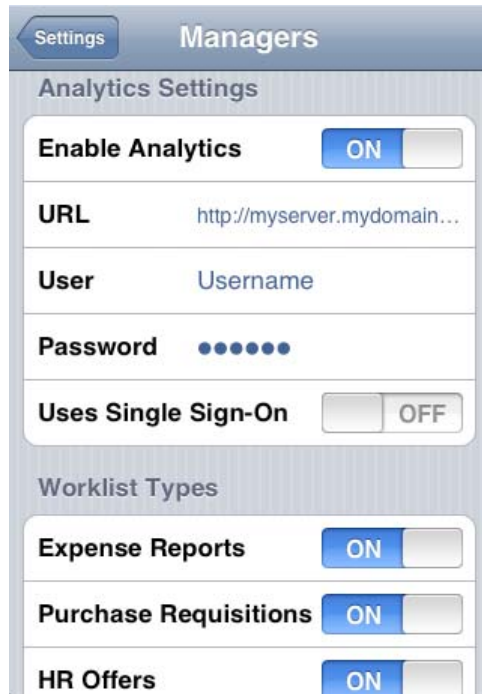
Oracle BI Manage Catalog – Folders for storing reports for Managers application

Configuring Managers to Access Oracle BI Analytics

On the iPhone, configure the Managers application settings to enable access to reports in Oracle BI EE Plus.

To configure Managers to access Oracle BI analytics:

1. On the iPhone, tap the Settings button.
2. On the Settings page, tap Managers.



3. In the Analytics Settings section, slide the Enable Analytics switch to ON.
4. Tap the Endpoint URL field and enter a URL to access the Oracle BI EE Plus server, as in this example:

`http://servername.domain.com:port/analytics`

Note: If the web services are accessed over a secure sockets layer (SSL) protocol, then the URL will begin with https.

This table provides a description for each variable in the URL:

Variable	Description
servername.domain.com	The name of the server machine on which the Oracle BI Server is running. This may be either a short name (servername), a fully qualified name (servername.domain.com), or an IP address (10.0.1.251).
port	The TCP/IP port on which the Oracle BI Server is listening. If the Oracle BI Server has been deployed on the default HTTP port 80 this may be omitted, as in this example: <code>http://server.domain.com/analytics</code> If HTTPS (SSL) is being used and the Oracle BI Server has been deployed on the default HTTPS port 443 the

	URL will look like: https://server.domain.com/analytics Otherwise the URL will contain the port used, for example if the Oracle BI Server is using HTTPS listening on port 8080 the url would be: https://server.domain.com:8080/analytics
--	---

5. Enter your sign-on credentials in the following fields:

Field	Value
User	Enter the same user name that you use to access the Oracle BI Server through the desktop.
Password	Enter the password associated with your Oracle BI Server user name.

Note: The user and password values might be case sensitive, so you must enter them exactly as you would when logging in through the browser client.

6. If the server uses Oracle Single Sign-On, then slide the Uses Single Sign-On switch to ON.

When enabled, the application uses Oracle SSO to authenticate the user.

Passing Context

Oracle Business Approvals for Managers supports passing context from the iPhone to the Oracle BI Server. Passing context provides more relevant analytics for the approval being viewed. Any of the header fields for an approval, as shown in this example, can be passed to the Oracle BI Server:



Worklist Details – Header Information

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Context passing works in a similar manner as presentation variables with some minor differences. When an analytic report is accessed, Managers performs the following tasks:

- Retrieves the report definition (XML) for the report.
- Iterates through each of the header fields of the approval being viewed. Each header field is identified with a key string. If the report contains one or more instances of the string `@{key}`, the actual value is substituted for this placeholder.

The modified report is submitted to the Oracle BI Server and the results are displayed on the mobile device.

An example of context passing and a list of available keys for each approval type is provided in “Appendix B: Additional Information about Context Passing” in this guide.

Using Managers

This chapter includes an overview and the following topics:

- Viewing Worklists
- Requesting More Information
- Approving Worklist Items
- Rejecting Worklist Items
- Viewing Related Analytic Reports (Optional)

Overview

The Managers application on the iPhone enables you to view, approve, or reject approval requests related to the following tasks in Oracle EBS:

- Expense reports
- Human resources vacancies
- Human resources job offers
- Purchase order requisitions

The Managers application stores and categorizes approval requests in worklists. The approval requests are also referred to as worklist items.

Managers provides addition information for each item awaiting approval in a worklist, including detail lines and any available historical information. If you need more information than is available to determine whether to approve or reject the worklist item, you can submit a request for more information from the person who submitted the item for approval.

In addition, when you approve or reject a worklist item, you can enter text to explain the reason for your decision.

Viewing Worklists

Managers enables you to sort worklists by:

- **Category**

By default, worklist items are grouped by worklist type or by category. The categories displayed depend on the worklist types that you enabled in the application settings. For example, if you enabled Expense Reports and Human Resources Job Offers, the Worklist page displays items awaiting your approval for these two categories.
- **Start Date**

You can change the display to view all worklist items by their start dates.
- **Due Date**

You can change the display to view all worklist items by their due dates.
- **Closed**

You can view worklist items that have been previously approved or rejected.

After you select an item in the worklist, Managers displays more information about the item, such as:

- **Details lines**

The details lines provide information about the items contained within the approval, for example for an expense report, the detail lines contain each item entered in the expense report.
- **History**

History provides information about the past activity of a worklist item, for example the timestamp and user name of the person who entered the approval and previous approvers, if any.
- **Related reports (if available)**

The reports provide related data displayed in charts or graphs to support the decision making process. See “Viewing Related Analytic Reports” in this guide for more information.

To view worklists:

1. On the iPhone, tap the Oracle Managers application icon.



By default, the Worklist page displays the items awaiting approval by category.

2. On Worklist, tap any of the following options at the bottom of the page to determine how the application displays pending worklist items:
 - Start Date
 - Due Date
 - Category
 - Closed
3. Tap the worklist item that you want to view.



4. In the Details section, tap any available menus to view additional details about the worklist item.



Example of detail lines

5. After reviewing the information, tap the button in the upper-left corner of the page to return to the worklist item.

Requesting More Information

To request more information about an item in a worklist:

1. On the Worklist page, tap the worklist item.
2. On the worklist header page, tap the Request More Info button.
3. Select the user from whom you wish to request more information.



4. Enter your comments and tap Done.



Managers sends the worklist item with your comments to the user's worklist.

Approving Worklist Items

To approve items in a worklist:

1. On the Worklist page, tap the worklist item.
2. On the worklist header page, tap the Approve button.



3. Tap Approve to approve the item.
4. If you want to add comments to the approval, tap Approve With Comments.

5. Enter your message and then tap OK to send the approval.

Managers sends an approval message to the source application and removes the item from the pending worklist.

Rejecting Worklist Items

To reject items in a worklist:

1. On the Worklist page, tap an item in the worklist.
2. On the worklist header page, tap the Reject button.
3. Tap Reject to reject the approval.



4. If you want to add a comment to the rejection, tap Reject With Comments.
5. Type your message and then tap OK to send the rejection.

Managers sends a rejection message to the source application and removes the item from the pending worklists.

Viewing Related Analytics (Optional)

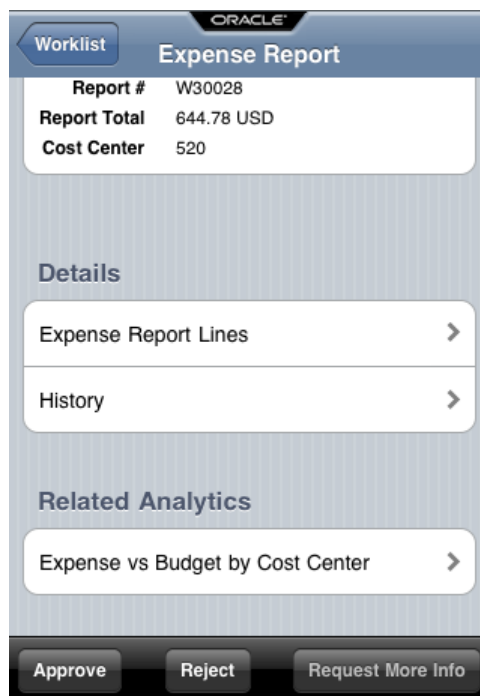
If you configured the Managers application settings to access analytic reports in Oracle BI EE Plus, you can view reports related to worklist items directly on the iPhone. The reports provide the business data you need to make an informed

decision. For example, before deciding whether or not to approve a purchase order requisition, you can access a report that displays the remaining budget for expenditures for the current period.

You can also forward reports to others. When you forward a report, Managers sends an e-mail that contains a link to the report that when clicked, launches the report in a Web browser. The recipient does not have to be a Managers user to view the report.

To view related analytics:

1. On the Worklist page, tap a worklist item.
2. On the worklist header page, scroll down to the Related Analytics section.



3. Tap the report that you want to view.



4. On the Results page, perform any of these operations to work with the report:

Double-tap the report to zoom in or zoom out of the data.

Turn the iPhone 90 degrees for a wider view of the data or chart.

Tap the Refresh button at the bottom of the screen to refresh the data.

Tap the Cancel button (X icon) to stop the loading of a report that is currently loading.

Tap the Forward button (pencil icon) to forward the report. See "To forward a report" for more information.

5. Tap the button in the upper-left corner of the page to return to the worklist header page.

To forward a report:

1. On the Results screen, tap the Forward Report button at the bottom of the screen.

The e-mail screen appears with a link to the report in the body of the e-mail.

Using Managers



2. In the To field, enter the e-mail addresses of the recipients.
3. Tap the subject or the body of the e-mail to enter any additional text.
4. Tap the Send button.

Appendix A: Troubleshooting

This chapter includes the following topic:

- Troubleshooting Configuration Issues

Troubleshooting Configuration Issues¶

This section details some common problems related to Managers and suggests possible solutions.

Symptom/Error - Missing BPEL Configuration

If you attempt to run the approval applications prior to configuring the BPEL Endpoint URL, you will receive the following message:



You will also receive this message if the endpoint URL is configured but the credentials are not configured.

Possible Solution

Access the Managers application settings and configure the BPEL endpoint URL and user credentials.

Symptom/Error - Worklist Types Not Selected¶

If you did not enable at least one worklist type, you will receive the following message:

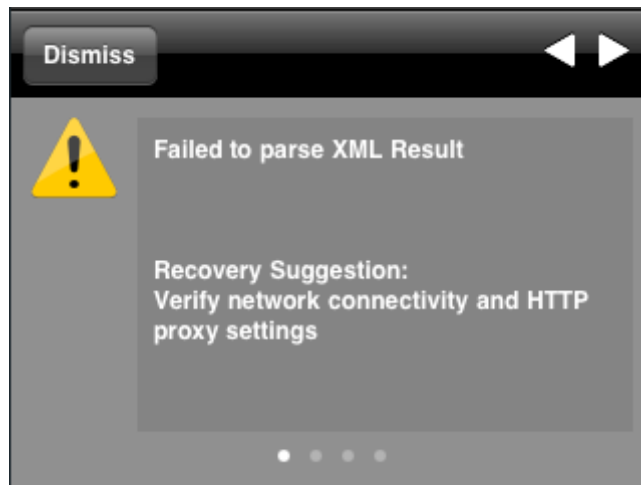


Possible Solution

Access the Managers application settings and enable at least one approval type.

Symptom/Error - Failed to Parse XML

The following "Failed to parse XML Result" error appears:



You receive this error once for each configured worklist type.

The application received some unexpected HTTP content from the configured URL. Verify that the endpoint URL is correct by performing these steps:

1. Launch Safari on the mobile device.
2. Enter the configured Endpoint URL into the address bar.
3. Verify that you receive a page containing the following content:



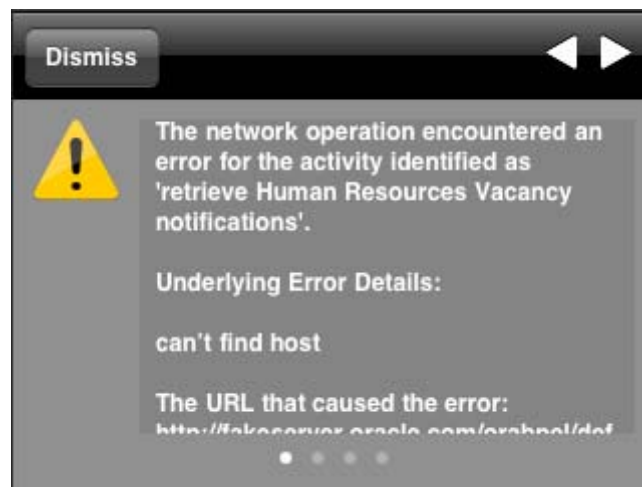
If you did not receive a page that contains this message – "No WebService Provider is registered at this URL," then the endpoint URL is not correct.

Possible Solution

In the Managers application settings, enter the correct endpoint URL for the BPEL server.

Symptom Error – Can't Find Host

An error appears that has an underlying cause "can't find host." You receive this error once for each configured worklist type:



The application was unable to resolve the configured host name in the BPEL endpoint URL, or the specified port was not valid. Verify the endpoint URL is correct by performing these steps:

1. Launch Safari on the mobile device.
2. In the address bar, enter the configured endpoint URL.
3. Verify you receive a page that contains this message: No WebService Provider is registered at this URL



Verifying Web Service

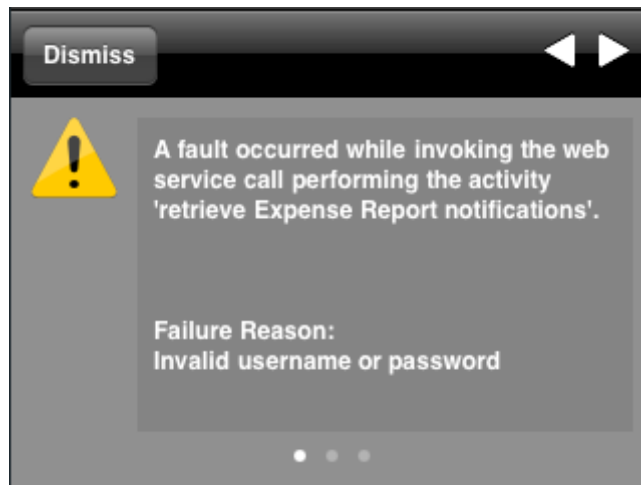
If you did not receive a page containing the text – “No Webservice Provider is registered at this URL,” the endpoint URL is not correct.

Possible Solution

In the application settings, enter the correct endpoint URL for the BPEL server.

Symptom/Error – Can’t Find Host

An error appears that has an underlying cause “invalid username or password:”



You receive this error once for each configured worklist type.

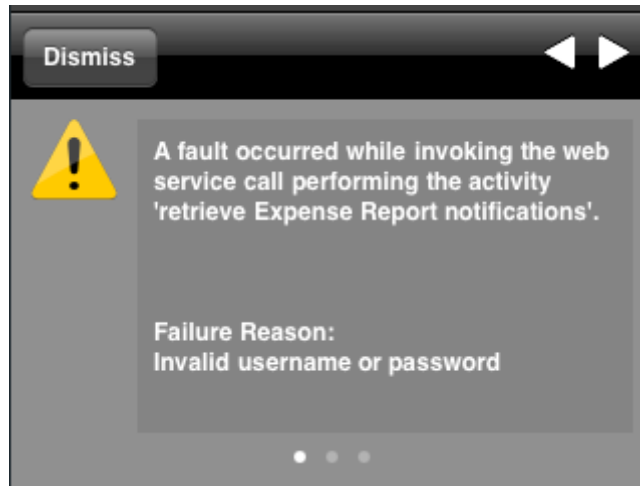
Possible Solution

In the Managers application settings, enter the proper credentials.

Symptom/Error

Invalid Domain

An error appears that has an underlying cause “ORABPEL-02052” and contains a message similar to “The BPEL domain ‘domainname’ cannot be found.”



Note: The error code and message may vary slightly. You receive an “Invalid Domain” error message once for each configured worklist type.

Possible Solution

The domain portion of the configured BPEL endpoint URL is not correct. In the application settings, enter the correct endpoint URL for the BPEL server.

Appendix B: Additional Information about Context Passing

This appendix includes the following topics:

- Example of Context Passing
- Header Variables for Context Passing

Example of Context Passing

The example in this section describes how to configure a report in Oracle BI Answers to use context passing from Managers. Context passing enables Managers to retrieve analytics from Oracle BI EE Plus based on the header field values of a particular worklist item, or approval request, in Managers.

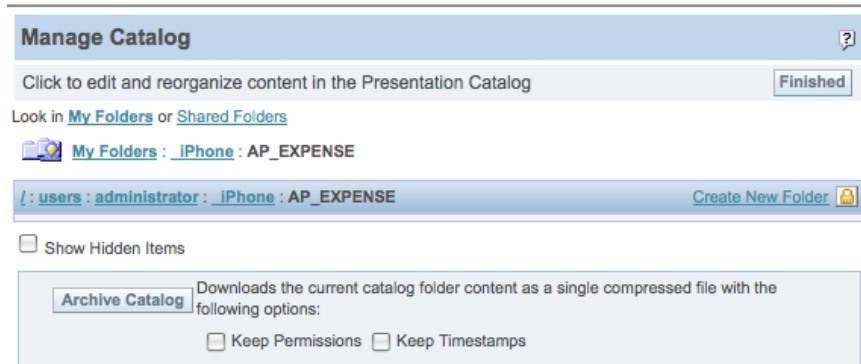
In this scenario, a Managers user wants to see a report that compares the values of the budget versus actual expenditures based on cost center. The worklist item contains a cost center field in the header. The example below describes how to configure context passing in Oracle BI Answers so that the analytic reports retrieves data based on the cost center information in the worklist item.

To configure context passing, the user would follow these steps:

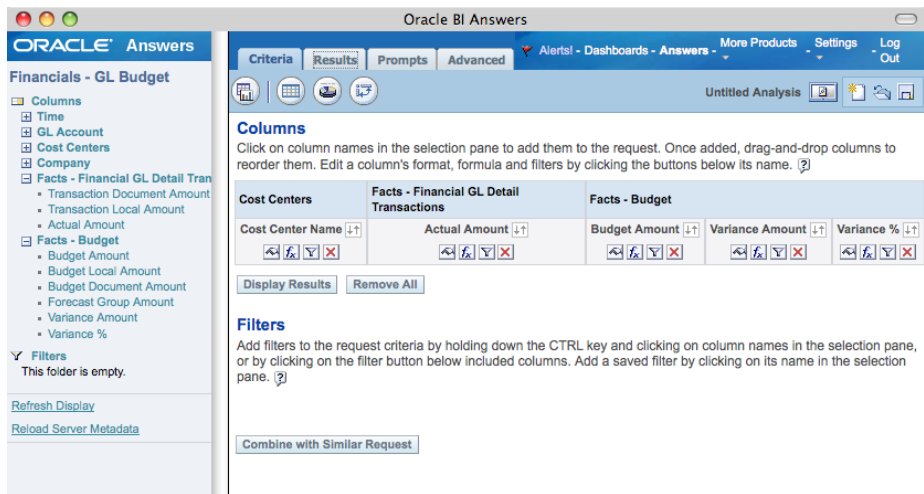
1. In Oracle BI Answers, create a report and save it in the proper folder in the repository, as described previously in the “Setting Up Analytics in Oracle BI EE Plus for Managers” section in this guide.

For expense reports, place the report in the AP_EXPENSE folder.

Appendix B: Additional Information about Context Passing



2. In Oracle BI Answers, create a report using the Financials - GL Budget subject area.



3. Add the Cost Center Name dimension and these facts:

Actual Amount
 Budget Amount
 Variance Amount
 Variance %

Appendix B: Additional Information about Context Passing

The screenshot shows the Oracle BI Answers interface with the 'Results' tab selected. A table is displayed with the following data:

Cost Center Name	Actual Amount	Budget Amount	Variance Amount	Variance %
Consulting	-16,774,848,952	-13,358,659,416	-3,416,189,536	20
Manufacturing Management	-1,339,752,580	22,361,974	-1,362,114,554	102
Marketing	9,838,743,505	13,216,686,126	-3,377,942,621	-34
Materials Management	18,934,322,877	310,146,968	18,624,175,909	98
Planning	266,489,145	-476,515,638	743,004,783	279
Production Control	3,080,552,285	3,271,965,516	-191,413,231	-6
Revenue Administration	-5,899,920,315	-4,590,631,869	-1,309,288,446	22
Sales Management	897,547,000	-3,376,809,644	4,274,356,644	476
Support	-15,039,810,787	6,787,781,762	-21,827,592,549	145
Training	38,495,744,671	19,809,785,773	18,685,958,898	49

- Click the Results tab to look at the data.

The screenshot shows the Oracle BI Answers interface with the 'Criteria' tab selected. A 'Create/Edit Filter' dialog box is open, showing the following configuration:

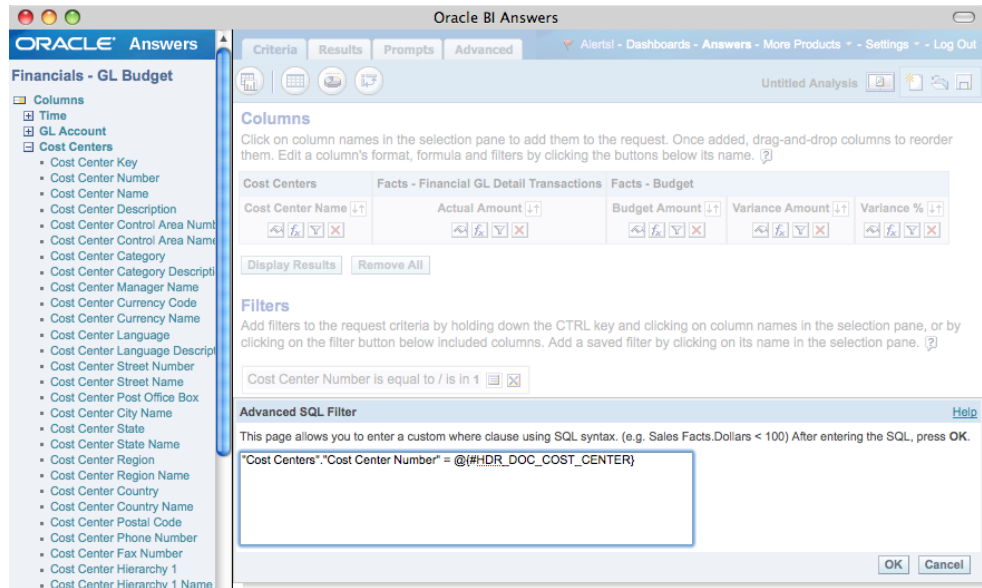
- Column: Cost Center Number
- Operator: is equal to / is in
- Value: (empty)

The dialog box also includes buttons for 'Add', 'Clear Values', 'Advanced', 'Filter based on results of another request', 'Convert this filter to SQL', 'OK', and 'Cancel'.

- Filter the results based on the cost center. On the Criteria tab, create a filter for the Cost Center Number dimension.
- Click the Advanced button and select the option to convert this filter to SQL using the header variable listed in the reference documentation.

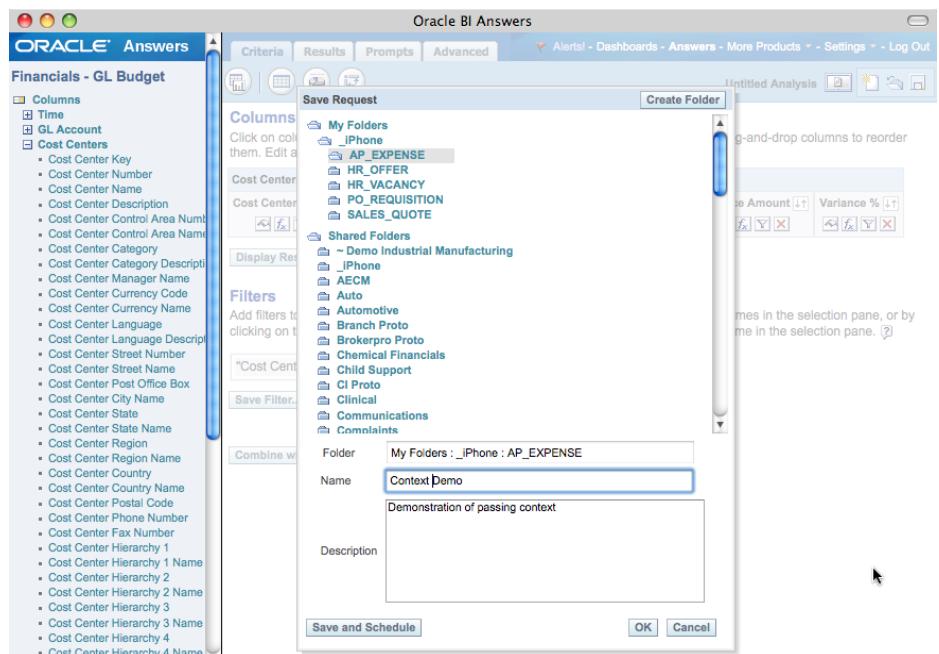
See "Header Variables for Context Passing" in this appendix.

Appendix B: Additional Information about Context Passing



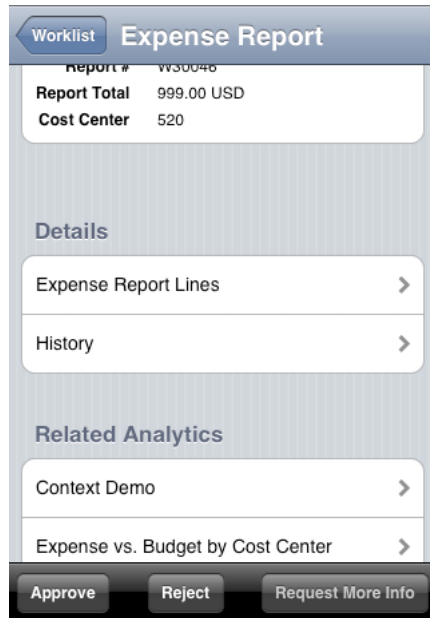
- For the Cost Center field, which is named #HDR_DOC_COST_CENTER, create the text to substitute as:

@{#HDR_DOC_COST_CENTER}



- Save this report in the location defined for expense reports under My folders, as described in step 1.

In this example, the report is named Context Demo.



9. In the Managers application on the iPhone, select an expense report worklist item. The worklist header page displays a link to the Context Demo analytic report in the Related Analytics section.
10. In the Related Analytics section, tap the Context Demo report.



If the report displays the budget information for the cost center that is listed in the header field of the worklist item, then the configuration is successful.

Although this is a simple example, it demonstrates the potential of providing contextually aware analytics to improve business decisions.

Header Variables for Context Passing

This section describes the header variables that you can use for context passing for the following worklist types:

- Expense Reports
- Human Resources Job Offers

Appendix B: Additional Information about Context Passing

- Human Resources Vacancies
- Purchase Order Requisitions

This table lists the header variables for Expense Reports:

Description	Variable
From	FromUserName
Purpose	#HDR_PURPOSE
Begin Date	BeginDate
Report #	DOCUMENT_NUMBER
Report Total	#HDR_DISPLAY_TOTAL
Cost Center	#HDR_DOC_COST_CENTER

This table lists the header variables for Human Resources Job Offers:

Description	Variable
From	FromUserName
Begin Date	BeginDate
Due Date	DueDate
Subject	Subject
Applicant Name	ApplicantName
Job Title	DiscretionaryJobTitle
Grade	Grade
Organization	Organization
Location	Location
Recruiter	Recruiter
Proposed Salary	ProposedSalary

This table lists the header variables for Human Resources Vacancies:

Description	Variable
Business Group	BusinessGroup
VacancyName	VacancyName
StartDate	StartDate
Manager	Manager
Organization	Organization
Status	Status
Job Title	JobTitle
Proposed Salary	ProposedSalary

Appendix B: Additional Information about Context Passing

This table lists the header variables for Purchase Order Requisitions:

Description	Variable
To	ToUserName
From	FromUserName
Begin Date	BeginDate
Requisition #	DOCUMENT_NUMBER
Total Amount	TOTAL_AMOUNT_DSP