Oracle® E-Business Suite Information Discovery

Integration and System Administration Guide

Release 12.2 V9

Part No. E79121-04

September 2018

Oracle E-Business Suite Information Discovery Integration and System Administration Guide, Release 12.2 V9

Part No. E79121-04

Primary Author: Kevin Brown, Pragya Singh Nair

Contents

4 Oracle Channel Revenue Information Discovery Plus

5 Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus

6 Oracle Contract Renewal Command Center Plus

7 Oracle Cost Management Information Discovery Plus

8 Oracle Cost Management Information Discovery: Landed Cost Management

9 Oracle Depot Repair Information Discovery Plus

10 Oracle Discrete Manufacturing Information Discovery Plus

11 Oracle Enterprise Asset Management Information Discovery Plus

12 Oracle Field Service Information Discovery Plus

15 Oracle Financials Information Discovery Plus: Fixed Assets

16 Oracle Human Resources Information Discovery Plus

17 Oracle Installed Base Information Discovery Plus

18 Oracle Incentive Compensation Information Discovery Plus

19 Oracle Inventory Management Information Discovery Plus

20 Oracle iProcurement Information Discovery Plus

21 Oracle iRecruitment Information Discovery Plus

24 Oracle Order Management Information Discovery Plus

25 Oracle Outsourced Manufacturing for Discrete Industries Plus

Index

Send Us Your Comments

Oracle E-Business Suite Information Discovery Integration and System Administration Guide, Release 12.2 V9

Part No. E79121-04

Oracle welcomes customers' comments and suggestions on the quality and usefulness of this document. Your feedback is important, and helps us to best meet your needs as a user of our products. For example:

- Are the implementation steps correct and complete?
- Did you understand the context of the procedures?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Oracle E-Business Suite Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

Preface

Intended Audience

Welcome to Release 12.2 V9 of the *Oracle E-Business Suite Information Discovery Integration and System Administration Guide.*

The intended audience for this guide is:

- Implementers
- Administrative users

See Related Information Sources on page xxii for more Oracle E-Business Suite product information.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Structure

1 Overview of Oracle E-Business Suite Information Discovery

2 Implementation and Integration

3 Oracle Advanced Project Planning and Control Plus

Related Information Sources

Oracle E-Business Suite Information Discovery shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user guides when you set up and use Oracle E-Business Suite Information Discovery.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle E-Business Suite User's Guide

This guide explains how to navigate, enter and query data, and run concurrent requests using the user interface (UI) of Oracle E-Business Suite. It includes information on setting preferences and customizing the UI. In addition, this guide describes accessibility features and keyboard shortcuts for Oracle E-Business Suite.

Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8 document (Doc ID: 2214431.1)

Do Not Use Database Tools to Modify Oracle E-Business Suite Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle E-Business Suite 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 E-Business Suite data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle E-Business Suite tables are interrelated, any change you make using an Oracle E-Business Suite form can update many tables at once. But when you modify Oracle E-Business Suite data using anything other than Oracle E-Business Suite, 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 E-Business Suite.

When you use Oracle E-Business Suite to modify your data, Oracle E-Business Suite automatically checks that your changes are valid. Oracle E-Business Suite 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

Overview of Oracle E-Business Suite Information Discovery

Overview

Oracle E-Business Suite Information Discovery is a sophisticated data discovery platform that searches for and filters data. It is based on a patented hybrid search-analytical database, and gives IT a centralized platform to rapidly deploy interactive analytic applications, and keep pace with changing business requirements while maintaining information governance. Oracle E-Business Suite Information Discovery provides enhanced display capabilities using metrics, graphs and charts. It provides further drill down capabilities using tag cloud, data attributes, and granular dimensions.

Oracle E-Business Suite Information Discovery provides the following features and components:

- Search
- EBS Quick Links
- Bookmarks
- Selected Refinements
- Available Refinements
- Summarization and Metrics Bars
- Customized charts to represent data graphically
- Collection sets of results tables
- Tag Clouds

This Guide describes the following Oracle E-Business Suite Information Discovery products:

Oracle Channel Revenue Information Discovery Plus

Oracle Channel Revenue Information Discovery Plus integrations enable you to search and filter claim and budget related information. You can use the Claims Dashboard to view and analyze Open and Closed Claims using metrics, charts, graphs, and tables. You can use the Budget Dashboard to track funds and related promotional activity transactions to forecast and execute various promotional activities to get maximum return on investments.

Oracle Contract Renewal Command Center Plus

Oracle Contract Renewal Command Center Plus helps drive customer and partner loyalty, improve operational efficiency, and ensures that the return on investments of your customers and your organization are balanced. Using Oracle Contract Renewal Command Center Plus, you can:

- Align decision making and enhance collaboration in an organization to achieve the best outcome.
- Provide context to users when making decisions to ensure alignment of objectives and customer interests.
- Track progress towards objectives and provide a prescriptive course of action to achieve those objectives.
- Provide insight required to evaluate options and select the best business outcomes.

Each command center area and page is organized to support specific business outcomes. Oracle Contract Renewal Command Center Plus is a dashboard-driven product comprised of the following pages:

Customer Management Page - Drives customer loyalty, improves customer renewals, and increases share of the customer.

Portfolio Management Page - Balances Return on Investment (ROI) between customers and organization.

Vendor Management Page - Drives partner loyalty, removes obstacles for sales, and manages partner cash flow.

Contract Management Pages - Contains two separate pages for Lease and Finance Contract Management and Service Contract Management. These pages drive operational efficiency and provide context for implementing transactions in OLFM and OKS.

Oracle Cost Management Information Discovery Plus

Oracle Cost Management Information Discovery Plus enables you to quickly search and filter transaction distribution details across organizations and related entities. Use the Period Health Check page to search for uncosted, unprocessed and material with errors. You can search for Inventory, Manufacturing, Receiving, Shipping, Landed Cost Management, and Enterprise Asset Management transactions that are preventing or delaying period close. Use the Transaction Accounting Register page to search and display all material, manufacturing, receiving, and write-off transaction accounting information. You can also use the guided navigation to identify hidden trends.

Oracle Cost Management Information Discovery Plus: Landed Cost Management

Oracle Cost Management Information Discovery Plus: Landed Cost Management enables you to search, filter and analyze the landed cost data to extract valuable insights for supply and product margin management. You can use the Monitor Daily Operations page to view details of pending activities for Landed Cost shipments. The Landed Cost Analysis page provides an in-depth understanding of the landed cost distribution across inventories, and includes supply information, item information, and purchase order information.

> **Note:** Landed Cost Management Endeca pages are included in the Cost Management Information Discovery Plus product.

Oracle Depot Repair Information Discovery Plus

Oracle Depot Repair Information Discovery Plus enables you to search and filter the most critical service data in a single location and drill down to get more detailed information enabling you to take action using that information. Service managers and service technicians access the Repair Orders Dashboard and claims managers and claims administrators access the Supplier Warranty Claims Dashboard to view, search, and filter the information.

Oracle Discrete Manufacturing Information Discovery Plus

Oracle Discrete Manufacturing Information Discovery Plus enables you to search and view dashboard metrics related to job status, job delays, component and resource shortage, quantity of scraps, and rejects. You can use the Oracle Endeca Discrete Work Order Search page to view and analyze data using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

Oracle Project Manufacturing Information Discovery Plus enables you to get a 360 degree view of Project Supplier Chain activities. It allows you to analyze Oracle Projects and Oracle Project Manufacturing data from different dimensions. You can search for a project using project number, project name, or project description and other project attributes. You can also access the details for a project from the list of projects that matched your search criteria. Based on the Project search result, you can view all the project information and drill down to review additional details for the project including budgets, expenditures, project status, RFQ, quotation, requisitions, purchase orders, blanket POs, manufacturing plans, WIP jobs, onhand balances, sales orders, onhand values, and line schedules. You can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

Oracle Enterprise Asset Management Information Discovery Plus

Oracle Enterprise Asset Management Information Discovery Plus enables you to search and filter asset, work requests, work orders, and item information. Using the eAM Endeca dashboard pages, you can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

Oracle Field Service Information Discovery Plus

Oracle Field Service Information Discovery Plus enables you to search and filter Field Service Execution data and Spares Supply Chain data. You can use the Oracle Endeca Field Service Tasks Summary and Field Service Parts Summary pages to view and analyze data using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

Oracle Financials Information Discovery Plus: Payables

Oracle Financials Information Discovery Plus: Payables enables you to quickly search and filter transaction details across organizations and related entities. You can use the Supplier Balance Page to utilize several different features and functionality to quickly access pertinent payables information. You can use the Holds page to view Payables invoices which are currently on hold due to several reasons. You can also use the Discounts Opportunity page to view Payables invoices along with the discounts that can be availed on these invoices.

Oracle Financials Information Discovery Plus: Receivables

Oracle Financials Information Discovery Plus: Receivables addresses the needs of both casual and advanced receivables personnel. Casual users are company personnel who may require access to the application to gain an understanding of the overall receivables situation to assist customers, process a payment, or file a dispute on behalf of the customer. It enables internal and external users to quickly identify potential problem areas within their area of responsibility, navigate to specific transactions requiring attention, and take necessary actions. The Outstanding Receivables Overview page for internal users targets and addresses requirements of users who are either responsible for identifying potential problem areas in respect to outstanding receivables, or need easy access to individual customer's receivables transactions to take specific action. The Outstanding Receivables Overview page for external users addresses requirements of customers' personnel who are either responsible for reconciling their account receivables balance with the deploying company or vendor, or need easy access to individual transactions to take specific action. Users can leverage the Disputes page to analyze disputes flow within the organization, identify specific dispute reasons that might require closer attention and further investigation, and identify those customers who are abusing the disputes mechanism to delay payments.

The Advanced Users Solution is largely dedicated to receivables personnel with the primary goal of increasing operational efficiency across the end-to-end receivables process. The Outstanding Receivables Overview page offers insight into open receivables transactions across customers and organizations, allowing users to obtain a better understanding of the health of open receivables, review specific transactions and potentially challenging customers that require attention, and take necessary actions. The Billing Process Overview page highlights outstanding issues in Billing such as incomplete transactions, adjustments pending approval, and auto-invoice import processing errors. The Payment Process Overview page identifies payment related transactions and exceptions such as unapplied and on-account receipts, receipt and remittance batches requiring attention, and lockbox errors. The Payment History page provides recent historical information on both paid transactions and applied receipts across customers.

Oracle Financials Information Discovery Plus: Fixed Assets

The Fixed Asset Manager can use the Oracle Financials Information Discovery Plus: Fixed Assets to search and filter assets, locations, and pending mass additions. Oracle Financials Information Discovery Plus: Fixed Assets empowers fixed asset managers and fixed asset accountants to optimize asset utilization, explore asset locations and assignments, and ease reconciliation of assets by providing powerful search and sophisticated available refinements capabilities. The operational efficiency and insight into the asset life cycle is greatly enhanced through key fixed asset metrics, drillable graphs, alerts, and tag clouds, enabling users to quickly identify problem areas and outstanding items that require intervention. Oracle Financials Information Discovery Plus: Fixed Assets allows users to efficiently navigate to the relevant Oracle Applications to take corrective action as necessary.

In Fixed Assets, the following pages enable search functions using Information Discovery Plus integration:

- **Asset Reconciliation Page** - This page displays reconciliation information between fixed asset accounts in SLA (Sub-Ledger Accounting) and in GL (General Ledger). The Fixed Asset Manager can quickly compare balances between SLA and GL, investigate discrepancies and take required and corrective actions.

- **Asset Cost Page** - This page offers superior navigation and discovery capabilities into all financial transactions affecting asset values and provides reconciliation of accounted asset cost and accumulated depreciation to balances in Oracle General Ledger.

- **Asset Aging Page** - This page offers insight into remaining life of your assets with easy overview of asset cost, accumulated depreciation and net book value, and offers actionable links to submit a work request in Oracle Enterprise Asset Management, or to create a new purchase requisition in Oracle Procurement

- **Asset Locations Page** - This Page offers tracking of fixed assets across all locations and gives the opportunity to explore assignments to employees, to detect discrepancies in cost center assignments, and provides actionable links to execute asset transfers and assignments in Oracle Assets in order to resolve missing assignments or mis-allocated resources.

- **Mass Transactions Page** - This page offers insight into pending transactions such as mass additions, mass reclassifications, mass revaluations, and mass transfers. It provides actionable links to Oracle Assets for the fixed asset accountant to ensure all pending transactions are processed on time in order to close asset books with confidence.

- **Additions Pipeline Page** - This page allows the fixed assets manager to check all additions pipeline that exist in Payables and Projects that affect asset costs.

Oracle Human Resources Information Discovery Plus

Oracle Human Resources Information Discovery Plus enables you to identify, measure, prioritize and resolve your day to day HR related business processes or help in formulating strategic decisions. In addition, you benefit from an improvement in the productivity of HR administrators and line managers, reduce repetitive search actions and result in a seamless completion of business flows. You can use the Workforce Explorer page to search employees by leveraging quick search and guided navigation capabilities. HR users can analyze and interpret person data with the aid of key metrics, maps, tags, flexible charts and graphs. It also provides the ability to navigate to employee personnel actions for performing HR transactions.

Oracle Installed Base Information Discovery Plus

You can use Oracle Installed Base Information Discovery Plus to search and filter details such as Up-Sell and Cross-Sell opportunities, search by geographical location of Installed Base, and also search for customer products such as Model/Configuration. Oracle Installed Base Information Discovery Plus displays the most critical data in a single location and drill down to get more detailed information enabling you to take action using that information.

Oracle Inventory Management Information Discovery Plus

Oracle Inventory Management Information Discovery Plus enables you to search, filter, and compare item information. You can use the Oracle Endeca Item Search page to view and analyze data using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

Oracle iProcurement Information Discovery Plus

Oracle iProcurement Information Discovery Plus integration enables you to search for and filter catalogs in a particular store, or browse through the hierarchy of categories within the catalog to locate items and services. You can use the Oracle Endeca Shopping Stores Home page to view and analyze recent requisitions and notifications graphically and in a tabular format.

Oracle iRecruitment Information Discovery Plus Job Search

Oracle iRecruitment Information Discovery Plus Vacancy Search integration enables you to search and filter available job information. You can use the Oracle Endeca iRecruitment Home page to search for jobs using Links, Advanced Search, and Keywords Search. You can use the Oracle Endeca Available Job page to filter and search for jobs based on various attributes. This page contains two tabs - Job List and Compare.

Oracle Learning Management Information Discovery Plus

Oracle Learning Management Information Discovery Plus enables you to add filters to browse and search for new training in the Course Catalog.

Oracle Order Management Information Discovery Plus

Oracle Order Management Information Discovery Plus enables you to search and filter Open Orders, Closed Orders, and Returns information on a wide range of search criteria. You can view and analyze order information and order fulfillment delays using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

Oracle Outsourced Manufacturing for Discrete Industries Plus

Oracle Outsourced Manufacturing for Discrete Industries Plus enables you to search and filter open subcontract orders, delayed subcontract orders, impacted customer orders, open replenishments, delayed replenishments, on-hand and in-transit inventory values, component consumption adjustments, quality rejects, rejected value, uninvoiced assemblies, and components. You can use the Search Page to quickly assess the state of the outsourcing process by identifying where component shortages occur, identify assemblies and Manufacturing Partners (MP) with the most frequent scraps and production rejects and reasons, and identify the top exception causes and corrective actions to take. Buyers can monitor payments due to the manufacturing partners and take appropriate actions to reduce payment backlog to promote positive supplier relationships. Buyers can also monitor on-hand inventory of manufacturing partners and take appropriate actions for better inventory and working capital management.

Oracle Process Manufacturing Information Discovery Plus

Oracle Process Manufacturing Information Discovery Plus enable you to quickly search and filter batch status, batch delays, ingredient and resource shortage, quantity of scraps, quality sample results, and batch yield information. You can use the Batch Search page to view Endeca content for Oracle Process Manufacturing batch processes. You can search for process batches, materials, steps, activities, resources, sales orders, and view production metrics, charts, and a results table.

Oracle Advanced Project Planning and Control Plus

Oracle Advanced Project Planning and Control Plus integration enables you to search and filter project information. You can use the Oracle Endeca Projects Search and Overview page to search for Projects in a particular Operating Unit, and create new projects. You can also use the Oracle Endeca Workplan Overview page to view details of the Workplan. Each page enables you to view and analyze the data using metrics, charts, graphs, and tables.

Oracle Project Procurement Command Center Plus

Oracle Project Procurement Command Center Plus enables your project teams to establish and measure strategic project objectives and drive project procurement planning, decision-making, and execution throughout the lifecycle of the project. It provides an integrated platform for project managers and project buyers to create, view, and update procurement plans so they have the information they need to make planning decisions without the need to alert, notify, or engage in unproductive communication to execute the plan. It breaks traditional functional silos and communication gaps between project management and procurement by ensuring your project teams are on the same page at all times in the lifecycle of the project. The product brings together project and procurement information that is critical to aligning strategy with planning and execution. Project teams can establish strategic objectives, drive down-stream decision making through these objectives, and measure compliance with these objectives throughout the lifecycle of the project. Based on the power of Oracle Endeca for Oracle eBusiness Suite, Oracle Project Procurement Command Center Plus provides interactive, information-based tools that enable the project and procurement team to see and act on the same information. The information discovery tools allow the teams to gain insight for decision-making by transforming information through filters or selecting dimensions that can aggregate, isolate, or correlate information from traditionally disconnected sources based on common and objective criteria. Out-of-the-box charts, graphs, and metrics provide critical, timely information that help project teams to work collaboratively and coordinate execution of the project procurement plan.

See: *Oracle Project Procurement Process Guide* for more information.

Oracle Quality Information Discovery Plus

You can use Oracle Quality Information Discovery Plus to search and filter the most collections data in a single location and drill down to get more detailed information enabling you to take action using that information. As a Product & Process Quality Engineer or an Analyst, you can use the Quality Collection Results, Nonconformance Collection Results, and Corrective Actions Collection Results pages to perform searches across quality plans and plan types, across quality plan hierarchies for quality and nonconfirmance enabling you to take early corrective actions. You use these pages, based on your role, to review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

Oracle TeleService Information Discovery Plus

You can use Oracle TeleService Information Discovery Plus to search and filter all service requests imported into Endeca. Using the Service Operations Dashboard, you can review critical metrics, tag clouds, interact with graphs, and view service requests details. In addition to the search and filter capabilities, the Service Operations Dashboard contains action-based analytics where you can diagnose an issue and perform efficient and effective corrective actions on those service requests. Examples of corrective actions include reassigning requests to the appropriate group or owner, diagnosing issues, or contacting customers for additional information.

Oracle Warehouse Management Information Discovery Plus

Oracle Warehouse Management Information Discovery Plus enables you to search and filter outbound, inventory, and labor (productivity) information from the warehouse. The Plan Fulfillment page lets you plan the fulfillment batches and waves. The Track Fulfillment page lets you track the fulfillment process and react in real-time to changes impacting the outbound activities. The Space Utilization page lets you track the fragmentation in the warehouse and suggest material movement to manage fragmentation. The Labor Utilization page lets you plan and manage labor in the warehouse. Using these Warehouse Management Endeca pages, you can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables. In addition to the search and filter capabilities, each WMS page contains action-based analytics where you can diagnose an issue and take specific actions.

2

Implementation and Integration

Administer Oracle E-Business Suite and Information Discovery Data

Pre-Requisites

Ensure you comply with the following pre-requisites before you proceed with the remaining integration steps:

1. Installed and completed common configuration as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

2. Installed additional patches required for Oracle Advanced Project Planning and Control Plus as described in *Oracle Projects Extensions for Oracle Endeca Product Configuration Notes* Document ID: 1470151.1

Navigation and Filtering Components in Oracle E-Business Suite Information Discovery Plus

Oracle E-Business Suite Information Discovery Plus provides various navigation and filtering options that enable you to filter and search for data. These components include:

Search - Users can configure the search component to determine the data source, how to determine a matching record, and whether to support type-ahead functionality. You can use the search component to enter keywords to conduct a search. If multiple search configurations are available, you can first select the search configuration that you want to use. The Search Within check box enables a search limited to currently displayed data. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

EBS Quick Links - Use the EBS Quick Links component to link and quickly navigate to Oracle E-Business Suite forms and pages. You can also create and configure links to navigate between Information Discovery pages.

Bookmarks - The Bookmarks component allows you to save the current state of all navigation and component criteria that you can repeat.

Available Refinements - Use the Available Refinements component to filter data based on the current available values or value ranges for selected attributes that are displayed within attribute groups. You can select values in order to refine the current data to only include records with those values. For some attributes, you can select multiple values. You can also process negative refinement to only include records that do not have a selected value.

Selected Refinements - The Selected Refinements component displays all values that you have selected to filter data and allows you to quickly make adjustments to the current refinement. You can clear all filters or remove specific items from the list of current filters.

Concurrent ETL Graphs

To enable concurrent ETL graphs:

You must enable Oracle Endeca ETL graphs to be run from the Oracle E-Business Suite as a concurrent request.

1. In Oracle E-Business Suite, set the profile option FND_ENDECA_INTEGRATOR_URL to http://<endeca_hostname>:7006/clover.

2. Run the script 'storeCloverLoginInFndVault.sh' to add Clover login credentials in EBS Fnd Vault. The path is /u01/Oracle/quickInstall/bin/ in Build-12 QI of 12.2.5 V8.

   > **Note:** The script automates the creation of the Clover login credentials process and prompts you to provide an EBS DB apps schema password, clover application user name and password. When you enter the values, the script connects to the EBS database using apps credentials, and stores the clover application login credentials in EBS FND_VAULT.

3. The responsibility 'Information Discovery Administrator' allows an Oracle E-Business Suite user to access the concurrent program 'Run ETL graphs'. This provides the ability to run Full or Incremental graphs for a specified application sandbox. The system administrator can add this responsibility to any Oracle E-Business Suite user.

4. The 'Information Discovery Administrator' responsibility provides the following menu options for the 'Run ETL graphs' concurrent program:

   - **Submit Requests**

     Clicking 'Submit Requests' enables users to launch a concurrent request. After selecting 'Single Request' and clicking 'OK', the submit request form displays. After selecting 'Run Clover ETL Graphs' into the Name field, users are prompted to specify the application 'Sandbox' (e.g. eam or icx-iproc) and the 'Graph Type' (Full.grf or Incremental.grf). Users can submit requests to run immediately by clicking 'Submit'. After submitting a request, the status of this request can be tracked using the 'View Requests' and 'Monitor' menu options.

   - **Schedule**

     Clicking 'Schedule' allows users to schedule one or more requests to launch the concurrent program 'Run Clover ETL Graphs'. Users are prompted to specify the application 'Sandbox' (e.g. eam or icx-iproc) and the 'Graph Type' (Full.grf or Incremental.grf). Users can submit the request to run immediately by clicking 'Submit' or can specify additional concurrent request options by navigating through the options pages after clicking 'Next'. After submitting a request, the status of this request can be tracked using the 'View Requests' and 'Monitor' menu options.

- **Monitor**

  This menu option allows users to access the list of concurrent requests that they have submitted in the Oracle E-Business Suite. By default 'All My Requests' displays requests submitted within the last seven days. You can modify the query criteria by clicking the 'Advanced Search' button to specify requests to display. Users can click the 'Details' icon and then the 'View Log' button to view the concurrent request log file for the submitted concurrent request.

- **View Requests**

  Clicking 'View Requests' launches the View Requests form in the Oracle E-Business Suite. This enables users to search for a specific request or all of their concurrent requests. Clicking 'View Log' displays the log file for that concurrent request.

  > **Note:** If the concurrent request for a longer running Full Load Graph displays as 'Completed, Error', then you can access the log file to determine the Run ID in Clover and the URL for the clover UI, and access the 'Executions History' through the Clover UI.

Assigning Administrator Role to E-Business Suite Users

Oracle E-Business Suite users do not have the Endeca Studio Administrator role assigned by default and therefore cannot modify Information Discovery pages. If you have a requirement to allow E-Business Suite users to modify Endeca pages, then you must assign the Administrator role to users.

To assign Administrator role to E-Business Suite users:

1. Navigate to Endeca Studio (see your System Administrator to obtain the Endeca Studio URL, user id, and password).

2. Login as Studio Admin (admin@oracle.com). The default password is welcome123.

3. Go to the Control Panel.

4. Click the Users link.

5. Click on EBS User Name.

6. Click on the Roles link.

7. Click Select Link.

8. Select the Administrator Role.

9. Click the Save button.

The E-Business Suite user should now have administrator privileges and access to Information Discovery pages.

3

Oracle Advanced Project Planning and Control Plus

This chapter covers the following topics:

Overview

The Oracle Advanced Project Planning and Control Plus application suite includes a variety of features central to the requirements of competent and efficient enterprise project management. It enables project managers to effectively oversee their projects, assess progress against predetermined milestones and budgets, staff their projects with appropriate talent, and quickly generate a wide variety of reports. It also helps virtual and globally distributed project teams to efficiently communicate, collaborate, and complete tasks. Oracle Advanced Project Planning and Control Plus provides a programmatic strategy for tracking, monitoring and controlling a project. By having all key performance indicators of the project at one place enables project managers to watch the metrics, drill down in to details, discover reasons for deviations and then to take appropriate, corrective measures if needed.

Oracle Advanced Project Planning and Control Plus enables you to search and filter projects and tasks from a dashboard, view financial, workplan and expenditure information and make updates to the plans. You can view and analyze financial and workplan information and drilldown to expense items or other information using performance metrics, charts, graphs, tables and alerts. Based on this data, project managers or controllers can take immediate action to bring their project back on track and on schedule.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite (EBS) Release 12.2 V8 for the Oracle Advanced Project Planning and Control Plus application. This supplements the information provided in Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8 (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

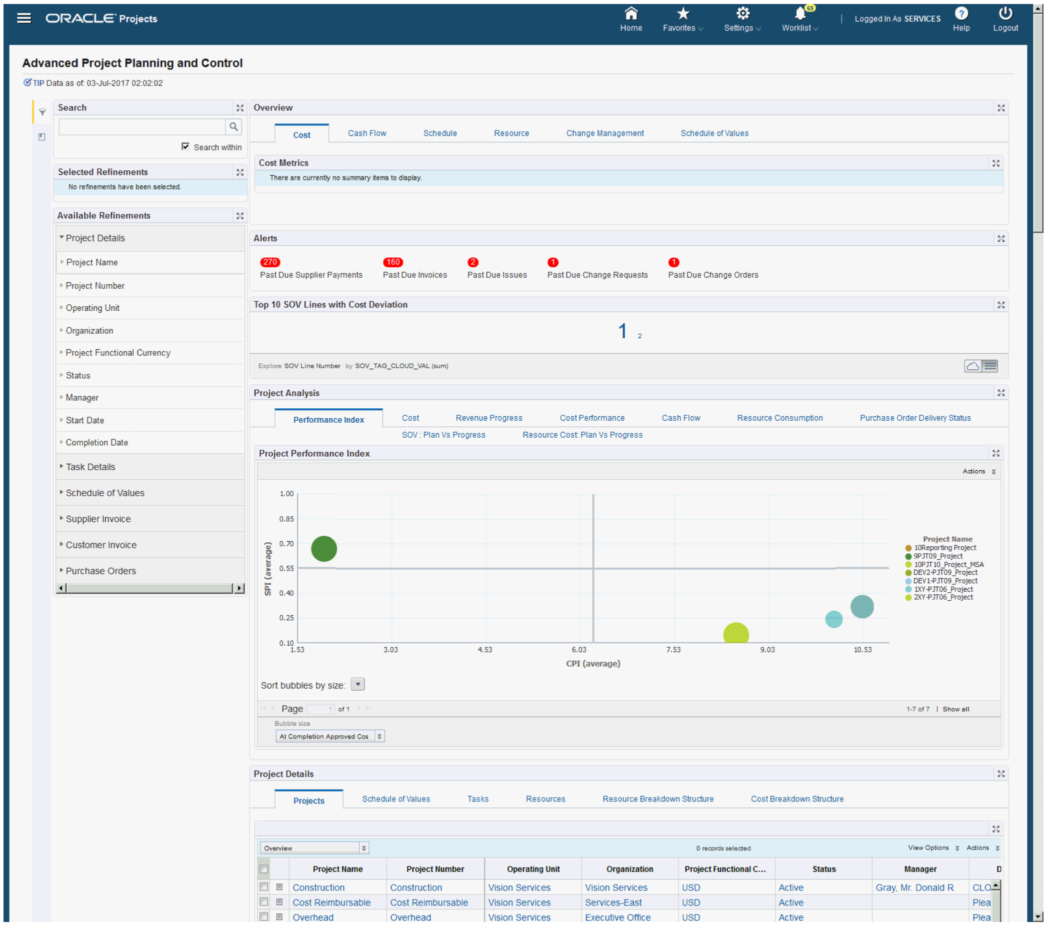
Oracle Advanced Project Planning and Control Plus User Interface and Integration

Oracle Advanced Project Planning and Control Plus User Interface

Oracle Advanced Project Planning and Control Plus updates are available from the Advanced Project Planning and Control, the Workplan Overview, the Billing Overview, the Financial Overview, and the Expenditure Overview pages. All these page displays information and data graphically and in tabular format.

Advanced Project Planning and Control Page

The Advanced Project Planning and Control page displays monitoring metrics across the projects and enables you to navigate down to individual projects and further to the task and resource assignment level. The components of the Advanced Project Planning and Control page are:



Region	Component
Tip	Displays the date on which the data was last refreshed.

<table>
<tr><th>Region</th><th>Component</th></tr>
<tr><td>Search

• Boolean Search

• Search Within</td><td>The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.

Partial record search is enabled for specific attributes. Attributes for partial record search include:

• Project Number
• Project Name
• Manager
• Task Name
• Task Number
• Task Manager
• Supplier Name
• Resource Class
• Resource Name
• Customer Name
• Project ID
• Supplier Number</td></tr>
</table>

Region	Component
	• PO Number
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Project Details • Task Details • Supplier Invoice • Customer Invoice • Purchase Orders

Region	Component
Overview	Consists of the following details: • Cost tab - this displays all metrics and measures abstracted from financial plans and final progress. This metrics displays Currency, Total Revenue, Planned Revenue to Date, Actual Revenue to Date, Budgeted Cost Work Performed, Actual Cost Work Performed, Total Expenditure Budget (BAC), and CPI. • Cash Flow tab - displays Gross Margin till Date (GMTD), Cash Inflow and Cast Outflow, Cash Position, Past Due Invoices, Past due Vendor Payments, Open Payments, Work in Progress (Unbilled), and Non Billable Expenditure metrics. • Schedule tab- displays schedule performance metrics like SPI, Planned Financial %, Actual Financial %, Cost Variance (CV), Estimate At Completion (EAC), Estimate To Complete (ETC), and Variance At Completion (VAC). • Resource tab - displays resource performance indicators against their capacity for People performance Index, Equipment Performance Index, Material Performance Index, People forecast, Equipment Forecast, and Material Forecast. • Change Management tab - displays metrics related to change management. This includes Open Issues, Pending Change Orders, and Pending Change Requests. • Schedule of Values tab - displays metrics related to schedule of values. This includes Qty% Complete, Plan vs Progress Percent, Unit Cost Variation, Progress vs Billing Ratio, and %WIP from

Region	Component
	Billing
Alerts	The available alerts are: • Issues Past Due - displays issues that are past their due date • Past due Invoices - displays customer invoices that are past due by the committed payment date • PO Past Due Deliveries (Delivery beyond need by date) - displays Purchase Orders with a Promised date greater than Need By date • Past Due Supplier Payments - displays supplier payments which are pending as of the system date • Past Due Change Requests - displays change requests which are past their due dates. • Past Due Change Orders - displays hange orders which are past their due dates. **Note:** Alerts are displayed based on the criteria defined above. If there is no data matching the criteria, then that alert is not displayed.
Top 10 SOV Lines with Cost Deviation	This tag cloud displays the top ten Schedule of Values lines with cost deviation.

Region	Component
Project Analysis	Contains the following tabs: • Performance Index - displays a bubble chart called Project Performance Index, where each bubble represents a project and the size of the bubble represents the total revenue value of the project. The X axis represents CPI and the Y axis represents SPI. Depending on placement of project bubble in the quadrant, it represents the performance against the CPI and SPI. Click an individual bubble, the bubble chart renders again to a single project and all the top tasks of that project shown as bubbles. You can export data, print data or use the save as image option for this chart. • Cost - displays a bar & line chart (in combination) called S- Curve, where the bars represent the planned revenue across the periods. The Y axis represents the amount and the X axis represents time or periods. The Line (Curve) represents the actual revenue and Actual cost (ACWP & BCWP). • Revenue Progress - this tab displays a Revenue Progress bar chart, where the bars represent planned revenue and the actual revenue (based on task). The Y axis represents the amount and the X axis represents tasks. Additionally, this tab also displays another bar chart called Revenue, where the bars represent At-Completion Approved Revenue, Planned Revenue, and Actual Revenue. You can change the value axis to Opportunity Lost using the list of values. If you do this, then the bars represent At-Completion Approved Revenue, Opportunity Lost (Planned Revenue – Actual Revenue), and Balance Revenue (At-Completion Approved Revenue - Actual Revenue). You can export data, print data or use the save as image option for this chart.

Region	Component
	• Cost Performance - this tab displays the High Level Cost Performance bar chart, which displays cost performance either across projects or across tasks within a project based on the context. By default, the bars represent BCWP & ACWP, and you can change the value axis to: • Cost Variance - displays the cost variance between the BCWP & ACWP • Revenue Variance - displays the difference between the planned revenue and actual revenue • ITD planned vs ITD Actual Cost - displays the Planned Cost and Actual Cost • ITD planned vs ITD Actual Revenue - displays the Planned Revenue and Actual Revenue You can export data, print data or use the save as image option for this chart. The Cost Performance tab also displays a Cost Deviation bar chart, which is always at the project level and the top task level. However, based on the selection made in the High Level Cost Performance chart, the next level of tasks is shown in the cost deviation chart. • Cash Flow tab - displays a combination of lines and bar chart called Cash Flow, where the bars represent current month cash inflow (from AR) and cash out flow (from AP). The lines represent cumulative cash inflow from ITD and cumulative cash out flow since ITD. This tab also displays a pie chart called Billed vs Unbilled, which displays the ratio of the total Billed vs Unbilled expenditures.

Region	Component
	• Resource Consumption tab - displays a bar chart called Resource Consumption, where the three bars which represent three resource classes - : People, Material and Equipment. This displays the actual spent on each resource class against their budgeted cost. Budgeted cost is taken as 100 % and the actual are the representation against budget. In addition, this tab also displays a pie chart, called Top Commodities (Category) Consumed To-Date, which represents the top commodities with spend based on their share of total spend on procurement for the project. • Purchase Order Delivery Status tab - displays a bar chart Purchase Order Status, which represents how much is ordered in total and how much is received based on each material. • SOV Plan Vs Progress - this bar chart represents the planned quantity of work to be executed for a deliverable (SOV) and the executed quantity of the same deliverable. You can sort based on Project Number, Project Number by Planned Quantity (sum), or Project Number by Actual Quantity (sum). • Resource Cost Plan Vs Progress - these bar charts display actual resource-wise cost spent versus the total effort assigned for the resource on the project. You can also view the chart by Project Number, SOV Line Number or Period. They also represent the amount of work progressed for the planned effort and planned quantity. You can drill down on this chart from Resource class to Resource level, Resource productivity efficiency. You can view the following charts: • Available Vs Required - you can sort

Region	Component
	based on Resource Class, Resource Class by Planned Cost Work Progressed (sum), Resource Class by Actual Cost (sum), or Resource Class by Resource Productivity Index (average). • Planned Vs Progress - you can sort based on Resource Class, Resource Class by Planned Quantity (sum), Resource Class by Actual Quantity (sum), or Resource Class by Resource Productivity Index (average). You can export data, print data or use the save as image option for these charts.

Region	Component
Project Details	This displays the following tabs: • Projects - you can view the Overview of the selected Project , or choose an action to complete for the project. Click any of the hyperlinks in the Overview view to refine your search results further using the selected value. In the Actions view, the Project Name and Project Number enable you to refine your search results using those values. Click Details to view the Project Details in the Project Home page. Click Actions to navigate to the Project Actions page, where you can select the action to complete and proceed to complete it. Click Workplan to navigate to the Workplan Overview page. Click Financial to navigate to the Financial Overview page. Click Expenditures to navigate to the Expenditure Overview page. Click Procurement to navigate to the Procurement Plan page. Click Billing to navigate to the Billing Overview page. Click Create Issue to navigate to the Issues page. Click the Create Change Request link to navigate to the Change Requests page. Click Create Change Order to navigate to the Change Orders page. • Schedule of Values - you can view the Overview, Revenue, Cost, Forecast, or choose an Action to complete. You can also click the row to view details of the selected row. • In Overview, you can view the Project Number, SOV Line Number, SOV Line Description, UOM, Schedule Start Date, Schedule End Date, and Project Name. Click any of the hyperlinks in the Overview view to refine your search results further using the selected value.

Region	Component
	- In Revenue, you can view the Project Number, SOV Line Number, Rate (billing rate in project currency), Planned Quantity, Planned Revenue, Planned ITD Quantity, Planned ITD Revenue, Actual Quantity, Actual Progressed Amount, and Schedule Performance Index. Click any of the hyperlinks in the Revenue view to refine your search results further using the selected value. - In Cost, you can view the Project Number, SOV Line Number, Budgeted Work Scheduled Cost, Budgeted Work Performed Cost, Actual Work Scheduled Cost, Actual Work Performed Cost, and Cost Performance Index. Click any of the hyperlinks in the Cost view to refine your search results further using the selected value. - In Forecast, you can view the Project Number, SOV Line Number, Estimate to Complete, Estimate at Completion, and To Complete Performance Index. Click any of the hyperlinks in the Forecast view to refine your search results further using the selected value. - In Actions view, you can view the Project Number and the SOV Line Number. Click Create Change Order to create a change order for the selected project using the Change Orders page. Click View/Edit ARR to open the Activity Resource Requirements page and maps to the specific SOV for the selected project. - Tasks - you can view the Project Name, Task Name, Task Number, Task Manager, Project Functional Currency,

Region	Component
	Billable, Critical, Task Scheduled Start Date, Task Scheduled Finish Date, Task Actual Start Date, Task Actual Finish Date, Quantity, Raw Cost, Burdened Cost, Actual Quantity, Actual Raw Cost, Actual Burdened Cost, ETC Quantity, ETC Burdened Cost, Variance Due to Quantity, Variance Due to Cost, Cost Performance Index, Scheduled Performance Index, Earned Value, Total Planned Cost, ETC_WBS, Variance at Completion, and Cost Variance. Planned, Actual Quantity, Cost, Revenue At Completion /ITD/PTD/QTD/YTD amounts/values are also displayed. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare two or more rows. You can use the Actions menu to Update Multiple Tasks, Mask Task Update, Mass Progress Update by selecting two or more tasks for a selected project. You cannot perform Update Multiple Tasks, Mast Task Update or Mass Progress Update if tasks are selected from different projects. • Resource Breakdown Structure - you can view the Project Name, Resource Name, Outline Number, Project Number, At Completion Approved Revenue, and At Completion Approved Cost. Revenue/Budget/Forecast/ EVM amount/values are also displayed. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows. • Cost Breakdown Structure - you can view the Project Name, Project Number, Cost

Region	Component
	Code Name, Cost Code, Outline Number, Planned Quantity, Actual Quantity, Planned Cost, Actual Cost, Planned Revenue. Actual Revenue, Primary Cost Forecast, and Primary Revenue Forecast. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows.

Region	Component

Cash Flow and Change Management	Displays the following tabs:
	• Cash Flow - you can view the Project Name, Project Number, Period, Cash Inflow, and Cash Position. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu.
	• Customer Invoices - choose between the Summary or Details options from the list of values.
	    • Summary list option - you can view the Project Name, Customer Name, ITD Invoiced Amount, Current Period Invoice Amount, ITD Receipt Amount, Current Period Receipt Amount, ITD Outstanding Amount, Retention Amount, Last Invoice Number, Last AR Invoice Number, and Last Invoice Date. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows.
	    • Details list option - you can view the Project Name, Customer Name, Draft Invoice Number, AR Invoice Number, Draft Invoice Date, Invoice Amount, Receipt Amount, Outstanding Amount, Past Due Draft Invoices, AR Invoice Status, and Draft Invoice Status. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows.

Region	Component
	• Supplier Invoices - choose between Summary, Details or Actions options from the list of values. • Summary list option - you can view the Project Number, Supplier Number, Supplier Name, ITD Invoiced Amount, Current Period Invoice Amount, ITD Paid Amount, Current Period Paid Amount, ITD On Hold Amount, ITD Retained Amount, ITD Outstanding Amount, ITD Discount Amount. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows. • Details list option - you can view the Project Number, Supplier Number, Supplier Name, Task Number, Invoice Number, Order Number, Invoice Amount, Supplier Invoice Date, Paid Amount, Last Payment Date, Payment Hold, Payment Hold Reason, Invoice Hold, Invoice Hold Reason, and Past Due Vendor Payments. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows. • Actions list option - you can view the Project Number, Supplier Number, Supplier Name, Invoice Number, and Order Number. Click any of the links to refine your search results further using that value. Click Apply/Release Holds to navigate to the Search Supplier Invoices page. Click View

Region	Component

	PO Deliverables to navigate to the PO Deliverables page. Click Create Deduction to navigate to the Deduction page. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows.
	• Purchase Orders - choose between Details and Actions options from the list of values.
	  • Details list option - you can view the Project Number, PO Number, Item Description, Task Name, Task Number, Order Status, Supplier Name, Supplier Number, Need By Date, Invoice Number, Promised Date, Total Amount, Item Category, Item Name, Unit Price, Currency, Unit of Measure, Ordered Quantity, Received Quantity, and Invoiced Quantity. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows.
	  • Actions list option - you can view the Project Number and PO Number, Item Description, Task Name, and Task Number. Click any of the links to refine your search results further using that value. Click the View PO Deliverable link to navigate to the PO Deliverables page. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows.
	• Issues - choose from the Overview or

Region	Component
	Actions options from the list of values. • Overview list option - you can view the Project Name, Project Number, Name, Summary, Resolution, Task Number, Owner, Priority, Progress Status, Open Actions, Status, Days Until Due, and Days Since Updated. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows. • Actions list option - you can view the Project Name, Project Number, and Name. Click any of the links to refine your search results further using that value. Click View Issue to navigate to the Issues page. Click Convert to Change Request to navigate to the Change Request page. Click Convert to Change Order to navigate to the Change Order page. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows. • Change Requests - choose between the Overview and Actions options from the list of values. • Overview list option - you can view the Project Name, Project Number, Name, Summary, Resolution, Task Number, Owner, Priority, Days since Updated, Open Actions, Cost, Revenue, Margin%, Status, Progress Status and Days Until Due. Click any of the links to refine your search results further using that value. You can Print, and Export the search

Region	Component
	results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows. • Actions list option - you can view the Project Name, Project Number, and Name. Click any of the links to refine your search results further using that value. Click View Change Request to navigate to the Change Request page. Click Convert to Change Order to navigate to the Change Order page. Click Include Impact to navigate to the Impact page. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows. • Change Orders - choose between the Overview and Actions options from the list of values. • Overview list option - you can view the Project Name, Project Number, Name, Summary, Resolution, Task Number, Owner, Priority, Progress Status, and Days Until Due. Click any of the links to refine your search results further using that value. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows. • Actions list option - you can view the Project Name, Project Number, and Name. Click any of the links to refine your search results further using that value. Click Change Order Details to go to the Change Order Details page. Click Convert to Change Request to navigate to the Change Request page.

Region	Component
	Click Implement Impact to navigate to the Impact page. You can Print, and Export the search results from the Actions menu. You can also use the Actions menu to Compare by selecting two or more rows.

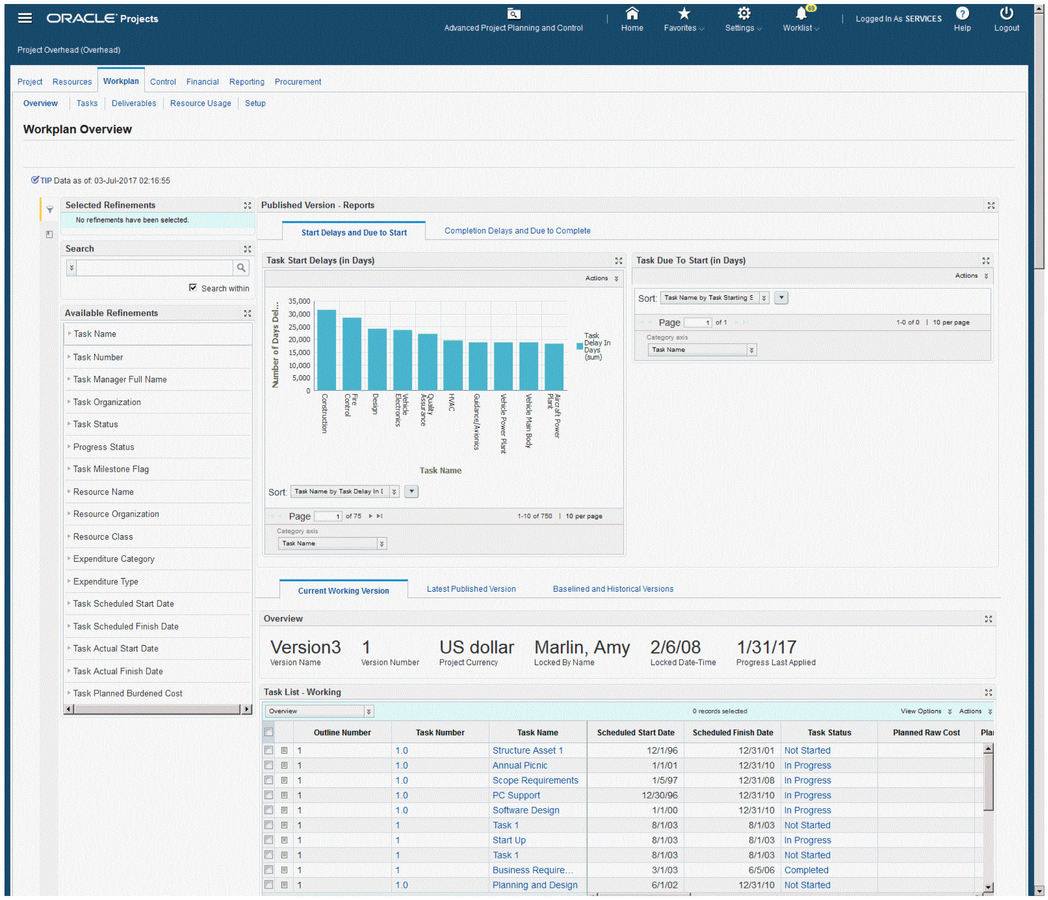
Workplan Overview Page

The Workplan Overview page displays financial metrics and task for a specific project. The components of the Workplan Overview page are:

- Report Overview and Metrics – allow users to view project and task information such as task start delays.
- Workplan versions allow users to view various versions of the workplan. The versions include current working, latest published, baselined and historical versions.
- Task List – allow users to view details of the tasks.
- Resource List – allow users to view details of the assignments

The Workplan Overview page contains filtering components that you can use to search, navigate and filter the data displayed in other components and consists of the following regions and components:

The following graphic displays the Workplan Overview page. There are a couple of ways to access the Workplan Overview page.



- From the Advanced Project Planning and Control page, select the Workplan icon.
- You can access the Workplan Overview page for the existing Workplan tab > Overview.

Region	Components
Tip	This displays the date and time stamp of the last ETL update.

Region	Components
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Bill Group • Customer • Task Name • Task Number • Task Manager • Resource Name • Resource Class • Employee Name • Supplier Name • PO Number • Receipt Number • Organization

Region	Components
	• Task ID • Invoice Number
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Task Name • Task Number • Task Organization • Task Status • Task Milestone Flag • Resource Name • Resource Organization • Resource Class • Task Scheduled Start Date • Task Scheduled Finish Date • Task Actual Start Date

Region	Components
Alerts	You can use alerts to direct you attention to any potential issues or risks that might arise on the project or task. There is one configurable alert: • Late Tasks

Published Versions - Reports	• Start Delays and Due to Start tab:
	  • Task Start Delays (in Days) - This report displays tasks and the number of days the tasks has been delayed. You can sort the Series Dimension by Task Name or Task Name by Number of Days Delayed (sum).
	  • Task Due to Start (in Days) - This report displays the tasks and the number of days before the task start date. You can sort the Series Dimension by Task Name or Task Name by Number of Days to Start (sum).
	• Completion Delays and Due to Complete tab:
	  • Task Completion Delays (in Days) - This report displays the task and the number of days the task has been delayed past its completion date. You can sort the Series Dimension by Task Name or Task Name by Task Completion Delay in Days (sum).
	  • Task Due to Complete (in Days) - This report displays the task and the number of days the task is due to be complete. You can sort the Series Dimension by Task Number and Task Name by Task Completion Due in Days (sum).
	You can also print or export these task details.

Region	Components

Current Working Version Tab	• Overview - this tag cloud displayed the Version Name, Version Number, Project Currency, Locked by Name, Locked Date-Time, and Progress Last Applied.
	
	The Task List - Working and Resources List - Working tables display the following details:
	
	Task List - Working:
	
	• Overview
	  • Outline Number
	  • Task Number
	  • Task Name
	  • Scheduled Start Time
	  • Scheduled Finish Time
	  • Task Status
	  • Raw Cost Planned
	  • Burdened Cost Planned
	  • Task Manager Full Name
	  • Task Organization
	  • Task Milestone Flag
	  • Progress Status
	  • Critical Flag
	  • Task Priority
	  • Display Sequence
	  • SOV LIne Number

Region	Components
	- Activity Resource Requirement • Actions - Outline Number - Task Number - Task Name - Task Details - click this to navigate to the Task Details page - Additional Information - click this to navigate to the Update Additional Task Information page Resource List - Working • Task Name • Resource Name • Full Name • Resource Organization • Planned Hours • Planned Raw Cost • Planned Burdened Cost • Resource Class • Unit of Measure • Forecast ETC Basis • Expenditure Type • Expenditure Category

Region	Components
	Table View Options include: • Conditional Formatting • Hide/Show Columns • Sort • Reset table to default Table Actions include: • Print • Update Multiple Tasks (available only from Task List - Working table) - Use to make updates for the tasks on the selected tasks. The updates are carried through to all the selected task in a single update on the current working version. **Note:** For SOV, you cannot delete task assignment and you cannot make updates to all task assignments. • Mass Tasks Update (available only from Task List - Working table) - Use to make updates for tasks on an updateable table where user can enter different values for each of the selected tasks on the current working version. • Export

Region	Components

Latest Published Version Tab	• Overview
	  • Version Name
	  • Version Number
	  • Published Date-Time
	  • Published By
	  • Project Currency
	  • Late Tasks
	• Financial Overview
	  • Raw Cost Variance
	  • Burdened Cost Variance
	  • ITD Actual Raw Cost
	  • ITD Actual Burdened Cost
	
	The Task List - Latest Published and Resources List - Latest Published tables display the following details:
	
	Task List - Latest Published:
	• Overview
	  • Outline Number
	  • Task Number
	  • Task Name
	  • Scheduled Start Time
	  • Scheduled Finish Time
	  • Task Status

Region	Components
	- Planned Raw Cost - Planned Burdened Cost - Task Manager Full Name - Task Organization - Task Milestone Flag - Critical Flag - Task Priority - Progress Status - Display Sequence - SOV Line Number - Acticity Resource Requirement • Actions - Outline Number - Task Number - Task Name - Additional Information - click this to navigate to the Update Additional Task Information page Resource List - Latest Published • Task Name • Resource Name • Full Name • Resource Organization

Region	Components
	• Planned Hours • Planned Raw Cost • Planned Burdened Cost • Resource Class • Unit of Measure • Forecast ETC Basis • Spread Curve • Expenditure Type • Expenditure Category Table View Options include: • Conditional Formatting • Hide/Show Columns • Sort • Reset table to default Table Actions include: • Print • Export • Mass Update Progress (available only from Task List - Latest Published table) - Use to make updates for the tasks on an updateable table where you can enter different values for each selected tasks on the latest published version.

Region	Components
Baselined and Historical Versions Tab	Overview: • Version Name • Version Number • Published Date-Time • Published By • Project Currency The Task List - Baseline, Resources List - Baseline, and Other Versions tables display the following details: Task List - Baseline: • Outline Number • Task Number • Task Name • Scheduled Start Date • Scheduled Finish Date • Task Status • Planned Raw Cost • Planned Burdened Cost • Task Manager Full Name • Task Organization • Task Milestone Flag • Critical Flag • Task Priority

Region	Components
	• Progress Status • Display Sequence • SOV Line Number • Activity Resource Requirement Resource List - Baseline: • Task Name • Resource Name • Full Name • Resource Organization • Planned Hours • Planned Raw Cost • Planned Burdened Cost • Resource Class • Unit of Measure • Spread Curve • Forecast ETC Basis • Expenditure Category Other Versions • Version Name • Published By • Planned Raw Cost • Actual Raw Cost

Region	Components
	• Planned Burdened Cost • Actual Burdened Cost Table View Options include: • Conditional Formatting • Hide/Show Columns • Sort • Reset table to default Table Actions include: • Print • Export

Financial Overview Page

The Financial Overview page displays financial metrics and task status information for a specific project. The components of the Financial Overview page are:

- Reports – Display performance information and metrics for the project or task such as Forecast Burdened Cost Variance, Actual Burdened Cost over Budget, Forecast Effort Variance, ETC Raw Cost Variance.
- Task List – Display detail information about each task including access to initiate common task actions or drill into expenditure items.
- Project Lines – Display detail information about each planning element grouped by column sets, including access to initiate an update to the plan line.

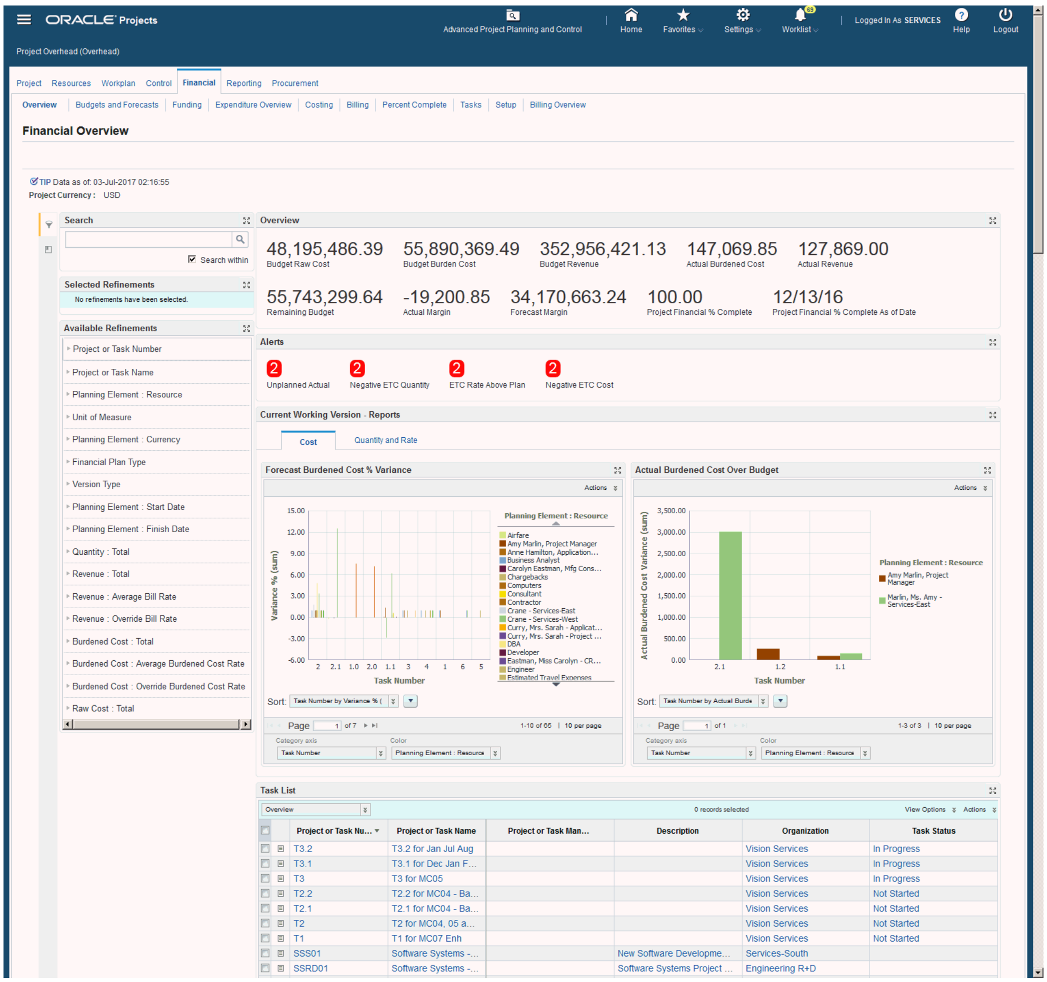
The Financial Overview page will display values for the project only under the following conditions:

- The project has a fully shared structure
- The project has workplan enabled
- The project has at least one version of either the Approved Cost Budget or the Approved Revenue Budget

- This is applicable only for the current working version and current baseline versions.

If the project does not meet the above criteria, then the application displays an information message in the page header, stating: The project you have selected does not meet the conditions required and cannot be displayed on the Financial Overview page. To view or modify a financial plan for budgets and forecasts, use the Maintain Versions page.

The following graphic displays the Financial Overview page.



From the Advanced Project Planning and Control page, click the Financial link in the Project Details actions region to access the Financial Overview page.

The Financial Overview page contains filtering components that you can use to search, navigate and filter the data displayed in other components and consists of the following regions and components:

Region	Components
Tip	This displays the date and time stamp of the last ETL update.

Region	Components
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Bill Group • Customer • Task Name • Task Number • Task Manager • Resource Name • Resource Class • Employee Name • Supplier Name • PO Number • Receipt Number • Organization

Region	Components
	• Task ID • Invoice Number
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Alerts	You can use alerts to direct you attention to any potential issues or risks that might arise on the project or task. There are configurable alerts: • Unplanned Actuals - Alert displays task with no current planned quantity or amount, yet there are actual costs against the task. • ETC Rate Above Plan - Alert displays tasks where the ETC Raw Cost rate is greater than the Current Budget Average Raw Cost rate. • Negative ETC Quantity - Alert displays tasks where there is a negative ETC quantity or cost.

Region	Components
Overview	• Budget Raw Cost • Budget Burdened Cost • Budget Revenue • Actual Burdened Cost • Actual Revenue • Remaining Budget • Actual Margin • Forecast Margin **Note:** For Actual Margin and Forecast Margin positive margin is displayed in green, zero margin is displayed in yellow and negative margin is displayed in red. • Project Financial % Complete • Project Financial % Completion As of Date

Region	Components
Current Working Version - Reports	Cost tab • Forecast Burdened Cost % Variance - you can sort by Task Number and Task Number by Variance % (average) • Actual Burdened Cost Over Budget - you can sort by Task Number and Task Number by Actual Burdened Cost Variance (sum) Quantity and Rate • Forecast Effort Variance - you can sort by Task Number and Task Number by Forecast Effort Variance (sum) • ETC Raw Cost Rate % Variance - you can sort by Task Number and Task Number by ETC Raw Cost Rate % Variance (average)

Region	Components
Task List	Overview • Task Number • Task Name • Task Manager • Description • Organization • Task Status Details • Task Number • Task Name • Task Manager • Transaction Start • Transaction Finish • Work Type • ETC Source • Receive Inter-Project Invoices • Billable Flag • Chargeable Flag • Capitalize Flag • Task Type • Service Type Actions

Region	Components
	• Task Number • Task Name • Task Manager • Expenditures - click this to navigate to the Expenditure Overview page • Issues - click this to navigate to the Issues page • Change Requests - click this to navigate to the Change Requests page • Change Orders - click this to navigate to the Change Orders page • Update Plans - click this to navigate to the Update Multiple Financial Plans page. You use this to make updates for the tasks on the financial plan. • Add Resource Assignment – User to add resource assignment to the financial plan. **Note:** If you choose an SOV enabled project, then Approved Cost budget, Primary Cost Forecast are not displayed in the Plan Types Table in this page.

Region	Components
Plan Lines	Overview • Task Name • Financial Plan Type • Planning Element: Resource • Version Type • Version Name • Planning Element: UOM • Planning Element: Currency • Planning Element: Start Date • Planning Element: Finish Date Quantity • Task Name • Financial Plan Type • Planning Element: Resource • Version Type • Quantity: Total • Quantity: Current Budget • Quantity: Actual • Quantity: ETC • Quantity: Forecast Raw Cost • Task Name

Region	Components
	• Financial Plan Type • Planning Element: Resource • Version Type • Raw Cost: Total • Raw Cost: Current Budget • Raw Cost: Override Raw Cost • Raw Cost: ETC • Raw Cost: Forecast • Spread Curve Burdened Cost • Task Name • Financial Plan Type • Planning Element: Resource • Version Type • Burdened Cost: Total • Burdened Cost: Current Budget • Burdened Cost: Override Burdened Cost Rate • Burdened Cost: Actual • Burdened Cost: ETC • Burdened Cost: Forecast Revenue

Region	Components
	Note: This column set is not displayed if you choose an SOV Project. • Task Name • Financial Plan Type • Planning Element: Resource • Version Type • Revenue: Total • Revenue: Current Budget • Revenue: Actual • Revenue: Average Bill Rate • Revenue: ETC • Revenue: Forecast • Revenue: ETC Bill Rate • Revenue: Override Bill Rate • Revenue: Variance (%) Current Budget Margin **Note:** This column set is not displayed if you choose an SOV Project. • Task Name • Financial Plan Type • Planning Element: Resource • Version Type

Region	Components
	• Margin: Budget • Margin: Current Budget • Margin (%): Current Budget • Margin: Actual • Margin (%): Actual • Margin: Forecast • Margin (%): Forecast • Margin (%): Variance : Current Budget • Margin (%): Variance : Original Budget Actions • Task Name • Financial Plan Type • Planning Element: Resource • Version Type • Update Plan Line Details - click this to navigate to the Edit Budget Line: Approved Budget window. You can also Print or Export the results of the table.

Expenditure Overview Page

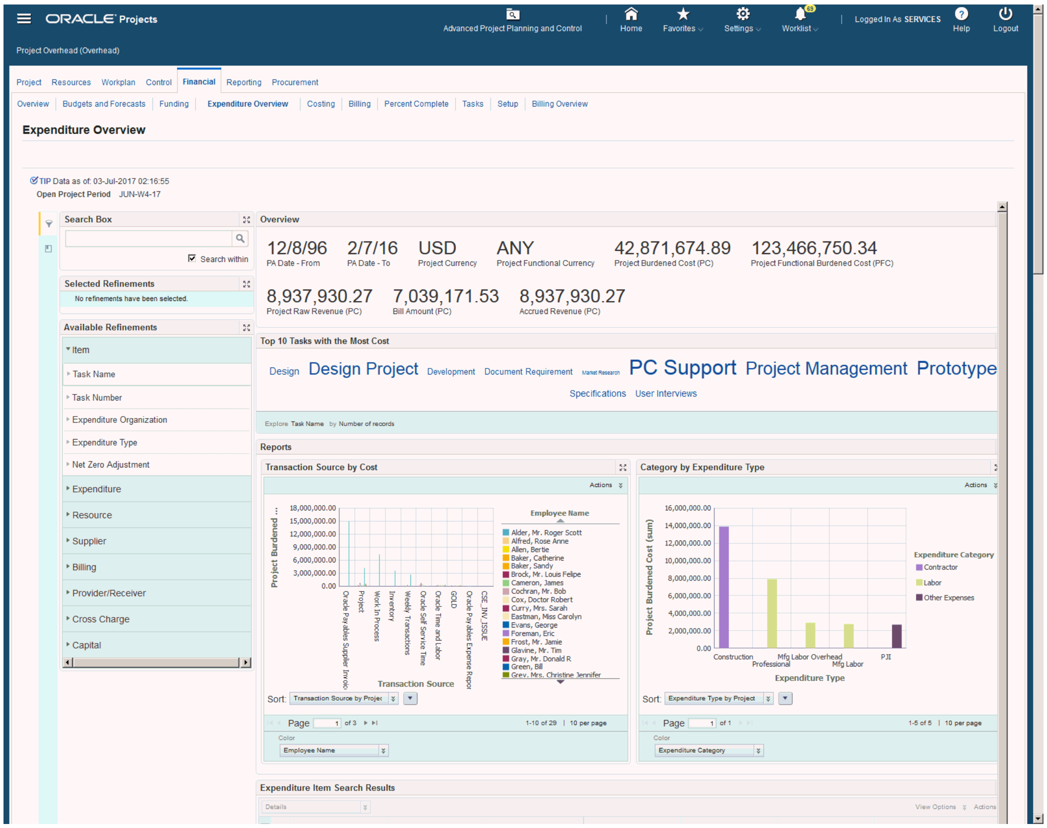
The Endeca Expenditure Overview page displays expense related information on an expense item. The components of the Expenditure Overview page are:

- Expenditure Overview – Displays information on the expenditure item.
- Metrics – Display the top 10 items with the Most Cost.

- Reports – Display expenditure information such as Transaction Source by Cost, Category by Expenditure Type.

- Expenditure Item Search Results – Display detail information about the expense including access to common expense actions or drill-down to expense item detail.

The following graphic displays the Expenditure Overview page.



From the Advanced Project Planning and Control page, click the Expenditures link in the Project Details actions region, to access the Expenditure Overview page.

Region	Components
Tip	Displays the date on which the data was last refreshed.

Region	Components
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Customer • Task Name • Task Number • Task Manager • Resource Name • Resource Class • Employee Name • Supplier Name • PO Number • Receipt Number • Organization • Task ID

Region	Components
	• Invoice Number
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Overview	• PA Date - From • PA Date - To • Project Currency • Project Functional Currency • Project Burdened Cost (PC) • Project Functional Burdened Cost (PFC) • Project Raw Revenue (PC) • Adjusted Revenue (PC) • Bill Amount (PC) • Accrued Revenue (PC)
Top 10 with the Most Cost	Displays the top 10 Transaction Source by Project Burdened Cost (cost incurred) and Expenditure Type by Category.

Region	Components
Reports	• Transaction Source by Cost - you can sort the data by Transaction Source and Transaction Source by Project Burdened Cost (sum) • Category by Expenditure Type - you can sort the data by Expenditure Type and Expenditure Type by Project Burdened Cost (sum)

Region	Components
Expenditure Item Search Results	Column Sets: • Details • Accounting • Billing • Burden • Capital • Cross Charge • Expenditure • Provider • Receiver • Resource • Supplier The details you can view include: • Trans ID • Task Number • Task Name • Expenditure Org • Expenditure Type • Expenditure Category • Employee/Supplier • Item Date • Quantity

Region	Components
	• UOM • Bill Amount • Project Functional Burdened Cost • Project Burdened Cost. • Burden Distributed • Cost Burdened • Cost Distribution Rejection • Cost Distributed • Cost Job • Billed Amount • Billed • Billable • Burdened Cost Rate • Burden Distribution Rejection • Capital Event Number • Capitalizable • Borrowed and Lent Distributed • Cross Charge Processing Method • Adjusted Revenue • Adjusting Item • Provider Operating Unit

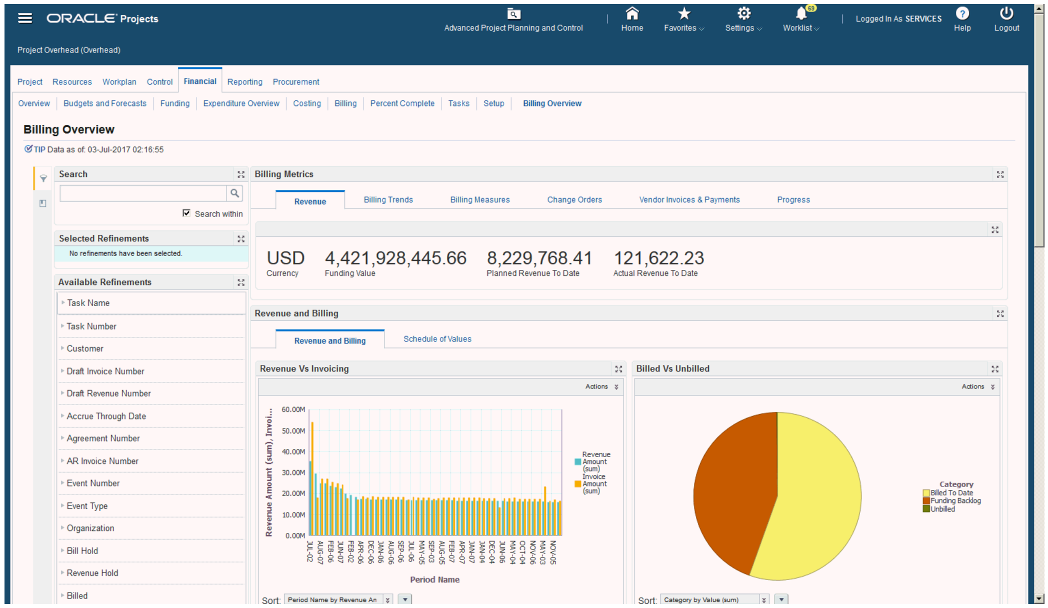
Region	Components
	• Provider Org Name • Receiver Operating Unit • Receiver Org Name • Employee Name • Employee Number • Supplier Name • Supplier Number, and so on.

Billing Overview Page

The Billing Overview page displays billing information for the project. The components of the Billing Overview page are:

- Billing Metrics – Displays the Revenue, Billing Trends, Billing Measures, Change Orders, Vendor Invoices and Payments, and Progress metrics and measures..
- Revenue and Billing - displays charts Revenue vs. Invoicing and Billed vs Unbilled
- Revenue Analysis - displays results in a tabular format in Funding, Revenue Budget, Draft Revenue, and Draft Invoices tabs.
- Events and Expenditure Analysis - displays results in tabular format in Events, Expenditure Item, Change Orders, and Retention tabs.

The following graphic displays the Billing Overview page. To access the Billing Overview page, from the Advanced Project Planning and Control page, click the Billing link in the Project Details actions region.



Region	Components
Tip	Displays date on which data was last refreshed.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Search
Search Within</td><td>The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.

Partial record search is enabled for specific attributes. Attributes for partial record search include:
Bill Group
Customer
Employee Name
Task Manager
Task Number
Task Name
Invoice Number
Organization
PO Number
Receipt Number
Resource Name
Resource Class</td></tr>
</table>

Region	Components
	• Supplier Name
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Task Name • Task Number

Region	Components

Billing Metrics	Displays the following details:
	• Revenue tab - displays the following details:
	  • Currency - Displays Project Functional currency you use to record transactions and maintain accounting data for your ledger. In cross-charge transactions, the functional currency, as defined in the ledger is the currency associated with a project transaction. In this context the currency displayed is applicable for all the metrics related to amount.
	  • Funding Value - Funding is the step that allocates an amount associated with a customer agreement to a specific project. The total amount of allocated project funding is the funding value and it must be equal the current approved project revenue budget amount in order to successfully baseline the project. For SOV projects, this is the SOV Header Amount in Project Functional Currency.
	  • Planned Revenue To Date - displays the revenue that is planned to be achieved from inception to-date. For SOV enabled projects, this value comes from SOV lines.
	  • Actual Revenue To Date - displays the revenue that is achieved or recorded from inception to-date. For SOV projects, the SOV progress till date is Actual Revenue to Date.
	• Billing Trends tab - displays the following details:
	  • Billable/Non Billable Ratio - displays

Region	Components
	the ratio of the cost spent on Billable tasks to Non Billable tasks. A low ratio could signify decreasing profitability. Only work-based events are considered to calculate this. This is not available for SOV projects. • Billed /Unbilled Ratio - this ratio is in context of the billable amount. The ratio is between the billed amount and the unbilled amount (unbilled billable amount). Only work-based events are considered to calculate this. This is not available for SOV projects. • Original Funding Vs Increase Ratio - this is the ratio between the initial and the modified funding amount. Modified funding amount is the resultant of change orders. Ratio is calculated between Current Funding Amount and Original funding Amount. • Billing Cycle - this is the schedule of recurrent times in any regular system of preparing or sending bills. It is measured in terms of days. It is generally number of days between the previous bill generation to the next bill generation. • Average Lead Time-Cut off to Submission - displays the average number of days from the billing cutoff date to the date invoices is submitted to the client. • Average Lead time -Invoice to cash - displays the average number of days from the date, invoices are submitted to the date client has released the payment.

Region	Components
	• Billing Measures tab - displays the following details: • Total Invoice Value to Date - displays the amount invoiced till date from inception is reported in this metric. This metric does not consider invoices in Draft status. Only invoices accepted in receivables are considered. • Accuracy Index - The billing accuracy index is measured based on absolute number of adjustments and corrections. To calculate the billing accuracy, divide the number of correct bills by the total number of bills. Accuracy Index is equal to the Total Invoice value to date minus the Past Due invoice value plus the Hold/Reject value divided by the Total Invoice value to date. • Bill Hold Value - displays the total value of any billable items that are not accepted by the client (which are kept under bill hold or rejected from the invoice). These values are taken from the credit memo issued. This is not available for SOV projects. • Past due Invoice Value - displays the cumulative value of the invoices which are past due to the payment date is presented in this metric. The criteria to arrive at the metric is due date on the invoice should be less than the system date. • Average Lead time -Invoice to cash - displays the average number of days from the date, invoices are submitted to the date client has released the payment.

Region	Components
	• Change Orders tab - displays the following details: • Change Orders Approved - displays the total value of the approved change orders ITD. • Change Orders Pending Approval - displays the total value of change orders which are Pending Approval status till date. • Change Orders Pending Implementation - displays the total amount of approved change orders which are not yet implemented is provided by this metric. • Open Change Orders - displays the total value of change orders which are in open status till date. • Change Orders Success Ratio - displays the ratio between the total amounts of approved change orders to the total amount of all change orders raised. It is calculated as the Total amount of approved change orders divided by the Total amount of all change orders. • Vendor Invoices and Payments tab - displays the following details: • Vendor Invoices To-Date - displays the sum total of the amounts pertaining to all vendor invoices till date. • Non Billable Supplier Invoices - displays the total value of supplier invoices against non billable items / tasks.This is not displayed for SOV projects.

Region	Components
	- Vendor Invoice Vs Client Billing - displays the ratio between the vendor's invoice amount ITD to the client invoice amount ITD is mentioned in this metric. It is calculated as Vendor Invoice amount ITD divided by the Client invoice amount ITD. - Vendor Payment Index - presents us with the efficiency of our paying cycle to the vendor, based on the payments made by due date. It is calculated as dividing Total past due amount/Total Invoice amount. Where, Past Due amount = If Invoice due date is lesser than system date, then (Total Invoice Amount – Total amount paid). - Vendor Payments due this Period - displays the total amount of vendor invoices that are due in the current GL period. - Vendor Payments Past Due - displays the total value of vendor invoices that are not paid as per the committed payment due date. Reference to Past Due vendor payments is in accordance with current system date. - Progress tab - displays the following details: - Progress on Expenditures - displays an insight of the potential revenue that can be incurred from the expenditures. It is the sum total of billable and unbilled billable amount. Only work- based events are considered to calculate this. This is not displayed for SOV projects.

Region	Components
	• Work in Progress (Unbilled) - displays the Work in Progress that is the expenditure charged but not billed due various reasons. Only work-based events are considered to calculate this. For SOV projects, Work in Progress is calculated as Total Progressed Amount - Total Billed Amount. • Progress Reported Till-Date - displays the progress /quantity of work completed against all tasks/SOV lines till date.
Revenue and Billing	Displays the following details: • Revenue vs. Invoicing - is a bar chart that displays periodic revenue and the invoicing trends across the periods. The graph is depicted with time period in months on X-axis and Amount on Y – Axis. The chart contains dual Y axis to accommodate monthly values and the cumulative values as well. Bars represent monthly values and the lines represent Cumulative values. • Billed vs Unbilled - displays a pie chart that explains how much amount is billed and unbilled (expenditures already booked / progress made but not billed) vs. the balance billing amount. The total circle represents the funding value and each pie represents Billed, Unbilled & Balance respectively. Draft Invoices are considered for billed amount. All the values displayed in this chart represent values excluding tax i.e. Billed To Date value displayed on the pie chart is Invoice Lines value of the Billing Summary page. The Invoiced Total available on Billing Summary page includes tax amount which is not displayed in this pie chart.

Region	Components
Schedule of Values	Displays the following details: • Progress Vs WIP Vs Billing - is a bar chart that explains how billing happened versus the progress recorded. The values are represented in amounts for this chart.

Region	Components
Revenue Analysis	Displays the following details: • Funding tab - displays details such as Customer, Agreement Number, Task Name, Task Number, Total Unbaselined Amount, Total Baselined Amount, Retention-Withheld, Retention-Billed, Billing Sequence, Total Funding, Net Revenue, Revenue Write-Off, and Invoiced Amount • Revenue Budget tab - displays details such as Task Number, Task Name, At Completion Approved Revenue Budget, Planned Revenue to Date, Actual Revenue to Date, Variation, Planned %, and Actual %, • Draft Revenue tab - This has two views - Summary and Details displaying details such as Customer, ITD Accrued Amount, Current Period Accrued Amount, Last Draft Revenue Number, and Last Accrue Through Date. • Draft Invoice tab - This has two views - Summary and Details and displays details such as Customer, Invoice Amount, Current Period Invoiced Amount, Receipt Amount, Current Period Receipt Amount, Outstanding Amount, Retention Amount, Last Invoice Number, Last AR Invoice Number, and Last Invoice Date. • Schedule of Values tab - this displays SOV Line Number, SOV Description, UOM, Rate, Total Planned Quantity, Total Planned Revenue Amount, Till Current Period Billed Quantity, and Till Current Period Billed Amount. You can print or export any of these results. You can also use the Actions menu to Compare by selecting two or more rows.

Region	Components
Events and Expenditure Analysis	Displays the following details: • Events tab - displays details such as Event Number, Task Name, Task Number, Billed, Event Type, Organization, Description, Currency, Revenue Amount, On Hold Bill Amount, Unbilled Amount, On Hold Revenue Amount, Bill Hold, Revenue Hold, Bill Group, and Bill Amount • Expenditure Item tab - displays details such as Task Name, Task Number, Billable Expenditure Cost, Non-billable Expenditure Cost, Billable Billed Amount, and Billable Unbilled Amount. • Change Orders tab - displays details such as Name, Summary, Task Name, Task Number, Owner, Priority, Progress Status, Days Until Due, Days Since Updated, and Open Actions. • Retention tab - displays details such as Customer, Agreement Number, task Name, Task Number, Withheld Amount, and Total Billed. You can print or export any of these results.

Oracle Advanced Project Planning and Control Plus Product Configuration

Oracle Advanced Project Planning and Control Plus Product Configuration

Once you have completed installation and common configurations as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), you must complete the Oracle Advanced Project Planning and Control Plus product configuration setup.

See: Setting Up Oracle Advanced Project Planning and Control Plus Integration, page 3-67

Setting up Oracle Advanced Project Planning and Control Plus Integration

To set up Oracle Advanced Project Planning and Control Plus integration, complete the following steps:

1. Enable JSP compilation post installation.

   > **Note:** If this is not done, then the integration between Oracle Advanced Project Planning and Control pages and the Oracle Applications framework pages will not work as expected.

   See: *How to Enable Automatic Compilation of JSP pages in R12 Environment* Document ID: 458338.1.

2. Grant the Projects Endeca Access Role (UMX|PJT_ENDECA_ACCESS_ROLE) to the predefined Projects responsibility Project Super User (FND_RESP|PA|PA_PRM_PROJ_SU|STANDARD). You can also grant the Projects Endeca Access Role to any custom Oracle Projects responsibility. You can access the Oracle Advanced Project Planning and Control Plus pages once you add the predefined role Projects Endeca Access Role to the Project Super User Responsibility responsibility (PA_PRM_PROJ_SU).

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

3. Review the Projects Integration Security.

   See: Projects Integration Security, page 20-31

4. Set up the PA: Expenditure Data Load Start Date Profile Option to determine the list of expenditure items to be loaded. All expenditure items on or after this date

would be loaded in Endeca. Ensure you set the value in the canonical date format (example: 2010/01/01).

5. Set up the PA:Project Monitoring and Control Transactional Data Load (YYYY/MM/DD) profile option to determine the date from which transactional data should be extracted for viewing in the Project Monitoring and Controls Command Centre.

6. Optionally, run the Summarization processes.

   Note: You need to run this process only if the cost numbers do not match the amounts on the Workplan page.

   See: Performance and Exceptions Reporting Programs, *Oracle Projects Fundamentals* for more details.

7. Schedule the set up for Full Endeca Refresh.

   See: Setting Up Scheduler to Load Full Graphs, page 3-69

8. Schedule the set up for Incremental Endeca Refresh.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 3-70

Advanced Projects Planning and Control Plus Integration Security

The Advanced Projects Planning and Control Plus Security is based on the following criteria:

> **Note:** If the Project uses a Workplan or Financial Plan - Budget or Forecast with Time Phase as None, then such Projects are not displayed in any of the Projects Dashboards. Program enabled Projects & SOV projects are also restricted.

- Role Based Access Control(RBAC) set up for Oracle Information Discovery is done.
- Ensure that the user has access to at least one Projects Responsibility.
- Ensure the user is part of a Projects Party associated with the project as a Key Member on Project i.e. - Planned resources, Task Managers, or Project Mangers.
- Ensure that the Cross Org Update Profile set to Yes.
- Ensure the Org Authority is set up.
- Ensure access to the following function securities are in place:

- PA_VIEW_WORKPLAN
- PA_TASKS_UPDATE_DETAILS
- PA_PAXPREPR_OPT_MAINT_VERSIONS

- Ensure PA_ENDECA_USER_ACCESS_PRIVS_V is available.

Setting Up the Scheduler to Load Full Graphs

You run the Full Load graph regularly to ensure that delete records are purged from the Endeca MDEX Server. It is recommended that you run the Full Load graph at least once as week. You can run it more frequently if required.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Projects Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select prj-pjt or prj-pmc from the Sandbox list.
13. Select graph/Full.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler to Load Incremental Graphs

You set up the Scheduler to load incremental graphs depending on when you update project information. For example, if you update project information frequently, you might choose to set the scheduler to load the incremental graph once in every 3 hours, or, if you do not update project information too frequently, you can set the scheduler to run once in a day.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Projects Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select prj-pjt or prj-pmc from the Sandbox list.
13. Select graph/Incremental.grf from the Graph list.
14. Click Create to set the scheduler.

Views and Joins to Load and Display Oracle Advanced Project Planning and Control Plus Data

The following views are used by the ETL layer in Endeca to load and display Oracle Advanced Project Planning and Control Plus data to the Endeca data store:

- PA_ENDECA_WORKPLAN_STRUCTURES - Displays data at structural level for all structure versions under a project.

- PA_ENDECA_WORKPLAN_VIEW - Denormalized view at the granular level of a task version. Includes info about project/structure and tasks. This is only for Structures (CWV,LPV and Baselined).
- PA_ENDECA_WORKPLAN_ASGN_VIEW - Denormalized View at the granular level of a resource assignment including information about assignments. This is only for Structures (CWV,LPV and Baselined).
- PA_ENDECA_FINPLAN_VIEW - This view provides the list of financial plan at the level of plan line information.
- PA_ENDECA_EXPENDITEMS_V - This view provides the list of Expenditure Items.
- PA_ENDECA_USER_ACCESS_PRIVS_V - This view determines the list of projects to which the currently logged in user has access.

4

Oracle Channel Revenue Information Discovery Plus

This chapter covers the following topics:

Overview

Oracle Channel Revenue Information Discovery Plus integrations enable you to search and filter claim and budget related information.

You can search using Oracle Channel Revenue Information Discovery Plus pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from container pages in EBS. The Claims Dashboard page enables search functions using Endeca Information Discovery integration. This enables you to filter and search for open and closed claims. The Budget Dashboard page enables you to track funds and related promotional activity transactions to forecast and execute various promotional activities to get maximum return on investments.

Oracle Channel Revenue Information Discovery Plus User Interface and Integration

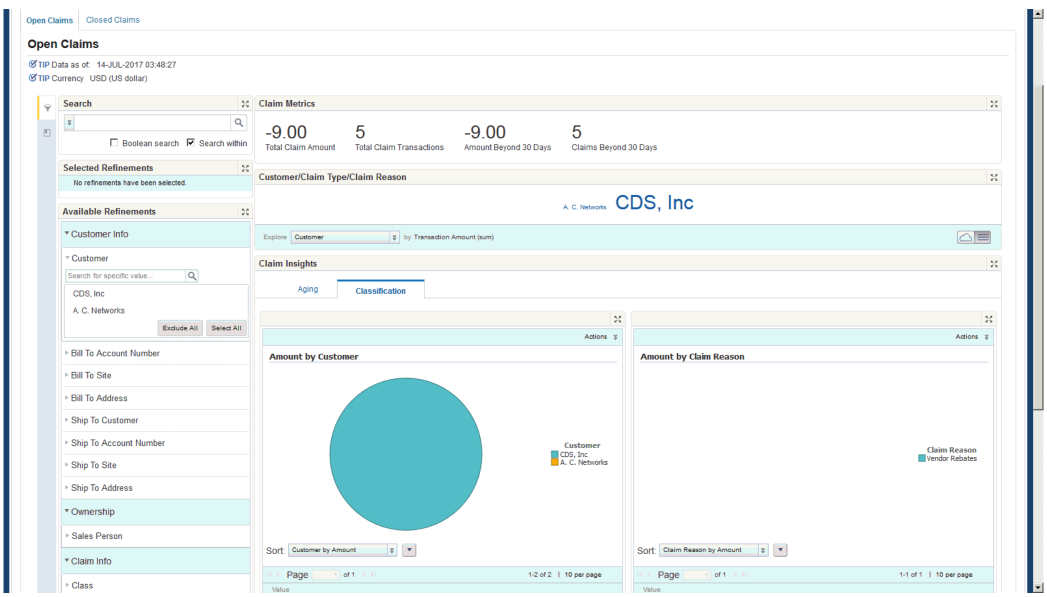
Claims Dashboard Page

You use the Claims Dashboard to view Open and Closed Claims.

The Claims Dashboard contains two tabs - Open Claims and Closed Claims. Both these tabs contain filtering components that you can use to search, navigate and filter the data displayed in other components.

Open Claims Tab

You use the Open Claims page to track claim closure workload and amounts or transactions that require to be closed in a timely manner. You can use this page to view the open claims by age and personnel. Any claim with a status NEW, OPEN, ON_HOLD, and COMPLETE is an open claim. You can analyze data and review open claims using various metrics, charts, graphs, and tables. The Open Claims page contains the following regions and components:



Region	Components
Tip	Displays the date on which the last full load was run.

Region	Components
Currency	Displays the claim currency.

Region	Components
Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Claim Type • Claim Reason • Customer Reason • Claim Number • Customer Reference Number • Customer Name • Customer Bill to Account Number • Customer Bill to Site • Customer Bill to Address • Claim Owner • Sales Person • Claim Status

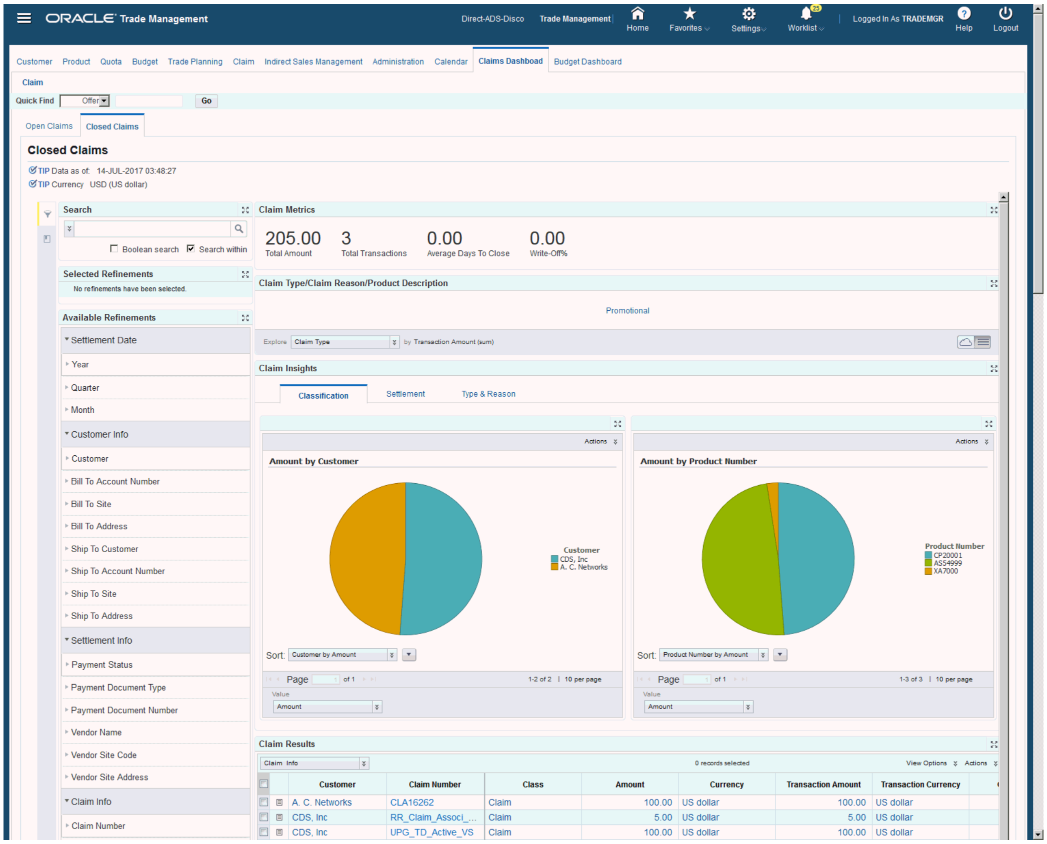
Region	Components
	• Operating Unit • Product Description • Vendor Name
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Operating Unit • Claim Date • Customer Info • Ownership • Claim Info
Claim Metrics	• Total Claim Amount • Total Claim Transactions • Amount Beyond 30 Days • Claims Beyond 30 Days

Region	Components
Customer/Claim Type/Claim Reason	This tag cloud displays the distribution of text values for the attribute Customer.
Claim Insights	The Aging tab displays information in a chart format for Amount, Transactions by Owner, and Age. You can further refine your results using the Owner, Owner by Amount, and Owner by Transactions sort options. Actions you can perform on this tab are Export, Print and Save as Image. The Classifications tab consists of the Amount by Customer and Amount by Claim Reasons charts. The Amount by Customer chart displays information that you can refine further using the Customer and Customer by Amount sort options. You can view the chart in terms of Amount or Transactions. The Amount by Claims Reasons chart displays information that you can further refine using the Claim Reason and Claim Reason by Amount sort options. You can view the chart in terms of Amount or Transactions.

Region	Components
Claim Results	This component displays a detailed view of records for the current refinement. You can view the following claims related attributes and access and view multiple data points by scrolling through the results table horizontally. • Claim Info • Settlement Info • Customer • Product Info • Ownership • Flexfield You can use the View options to Hide/Show columns, Sort, and Reset table to defaults. Additionally, you can use the Actions list of values to Print, Export, Compare or Mass Update this data. To complete the Compare or Mass Update actions, you must select two or more lines.

Closed Claims Tab

This page provides a means to analyze claims after they are settled. The page also displays details regarding the claim settlement. All claims with a status PENDING_APPROVAL, APPROVED, PENDING_CLOSE, CLOSED, and ARCHIVED are considered closed claims. Claims with a status CANCELED, DUPLICATE, and REJECTED are not extracted for reporting on this page. You can analyze data and review closed claims using various metrics, charts, graphs, and tables. The Closed Claims page contains the following regions and components:



Region	Components
Tip	Displays the date on which the last full load was run.
Currency	Displays the claim currency.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Search
Boolean Search
Search within</td><td>The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.

Partial record search is enabled for specific attributes. Attributes for partial record search include:
Claim Type
Claim Reason
Customer Reason
Claim Number
Customer Reference Number
Customer Name
Customer Bill to Account Number
Customer Bill to Site
Customer Bill to Address
Claim Owner
Sales Person
Claim Status</td></tr>
</table>

Region	Components
	• Operating Unit • Product Description • Vendor Name
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Operating Unit • Settlement Date • Customer Info • Settlement Info • Claim Info • Ownership • Product Info

Region	Components
Claim Metrics	• Total Amount • Total Transactions • Average Days to Close • Write-Off%
Claim Type/ Claim Reason/Product Description	This tag cloud displays the distribution of text values for the Claim Reason.

Region	Components
Claim Insights	You can view closed claims by Classifications, Settlement, or Type & Reason. In the Classifications tab, you can view: • Amount by Customer - you can further refine the results using the Customer and Customer by Amount sort options. You can view the chart in terms of Amount or Transactions. • Amount by Product Number - you can further refine the results using the Product Number and Product Number by Amount sort options. You can view the chart in terms of Amount or Transactions. In the Settlement tab, you can view: • Amount by Settlement Method - you can further refine the results using the Settlement Amount or Settlement Method by Amount sort options. You can view the chart in terms of Amount or Transactions. • Average Days to Close - you can further refine the results using the Owner or Owner by Average Days to Close sort options. You can view the chart in terms of Amount or Transactions. In the Type & Reason tab, you can view: • Amount by Claim Type - you can further refine the results using the Claim Type or the Claim Type by Amount sort options. Additionally, you can view the chart in terms of Amounts or Transactions as the Value and Claim Type and Classification as the Color. • Amount by Claim Reason - you can further refine the results using the Claim Reason or the Claim Reason by Amount sort options. Additionally, you can view

Region	Components
	the chart in terms of Amount or Transactions as the Value. You can also print, export, or save the image for these visualizations.
Claim Results	This component displays a detailed view of records for the current refinement. You can view the following claims related attributes and access and view multiple data points by scrolling through the results table horizontally. • Claim Info • Settlement Info • Customer • Product Info • Ownership • Flexfield Click any of the links to refine the search results further on the selected value. Additionally, you can use the Actions list of values to print, export, or compare this data. To compare data, ensure you select two or more lines.

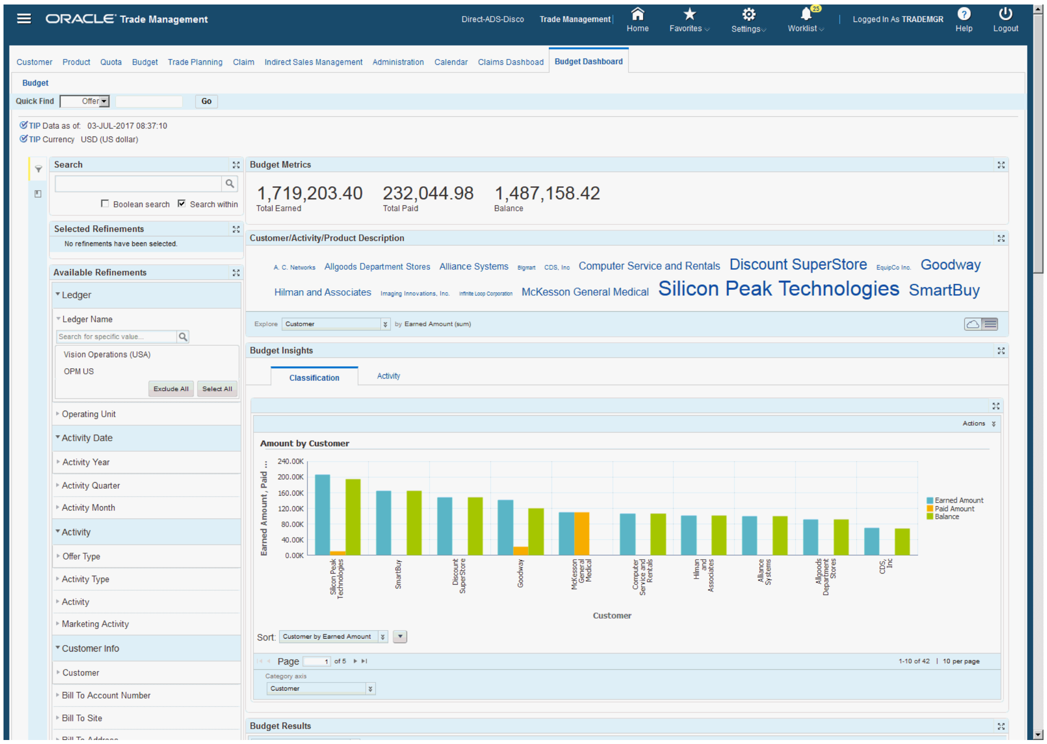
Budget Dashboard Page

You use the Budget Dashboard page to track funds and their related promotional activity transactions to forecast and execute various promotional activities to get maximum return on investments. The page displays information and data graphically, and in tabular format, for all budgets other than those with a Draft, Rejected, or Pending status.

> **Note:** The budget dashboard displays only those budgets that have an activity and exclude those budgets that may be active but have no

accruals generated yet.

This page contains filtering components that you can use to search, navigate and filter the data displayed in other components. You can analyze data and review budget data using various metrics, charts, graphs, and tables. The Budget Dashboard page contains the following regions and components:



Region	Components
Quick Find	Use this to quickly search for an Offer, Claim, Budget, or Price List.
Tip	Displays the date when the data was last refreshed.
Currency	Displays the currency associated with the budget.

Region	Components
Search • Boolean • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Budget Name • Budget Owner • Budget Category • Ledger • Budget Currency • Operating Unit • Offer Type • Activity/Offer Name • Marketing Activity • Customer Name • Customer Bill to Account Number • Customer Bill to Site

Region	Components
	• Customer Bill to Address • Product Number • Product Description
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Ledger • Activity Date • Activity • Customer Info • Product Info • Other Information
Budget Metrics	• Total Earned • Total Paid • Balance

Region	Components
Customer/Activity/Product Description	This tag cloud displays the distribution of text values for the attribute Customer, Activity, or Product Description.
Budget Insights	Classification - you can further refine the results using the Customer, Customer by Earned Amount, Customer by Paid Amount, and the Customer by Balance sort options. Additionally, you can change the display using the Customer or Product Number as the Category Axis. Activity - the Amount by Activity chart displays information that you can further refine using the Activity or Activity by Earned Amount sort options. You can view the results in terms of Earned Amount or Paid Amount as the Value, or Activity, Activity Type, Offer Type, or Marketing Activity as the Color. The Amount by Category chart displays information that you can further refine using the Category or Category by Earned Amount sort options. You can view the results in terms of Earned Amount or Paid Amount as the Value. You can also print, export, or save the image of these visualizations.

Region	Components

Budget Results	This component displays a detailed view of records for the current refinement. You can view the following budget related attributes, and access and view multiple data points by scrolling through the results table horizontally.
	• Column Set: Amount
	  • Budget Name
	  • Activity
	  • Customer
	  • Earned Amount
	  • Paid Amount
	  • Budget Currency
	• Column Set: Eligibility
	  • Budget Name
	  • Activity
	  • Bill To Customer
	  • Bill To Account Number
	  • Bill To Site
	  • Bill To Address
	  • Ship To Customer
	  • Ship To Account Number
	  • Ship To Site
	  • Ship To Address

Region	Components
	- Beneficiary Name - Beneficiary Account Number • Column Set: Other Information - Budget Name - Activity - Ledger Name - Operating Unit - Budget Category - Budget Owner - Budget Status Click any of the links to refine results further based on the selected value. Additionally, you can use the Actions list of values to print, export, or compare this data. To compare data, ensure you select two or more lines.

Oracle Channel Revenue Information Discovery Plus Product Configuration

Overview

Complete the Oracle Channel Revenue Information Discovery Plus product configuration after the installation and common configurations are completed as described in the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1).

Set up Oracle Channel Revenue Information Discovery Plus Integration

1. Grant the Channel Endeca User Role to the predefined Oracle Trade Management User or Accounts Receivable Deductions and Settlement responsibilities. You can also grant the Channel Endeca User Role to any custom Oracle Channel Revenue Manager responsibility.

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: Menus and Functions in Oracle Channel Revenue Information Discovery Plus, page 4-22

2. Set up the Profile Options.

   See: Setting Up Oracle Channel Revenue Information Discovery Plus Profile Options, page 4-21

3. Run the Full Load Graph.

   See: Running the Full Load Graph, page 4-22

4. Set up the Scheduler.

   See: Setting Up the Scheduler for Incremental Refresh, page 4-23

5. Run the Update Time Structure concurrent program. You must run the Update Time Structure concurrent program to collect claim data for the Endeca Dashboard. During the data extraction process, claims data is loaded with time structure information maintained in Channel Revenue Management. Only claims with their claim date and settlement date defined in the mentioned time structure are collected.

   See: Updating the Time Structure in *Oracle Channel Revenue Management, Implementation and Administration Guide* for more information.

6. Optionally, configure a Descriptive Flexfield. User-configurable attributes include:

   - Claims for Claims Dashboard

   - Budgets for Budget Dashboard

   The enabled attributes of the descriptive flexfields (DFF) Claims and Budgets automatically display within the guided navigation portlet under the group Claims on the Claims Dashboard and Budgets in the Budgets Dashboard. You can refine each of the attributes with specific search and selection requirements.

   By default, when a new Descriptive Flexfield definition has been made, the Descriptive Flexfield details will be available pulled in after ETL process completes. The Descriptive Flexfield will be available in the Claims and Budgets Guided Navigation components respectively, and not in Result Table component. In order to add the Descriptive Flexfield to Result Table component, administrators can configure the Result Table component to add Descriptive Flexfields as a new Column Group in the Result Table. The individual Context and Segments can also be added to existing Column Group of the Result Table component like Claim Info. By default, the Descriptive Flexfield in the Result Table displays the concatenated value of the Descriptive Flexfield. You can choose to show or hide this as required.

Setting Up Oracle Channel Revenue Information Discovery Plus Profile Options

Set up the following profile options for Oracle Channel Revenue Information Discovery Plus:

- **OZF: Claims Aging Bucket for Endeca** - Open Claims are age bucketed based on their age at the time of data collection. The age bucket defined in Accounts Receivables is used as the bucket range reference. This profile is enabled at the site level and specifies the bucket definition that is to be used in Channel Revenue Management. You must perform a Full Data load when this profile option changes.

- **OZF: Common Currency for Trade Management** - Based on Security Profile of the user viewing Endeca Dashboard, the application reports Claim and Budget data across Operating Units. This profile option determines the common currency that the Endeca Dashboard data uses to represent data. If the profile option is not specified, then the functional currency for the claim's Operating Unit is used.

- **OZF: Endeca Full Data Load Period in Years** - During full data load run, the application collects claim data for a specified time period with respect to the current run time and to filter Closed, Cancelled and Archived Budget records. Use this profile option to specify the period, in number of years, at the site level.

- **OZF : Claim Access Security** - Use this profile option to determine whether users navigating from Endeca to the claims page have read only, or, read and update access for claims.

Menus and Functions in Oracle Channel Revenue Information Discovery Plus

The Oracle Channel Revenue Information Discovery Plus Application is accessed through the following functions:

- OZF_CLAM_ENDECA_OVER - contains the Endeca dashboard contents
- OZF_OPEN_ENDECA_PAGE - maps to the Open Claims Page of Endeca Dashboard
- OZF_CLOSED_ENDECA_PAGE - maps to the Closed Claims Page of Endeca Dashboard
- OZF_ENDECA_CLAM_REDIRECT - landing page from Endeca to Transaction application
- OZF_BUDGET_ENDECA_PAGE - contains the Endeca Budget Dashboard contents

To access the pages for Oracle Channel Revenue Information Discovery Plus, grant the Channel Endeca User Role to users, who require access to Endeca content. Users with this role can access the Endeca Dashboard menu from the following responsibilities.

- Oracle Trade Management User
- Accounts Receivable Deductions and Settlement

The Endeca Dashboard (OZF_ENDECA_MENU) menu is associated with the Channel Endeca User Role.

Running the Full Load Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

- Status Change of Claims: Claim data that move from Open status to Closed or from a Closed to Open status or when claim moves to other statuses like Rejected, Duplicate, or Cancelled, such records are soft deleted during incremental runs. Such soft deleted records are purged during Full Data load. Full load of claim data is suggested to be run on a weekly basis to purge such records.
- Claims with Settlement date in the Current Year: At the change of the calendar year,

Full Data load is to be performed. During ETL run, closed Claim data are that have been settled during the current year are identified. Claims settled in the current year are rendered by the default refinement applied on Closed Claims page. If full load is not run on the change of calendar year, the reporting on current year will not be accurate.

You must also ensure you run the Full graph each time you update the OZF: Claims Aging Bucket for Endeca profile option.

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Channel Revenue Management Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select ozf-claim or ozf-budget from the Sandbox list, based on the module for which you are running the full load.
13. Select graph/FullLoad.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler for Incremental Refresh

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), initial data load for Channel Revenue Management is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the amount of claims or budget information requiring update.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Channel Revenue Management Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select ozf-claim or ozf-budget from the Sandbox list, based on the module for which you are running the incremental load.
13. Select graph/IncrementalLoad.grf from the Graph list.
14. Click Create to set the scheduler.

Technical Integration Components

View and Joins to Load Oracle Channel Revenue Management Data

The following views are used by the ETL layer in Endeca to load and display Oracle Channel Revenue Management Information Discovery Plus data to the Oracle Endeca data store:

- OZF_ED_F_OPEN_CLAIMS_V - View to extract Open Claims Data for full data load.
- OZF_ED_F_CLOSE_CLAIMS_V - View to extract Closed Claims data for full data load.
- OZF_ED_I_OPEN_CLAIMS_V - View to extract Open Claims data for incremental data load.
- OZF_ED_I_CLOSE_CLAIMS_V - View to extract Closed Claims data for Incremental data load.
- OZF_ED_DEL_OPEN_CLAIMS_V - View to extract Claim data that needs to be soft deleted from the current set of Open Claims in MDEX.
- OZF_ED_DEL_CLOSE_CLAIMS_V - View to extract Claim data that needs to be soft deleted from the current set of Closed Claims in MDEX.
- OZF_ED_F_BUDGETS_V - View to extract Budgets data for full data load.
- OZF_ED_I_BUDGETS_V - View to extract Budgets data for incremental data load.

5

Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus

Overview

Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus enables you to search and filter data to increase performance monitoring, reduce maintenance downtime, and improve maintenance quality. Using Complex Maintenance, Repair & Overhaul Information Discovery Plus dashboards, you can leverage the search and filter capabilities to analyze open and historical transactions, oversee performance rates threshold, improve maintenance troubleshooting, monitor resources and material shortfalls, monitor line maintenance on dispatch, reduce maintenance turn-around time, manage items warranty and claims, monitor top items material transactions, and oversee maintenance discrepancies.

Oracle Complex Maintenance and Overhaul Information Discovery Plus provides variety of value propositions, which could be grouped into below business lines:

- Performing Maintenance Safety, on Budget and on time: One of the main challenge aviation industries are facing nowadays is the ability to A. Accomplishing Maintenance following Aeronautical Authorities Regulations B. Track maintenance parameters impacting performances factors C. Compare such maintenance parameters against historical data D. identify shortfall relative to resources, materials, maintenance training, facilities and E. Provide accountability on maintenance repair timeline. Most of the answer to these constrains are somewhere stored on cMRO EBS, however these data certainly are not provided into a user friendly interfaces, hence users have to deal over 80 percent of the time within numbers of UI navigation reports and interfaces into sort of reactive mode instead of proactively coordinate the efforts into committed milestones and goals. So having and fully contextually graphical application such as Complex MRO information Discovery would certainly provide a better insight tool to get suitable decisions.

- Aircraft Operational Monitoring: When it comes to Line maintenance, a relevant stream to look at would be the daily operations performance. we have noticed here that customer are leaning of flying comfortable, within excel on board service and be ON TIME dispatched. Mostlilely, the on time dispatches are tied to A. operation environment such as Air traffic controls, weather conditions, airport hubs logistic and so on, and B. Maintenance issues that would come out of the daily environment operations. Unlikely, It is fare to say that areas of opportunities of the first one are less in comparison to the Maintenance performance. The Maintenance Director would need to handle a handful number of issues to minimize the flight delays / cancellations due to maintenance operation. Hence the challenge here is to provide a comprehended user interface solution which would account for watch items, critical Non Routines, AOG work orders. This combined tool will certainly reduce the maintenance impact into a daily operation environment. Further more about this topic, historical analysis are also a central piece of the equation to detect background information relative to some issues, Current delay or cancellation might be having historical sources that were overlooked or were not carried on properly. These historical trends and actual behave can be compared side by side in order to provide a better analytic tool on solving such issues.

- Maintenance Performance Factor: Maintenance analysis are performed over times need to be overseen, data could be breakdown by fleet type, Aircraft age, operational environment or any sort of common factor, bottom line her is to identify trends or common behaves and set up metrics to be compared with aviation standards and/or operational experiences. Alerting system should be set up to notify user over abnormal behaves also. Finally these events need to be further evaluate to whether or not maintenance program thresholds and procedures should be updated.

You can search using Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus and Endeca Information Discovery (EID) design tools.

Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus User Interface

Dashboards

The Complex Maintenance, Repair & Overhaul Dashboards enable you to view data and perform activities based on the responsibility assigned to you.

Complex MRO Head of Maintenance - The head of maintenance is typically responsible for all the maintenance departments in an organization. Typically the head of maintenance needs information about the performance of their maintenance organization from a perspective of cost and time. Factors affecting these parameters are materials and resources. In order to analyze the performance and figuring out where there are problem areas or room for improvement, the head of maintenance needs to be able to slice and dice the information and look at the data from various angles. The segregation by equipment type such as aircraft type, engine type or even fleet classification is of great importance. Large organizations have the requirement to break down the information also by geographical location and maintenance departments such as heavy maintenance, line-maintenance, engine shop and component shop. The CMRO Head of Maintenance responsibility provides you relevant information about these parameters via the Non-routines, Visit, Warranty, and Organization Map tabs in the Complex MRO Head of Maintenance Dashboard.

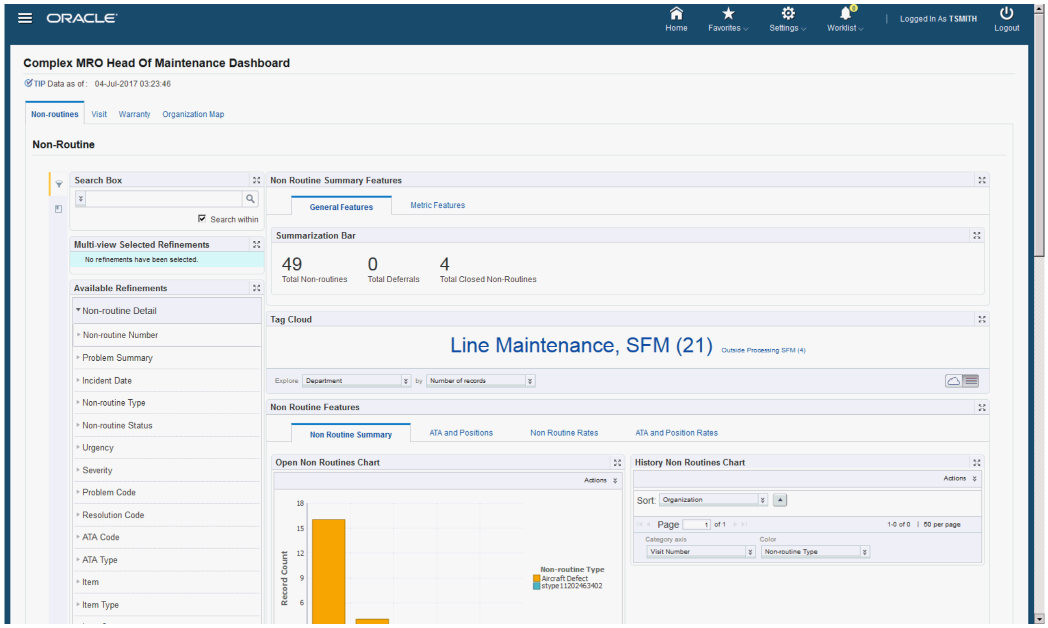
Complex MRO Complex Assembly Director - The CMRO Complex Assembly Director is responsible for the induction, repair or rebuild, and return to service of complex assemblies in a shop environment. The complex assemblies are most commonly engines, but other multi level assemblies can also be serviced. This role needs to monitor turn-around times on multiple complex assemblies simultaneously, and these can be internally or externally owned (customer) engines. The Assembly Director makes decisions to support complex assembly repair volumes, keep supply and demand balanced, monitor completion dates and commitments, and oversees resource capacities. Planned and unplanned maintenance along with overall repair metrics are also valuable information to enable this role to make important decisions. This role may also coordinate with the other directors within the business, including the MCC Director, Heavy Maintenance Director, and the other shop directors. This role usually reports up to the Head of Maintenance. The CMRO Complex Assembly Director responsibility enables you to action items by providing you relevant information via the Non-routines, Visit, Warranty, Material Transactions, and Quality Results tabs.

Complex MRO Line Maintenance Director - The Complex MRO Line Maintenance Director is responsible for overseeing the day-to-day maintenance activities for aircraft that are on duty and following a published flight schedule. Tasks mainly include planning and monitoring transit and overnight visits along with all unscheduled maintenance activities. The director is responsible to coordinate the release of all aircraft to their next flights, considering airworthiness regulations, safety conditions, and upcoming required maintenance in order to fulfill itineraries and expected performance. This role can monitor and make decisions regarding detailed logbook entries and troubleshooting, on-board system messages, as well as line maintenance inspections and airport policies. Additionally, this role must operate in tight communication among the central tower, operational dispatches, and other directors within the airline business. This role usually reports up to the Head of Maintenance. The CMRO Line Maintenance Director responsibility enables you to action items by providing you relevant information via the Non-routines, Visit, Warranty, Material Transactions, Organization Map, and Quality Results tabs.

Complex MRO Heavy Maintenance Director - The Complex MRO Heavy Maintenance Director is responsible for maintenance during the downtime of aircraft at specific maintenance facilities. Heavy checks, such as C and D checks, are the most common activities this role oversees. The director will coordinate and approve these Checks to make sure all maintenance is performed within the agreed work scope and timeframe, assuring the aircraft are returned to service and delivered as planned within the airline operations schedule. This role will also coordinate with the other directors within the business, including the MCC Director and the other shop directors. This role usually reports up to the Head of Maintenance. The CMRO Heavy Maintenance Director responsibility enables you to action items by providing you relevant information via the Non-routines, Visit, Warranty, Material Transactions, Organization Map, and Quality Results tabs.

Complex MRO Component Shop Director: The Complex MRO Component Shop Director is responsible for the induction, repair or rebuild, and return to service of components in a shop environment. The components are most commonly simple assemblies that are repaired in batches with other like parts, and can either be serialized or not. This role needs to monitor turn-around times on parts, and these can be internally or externally owned (customer) parts. He / She makes decisions to support component volumes, keep supply and demand balanced, monitor completion dates and commitments, and oversees resource capacities. Planned and unplanned maintenance along with overall repair metrics are also valuable information to enable this role to make important decisions. This role may also coordinate with the other directors within the business, including the MCC Director, Heavy Maintenance Director, and the other shop directors. This role usually reports up to the Head of Maintenance. The CMRO Component Shop Director responsibility enables you to action items by providing you relevant information via the Non-routines, Repair Batch, Warranty, Material Transactions, and Quality Results tabs.

Using the responsibility assigned to you, you can analyze data using various metrics, charts, graphs, and tables. The Dashboards contains the following regions and components:



Region	Components
Search • Search Within	The Advanced Search component includes value search, record search, wildcard search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Tip	Tip displaying local currency.

Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list. Complex Maintenance Repair and Overhaul Information Discovery provides another component named multi-select refinements instead of the simple select refinement. What this component has as advantage from the simple select refinements is that on the Multi select refinements the system search for the entered parameters across data sets, this will also a the same time allow the multiples views to be refreshed at the same time without losing the search context.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Non-routine Detail – Non-routines tab • UMP – Non-routines tab • Deferral – Non-routines tab • Other – Non-routines, Visit, Warranty, Organization Map • VWP-Header – Visit tab • VWP-Detail – Visit tab • VWP-Scheduling – Visit tab • Entitlement – Warranty tab • Warranty Instance – Warranty tab • Template – Warranty tab

Region	Components

Non-routines Tab	Explores on-going and historical data across enterprise to evaluate transactions and determine root causes. It addresses Non Routine (Air Transport Association) ATA 100 code attributes to analyze commercial aviation assets (airplanes, helicopters, engines, etc .), their systems (flight controls, hydraulics, avionics, etc .), and their components (landing gear, brakes, valves, pumps, etc). It also tracks Asset utilization by Flight Hours, Flight Cycles and bucket period to oversee how likely assets, systems and components get downgraded due to aging influence. Enables you to set up performance rate thresholds to find spike events and take the appropriate decision to overcome shortfalls. You can also compare performance rates over time along with asset utilization to visualize trend curves and evaluate the effectiveness of corrective actions taken. Additionally, enables you to set up a Reliability System Foundations.
	• Non Routine Summary Features – this metrics displays:
	  • Total Non-routines
	  • Total Deferrals
	• Summarization Bar – this metrics displays:
	  • Open Non routines
	  • Open NR's Type
	  • Open NR's Urgency
	  • Open NR's Severity
	  • Open NR's Problem Code
	  • Open NR's Resolution Code

Region	Components

	• Open NR's ATA Code
	• Tag Cloud – displays Non Routine Record Counts, Non Routine Type Counts, Non Routine Problem Code Counts, and Non Route Resolution Code Counts
	• Non Routine Features displays:
	  • Non Routine Summary tab – this displays the Open Non Routines and History Non Routines charts
	  • ATA and Positions tab – this displays Open ATA and Position and History ATA and Position charts
	  • Non Routine Rates tab – this displays Non Routine Rate (including configuration) and Non Routine Rate charts
	• Results Table – displays detailed information in the following tabs:
	  • Non-routines
	  • Visit
	  • Work Order
	  • Repair Batch
	  • Maintenance Requirements
	  • Supplier Warranty
	  • Material Transactions
	  • Flight Schedule
	  • Deferrals

Region	Components
	• Configuration • Instance

Region	Components
Visit Tab	Enables you to break down Visit and Repair Batch attributes into metrics and dimensions to explore ongoing transaction trends and maintenance performance, explore top-down as well as bottom-up data for maintenance delays, maintenance space shortfalls, asset and resource availability. It enables you to compare side by side Visit planned and actual duration to determine hangar and space availability for maintenance. Additionally, you can compare planned vs. actual resources to evaluate performance based on availability, analyze planned and actual work load to oversee job progress, workload estimates, and due maintenance tasks. You can also cross-check metrics and dimensions for what-if scenario impacts; e.g. maintenance workload vs. estimated resources, resources vs. down times, etc. Displays the following: • Visit Summary metrics – displays Total Visits, Draft Visits, Planned Visit, Partially Implemented Visits, Impemented Visits, Planned Requirements, Planned Non-routines, Planned Work Orders, Closed Visits, and Implemented Work Orders • Visit Tag Cloud – displays Visit Record Counts, Actual Visit Resource Transaction, and Actual NR resource Transaction • Actual Visit Duration • Visit Chart Container displays Visit Performance and Visit Duration charts • Visit Result Tables Container displays detailed information in the following tabs: • Visit

Region	Components
	• Work Order • Non-routine • Repair Batch • Maintenance Requirements • Supplier Warranty • Material Transactions • Flight Schedule • Instance • Configuration • Deferrals

Region	Components

Warranty Tab	This enables you to monitor most common items under warranty and their due dates. Identify most common warranty claim items. You can evaluate claims and their costs broken down by in-house and third party work, determine warranty reimbursement budgets, oversee claim amounts across enterprise, and analyze warranty contracts and warranty entitlements.
	
	This displays the following:
	• Warranty/Claim Summary – this metrics displays Entitlements, Claims, Contracts, Templates, Visits
	• Warranty/Claim Tag Cloud – this displays Warranty Entitlements Count, Warranty Contracts, and Warranty Templates
	• Warranty/Claim Chart Container displays the Warranty Chart and the Claims Chart
	• Warranty/Claim Result Tables Container – displays detailed information in the following tabs:
	    • Supplier Warranty
	    • Non-routines
	    • Work Orders
	    • Planning
	    • Instance
	    • Material Transaction

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Material Transactions Tab</td><td>Enables you to monitor on-hand availability vs. material transaction across enterprise to maintain stock materials highest service level. Helps improve item availability for maintenance repair Turn Around Time (TAT). Helps analyze item unexpected failure and rouge components. Helps evaluate on-hand stock materials to optimize part availability vs. inventory stock costs. Helps evaluate item degradation due to aging vs. scrap rate streams. Helps improve maintenance troubleshooting based upon combined removal rates, disposition, and scrap rates. Enables you to oversee asset target configuration compliance, compare in-house item maintenance performance against externally maintained items to identify maintenance performance improvements and shortfalls.

Displays the following details:
Material Transactions Summary – this metrics displays the totals of Part Issues, Part Returns, Part Removals, Part Dispositions, and Parts Scrapped
Material Transactions Tag Cloud – this displays information about Material Transactions such as Material Transaction Record Count, Material Issues Counts, Material Returns Counts, Material Reservation Counts, Scrap Material Counts, and Material Disposition Counts
Material Removals Counts
Material Transactions Charts – this region displays the following:
Transactions tab – displays the Transactions Chart
Removals tab – displays the Removal and Removal History charts</td></tr>
</table>

Region	Components
	- Dispositions tab – displays the Open Disposition and Disposition History charts - Scrap Rate tab – displays the Scrap Rate Pivot table and the Scrap Rate chart - Removal Rate tab – displays the Removal Rate Pivot table and the Removal Rate charts - Disposition Rate tab – displays the Disposition Rate Pivot table and the Disposition Rate chart. - Results Tables – display detailed information in the following tabs: - Visit tab - Work Order tab - Non-Routine tab - Repair Batch - Maintenance Requirements - Material Transactions - Instance - Deferrals - Configuration

Region	Components

Quality Results	Enables you to set up individual metrics and dimensions based on (QCP) collection elements for their specific business lines. Helps you to monitor and analyze top collection element transactions. Helps you to analyze collection element relationships, collection plans and elements based on their logical business processes, and leverage multi-organization what-if scenarios by combining elements across collection plans for analysis.
	
	This displays the following information:
	
	• Quality Results Summarization – this metrics displays the totals for Collection Records, Plans, Plan Types, Organizations, Collection Elements, Requirements Collection Plan Records, Routes Collection Plan Records, Operations Collection Plan Records, MRB Collection Plan Records, and Non Routine Collection Plan Records
	
	• Quality Results Tag Cloud – displays quality results.
	
	• Quality Results by Object Type – displays the following information:
	
	    • Work Orders tab displays the Record Count by Work Order Name, Plan Name chart and the Work Orders table
	
	    • Operations tab displays the Record Count by Operation Description, Plan Name chart and the Operations table.
	
	    • Maintenance Requirements tab displays the Record Count by Maintenance Requirement Title, Plan Name chart and Maintenance Requirements table.

Region	Components
	• Non-routines tab displays the Record Count by Non-routine Title, Plan Name chart and the Non-routines table. • MRB tab displays the Record Count by Organization, Plan Name chart and the MRB table.

Region	Components

Repair Batch Tab	Displays the following information:
	• Summarization Bar – this metrics display totals of Repair Batches
	• Tag Cloud – displays Repair Batch information such as Repair Batches Record Count, Actual RB Resource Transaction, Actual NR RB resource Transaction and Actual RB Duration
	• Repair Batch Performance Chart displays the Employee Resource Transactions (sum), Employee Resource Assignments (sum), All Resource Transactions (sum) by Organization, and Item
	• The Results table displays detailed repair batch related information in the following tabs:
	  • Repair Batch
	  • Non-Routines
	  • Visits
	  • Work Order
	  • Maintenance Requirements
	  • Supplier Warranty
	  • Deferrals
	  • Material Transactions
	  • Instance

Region	Components
Organization Map Tab	Enables you to leverage the Organization geo-code map holistic view for transit maintenance. Provides advice gate availability in context of aircraft arrivals and departures within Maintenance Organizations. Provides display and analyze late maintenance departures. Enables you to oversee workload on Line Maintenance Organization by displaying open Visits, open Non Routines, or open Deferrals from station context as well as arrival and departure flights. Helps you to analyze 24/7 arrival and departure workload impacts to better plan for resource availability. Additionally, helps you to identify seasonal peak demand Line Maintenance Organizations. The Organization map hover over provides the below information. • Scheduled Gates • Planned gates • Units Counts • Open Visit Counts • AOG Work Order Counts • Down Times The Organization Map displays the following results tables: • Flight Schedule • Visit • Non Routines • Configuration

Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus Product Configuration

Overview

Once you have completed installation and common configurations as described in *Installing Oracle E-Business Suite Information Discovery*, *Release 12.2 V8* document (Doc ID: 2214431.1), you must complete the Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus product configuration setup as detailed in this section.

Setting up Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus Integration

1. Add any of the predefined roles to any of the predefined responsibilities, or to any other custom Complex Maintenance, Repair & Overhaul Information Discovery responsibility. Update the Grants and Permission Sets accordingly to provide access to Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus.

   See: Oracle E-Business Suite System Administrator's Guide - Security for more information on how to assign roles.

   See: Roles in Oracle Complex Maintenance, Repair & Overhaul Information Discovery , page 5-20

   See: Grants in Oracle Complex Maintenance, Repair & Overhaul Information Discovery , page 5-20

   See: Permission Sets in Oracle Complex Maintenance, Repair & Overhaul Information Discovery , page 5-21

   See: Appendix C: Adding Roles to Responsibilities and Setting Security Context in *Installing Oracle E-Business Suite Information Discovery*, *Release 12.2 V8* document (Doc ID: 2214431.1).

2. Run the Full Load Graph.

   See: Running the Full Load Graph , page 5-21

3. Set up the Scheduler.

   See: Setting Up the Scheduler for Incremental Refresh , page 5-22

Roles in Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus

Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus provides the following roles:

Role Name	Role ID
cMRO - Head of Maintenance Access Role	UMX|HOFM_CMRO_ENDECA_ACCESS_ROLE
cMRO - Complex Maintenance Director Access Role	UMX|CMD_CMRO_ENDECA_ACCESS_ROLE
cMRO - Heavy Maintenance Director Access Role	UMX|HMD_CMRO_ENDECA_ACCESS_ROLE
cMRO - Line Maintenance Director Access Role	UMX|LMD_CMRO_ENDECA_ACCESS_ROLE
cMRO - Component Maintenance Director Access Role	UMX|COMD_CMRO_ENDECA_ACCESS_ROLE

Grants in Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus

The following grants are available in Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus:

Grant Name	Permission Set	Access Role	Responsibility
cMRO - Head of Maintenance Grant	cMRO - Head of Maintenance Permission Set	cMRO - Head of Maintenance Access Role	Complex MRO Head Of Maintenance
cMRO - Complex Maintenance Director Grant	cMRO - Complex Maintenance Director Permission Set	cMRO - Complex Maintenance Director Access Role	Complex MRO Complex Assembly Director

Grant Name	Permission Set	Access Role	Responsibility
cMRO - Heavy Maintenance Director Grant	cMRO - Heavy Maintenance Director Permission Set	cMRO - Heavy Maintenance Director Access Role	Complex MRO Heavy Maintenance Director
cMRO - Line Maintenance Director Grant	cMRO - Line Maintenance Director Permission Set	cMRO - Line Maintenance Director Access Role	Complex MRO Line Maintenance Director
cMRO - Component Maintenance Director Grant	cMRO - Component Maintenance Director Permission Set	cMRO - Component Maintenance Director Access Role	Complex MRO Component Shop Director

Permission Sets in Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus

The following permission sets are available in Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus:

Permission Set Name	Permission Set ID
cMRO - Head of Maintenance Permission Set	HOFM_AHL_ENDECA_PERMISSION_SET
cMRO - Complex Maintenance Director Permission Set	CMD_AHL_ENDECA_PERMISSION_SET
cMRO - Heavy Maintenance Director Permission Set	HMD_AHL_ENDECA_PERMISSION_SET
cMRO - Line Maintenance Director Permission Set	LMD_AHL_ENDECA_PERMISSION_SET
cMRO - Component Maintenance Director Permission Set	COMD_AHL_ENDECA_PERMISSION_SET

Running the Full Load Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery*, *Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run a full refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, cMRO Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select ahl from the Sandbox list.
13. Select graph/FullLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler for Incremental Refresh

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery,Release 12.2 V8* document (Doc ID: 2214431.1), initial data load for Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.

3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, cMRO Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select ahl from the Sandbox list.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Technical Integration Components

View and Joins to Load Oracle Complex Maintenance, Repair & Overhaul Information Discovery Plus Data

The following view is used by the ETL layer in Endeca to load and display Oracle Complex Maintenance, Repair & Ovehaul Information Discovery Plus Data to the data store:

- AHL_EID_VISITS_V - View used in the data collection process to extract Visits data.
- AHL_EID_WORKORDERS_V - View used in the data collection process to extract Work Orders data.
- AHL_EID_VISIT_TASKS_V -- View used in the data collection process to extract Visit Tasks data
- AHL_EID_WARRANTY_V V -- View used in the data collection process to extract Warranty data.
- AHL_EID_MRS_V V -- View used in the data collection process to extract Materials data.
- AHL_ENDECA_NR_RATES_V V -- View used in the data collection process to extract Non-Routine Rate data.
- AHL_ENDECA_RB_V V -- View used in the data collection process to extract Repair Batch data.

6

Oracle Contract Renewal Command Center Plus

Overview

Oracle Contract Renewal Command Center Plus helps drive customer and partner loyalty, improve operational efficiency, and ensures that the return on investments of your customers and your organization are balanced. Using Oracle Contract Renewal Command Center Plus, you can:

- Align decision making and enhance collaboration in an organization to achieve the best outcome.

- Provide context to users when making decisions to ensure alignment of objectives and customer interests.

- Track progress towards objectives and provide a prescriptive course of action to achieve those objectives.

- Provide insight required to evaluate options and select the best business outcomes.

Each command center area and page is organized to support specific business outcomes. Oracle Contract Renewal Command Center Plus is a dashboard-driven product comprised of the following pages:

Customer Management Page - Drives customer loyalty, improves customer renewals, and increases share of the customer.

Portfolio Management Page - Balances Return on Investment (ROI) between customers and organization.

Vendor Management Page - Drives partner loyalty, removes obstacles for sales, and manages partner cash flow.

Contract Management Pages - Contains two separate pages for Lease and Finance

Contract Management and Service Contract Management. These pages drive operational efficiency and provide context for implementing transactions in OLFM and OKS.

You can search using Oracle Contract Renewal Command Center Plus pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Contract Renewal Command Center Plus application. This supplements information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

Oracle Contract Renewal Command Center Plus User Interfaces

Customer Management Page

Use the Customer Management page to better understand customers and improve your relationships. The Customer Management page also helps to drive customer loyalty through repurchase decisions that include renewals, extensions, and new business. This page can help to drive more business by understanding up-sell and cross-sell opportunities to customers across their portfolio of Finance and Service Contracts that they have with you. You can monitor factors that create customer satisfaction and dissatisfaction, contract cancellation and renewal, and factors that result in increased or decreased share. The Customer Management page includes the following high-level information:

- Customer
- Contracts (Finance and Service Contracts)
- Assets
- Vendors
- Service Requests
- Receivables
- Investment

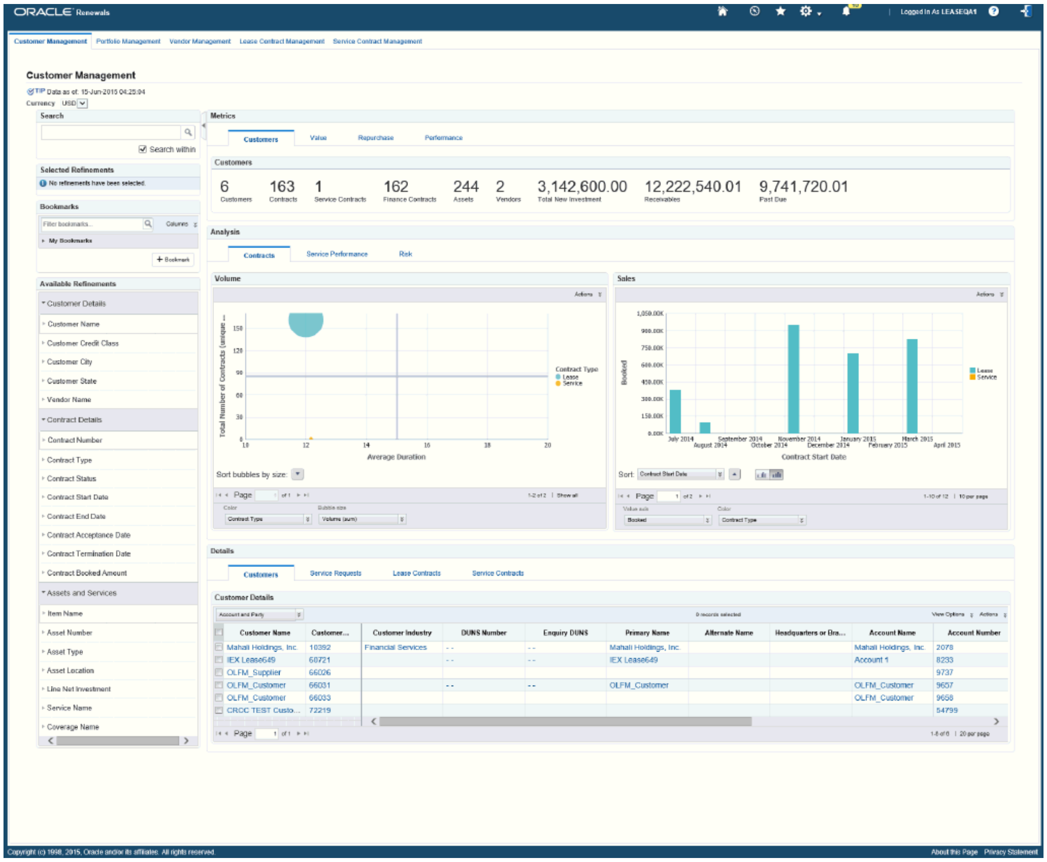
From the Customer Management page you can view customer information metrics, charts, and results tables. The following is a partial display of the Customer Management Page.

From the Lease Super User responsibility, navigate to the Customer Management page:

(N) Renewals > Customer Management

From the Service Contracts Manager responsibility, navigate to the Customer Management page:

(N) Renewal Command Center > Customer Management



Within the Customer Management page, you can analyze data using metrics, charts, graphs, and tables. The following describes the Customer Management page regions and components:

Region	Components
Advanced Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Customer Details • Contract Details • Assets and Services

Region	Components

Metrics (tabbed component container)	The Metrics tabbed component container contains four metrics tabs:
	• Customers
	  • Customers - Number of customers on active service and finance contracts as of the latest date.
	  • Contracts - number (count) of service and finance contracts as of the latest date.
	  • Service Contracts - number (count) of service contracts as of the latest date.
	  • Finance Contracts - number (count) of finance contracts as of the latest date.
	  • Assets - number (count) of assets in active contracts as of the latest date.
	  • Vendors - number (count) of vendors in booked and evergreen contracts as of the latest date.
	  • Total New Investment - financed amount of finance contracts and service contract amount booked in the last full calendar month
	  • Receivables - total open receivables as of the latest date. This is the sum of remaining balances in all open invoices.
	  • Past Due - the amount that is past due as of the latest date from receivables.
	  • Escalated SR's - the number (count) of Service Requests that are in escalated status as of the latest date.

Region	Components
	• Value • New Customers - number (count) of new customers in contracts booked over the last full calendar month. • New Finance Contracts - number (count) of finance contracts booked over the last full calendar month. • New Financing Volume - financed amount of contracts booked over the last calendar month. • New Service Contracts - number (count) of service contracts booked over the last full calendar month, excluding renewal contracts. • New Service Volume - booked amount of service contracts over the last full calendar month. • Repurchase • Expiring Contracts - number (count) of contracts expiring over the next thirty days. • Evergreen Finance Contracts - number (count) of finance contracts in Evergreen status as of latest date. • Evergreen Service Contracts - number (count) of service contracts following the Evergreen renewal process on the reporting date (system date). • Service Renewal Quotes - Number of quotes for service contracts that are under renewal. • Renewed Service Contracts - number

Region	Components

	(count) of renewed service contracts as of the latest date.
	• Performance
	  • Open Service Requests - number (count) of open service requests as of the latest date.
	  • Escalated Service Requests - number (count) of open escalated service requests as of the latest date.
	  • New Service Requests - number (count) of service requests filed over the last full calendar month.
	  • Past Due Service - past due receivables for service contracts as of the latest date.
	  • Past Due Finance - past due receivables for finance contracts as of the latest date.
	  • Total Past Due - total past due for the customer.

Region	Components

Analysis (tabbed component container)
Contracts (tab)
	Volume (chart)
	The Volume chart displays the total number and the average duration of service contracts and lease contracts.
	• Series Dimensions (color)
	  • Major Contract Type
	  • Contract Status
	  • Contract Financial Product
	  • Line Service Name
	  • Period of Origination
	  • Period of Expiration
	• Group Dimensions (bubble size)
	  • (none)
	  • Volume (sum)
	Note: The size of the bubble represents the Total Contract Value which is:
	    • Total financed cost for finance contracts
	    • Total of payments or initial face value for service contracts
	
	Sales (chart)
	The Sales chart displays the amount booked by year for service contracts and lease contracts.
	• Sort Options

Region	Components
	- Contract Start Date - Contract Start Date by Booked (sum) - Dimensions (value axis) - Booked - Cancelled / Terminated - Series Dimensions (color) (none) - Contract Type
Analysis (tabbed component container)	Service Request Analysis (chart)
Service Performance (tab)	The Service Request Analysis chart displays the number of service requests filed in each period. - Sort Options - Year / Month - Year / Month by Record Count - Series Dimensions (color) (none) - Service Request Severity - Escalated - Service Request Status - Service Name - Coverage Name

Region	Components

Analysis (tabbed component container)
 	
Risk (tab)
	Receivables (chart)
	
	The Receivables chart displays the measure of due and open receivables in aging buckets. The chart is empty until the user selects a currency.
	
	• Sort Options
	  • Aging Bucket
	  • Aging Bucket by Receivables (sum)
	• Series Dimensions (color)
	  • (none)
	  • Contract Type
	  • Customer Credit Class
	  • Contract Financial Product
	  • Contract Accrual Status
	  • Contract Investor Assignable
	
	Volume Segmentation (chart)
	
	The Volume Segmentation chart displays segmentation of NIV for active contracts as of the latest date and current period. The chart is empty until the user selects a currency.
	
	• Sort Options
	  • Customer Country
	  • Customer Country by Financed Lease Amount (sum)
	• Series Dimensions (color)
	  • Customer Country

Region	Components
	• Customer State • Asset Category • Vendor Program Name • Contract Investor Assignable • Contract Financial Product • Customer Credit Class • Line Service name

Region	Components

Details (tabbed component container)
 	
Customers (tab)
	Customer Details (results table)
	
	• Column Sets
	  • Account and Party
	  • Location and Contact
	  • Financial Information
	  • Classification
	  • Bankruptcy Information
	  • Events
	
	Note: You can select values from the column sets to filter your results. The selected values are added to the Selected Refinements component and can be removed.
	
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	
	• Actions
	  • Print
	  • Export
	  • Compare
	
	Note: You must select two or more lines to compare customer detail records.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Details (tabbed component container)

Service Requests (tab)</td><td>Service Requests (results table)
Column Sets
Details
Entitlement
Problem Summary
Resolution
View Options
Hide / Show Columns
Sort
Reset table to default
Actions
Print
Export
Compare

Note: You must select two or more lines to compare service request records.</td></tr>
</table>

Region	Components

Details (tabbed component container)
Lease Contracts (tab)
	Headers (results table)
	• Column Sets
	  • Contract
	  • Amount
	  • Net Investment and Residual
	  • IRR and Yields
	  • Billing and Receivables
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	Note: You must select two or more lines to compare lease contract records.
	  • Lease Contract Management Page - Quick Link
	Note: You must select one or more lines to enable the link.
	Asset Lines (results table)

Region	Components

	• Column Sets
	  • Details
	  • Amount
	  • Net Investment and Residual
	  • Billing and Receivables
	  • Corporate Book
	  • Tax Book
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export

Region	Components

Details (tabbed component container)
Service Contracts (tab)
	Headers (results table)
	• Column Sets
	  • Overview
	  • Bill To and Ship To
	  • Milestone Dates
	  • Leakage
	  • Pricing
	  • Forecast and Renewal
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	    Note: You must select two or more lines to compare service contract records.
	  • Service Contracts Management Page - Quick Link
	    Note: You must select one or more lines to enable the link.

Region	Components

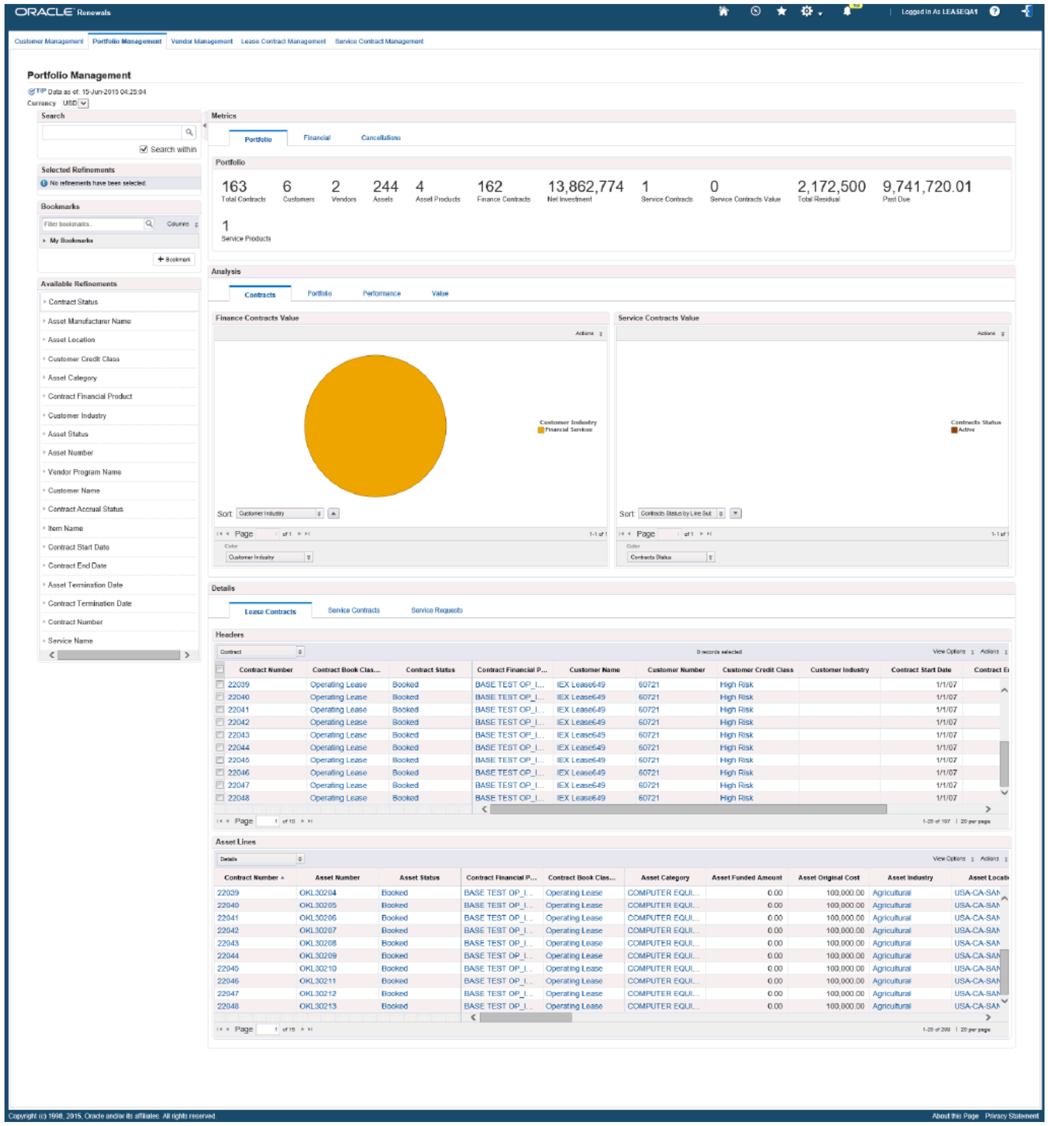
	Service Lines (results table)
	• Column Sets
	  • Overview
	  • Bill To and Ship To
	  • Leakage
	  • Pricing and Billing
	  • Coverage
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	Note: You must select two or more lines to compare service contract records.

Portfolio Management Page

The Portfolio Management page helps to ensure that the value for your customers is balanced with the value of your investment and risk. The information in the Portfolio Management page helps you benchmark the profitability and value between customers, contracts, assets, and sections of your portfolio, and determine the return on investment. The following is a partial display of the Portfolio Management Page.

From the Lease Super User responsibility, navigate to the Portfolio Management page:

(N) Renewals > Portfolio Management



Within the Portfolio Management page, you can analyze data using metrics, charts, graphs, and tables. The following describes the Portfolio Management page regions and components:

Region	Components
Advanced Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Contract Status • Asset Manufacturer Name • Asset Location • Customer Credit Class • Asset Category • Contract Financial Product • Customer Industry • Asset Status • Asset Number • Vendor Program Name • Customer Name • Contract Accrual Status • Item Name • Contract Start Date • Contract End Date • Asset Termination Date • Contract Termination Date • Contract Number

Region	Components
	• Service Name

Region	Components

Metrics (tabbed component container)	The Metrics tabbed component container contains three metrics tabs:
	• Portfolio
	  • Total Contracts - number (count) of booked, evergreen, and active contracts.
	  • Customers - Number of customers on active service and finance contracts as of the latest date.
	  • Vendors - number (count) of vendors in booked and evergreen contracts.
	  • Assets - number (count) of assets in active contracts.
	  • Asset Products - number (count) of distinct inventory items present in booked and evergreen contracts as of the latest date.
	  • Finance Contracts - number (count) of finance contracts.
	  • Net Investment - net investment balance in all asset lines in booked and evergreen status.
	  • Service Contracts - number (count) of active service contracts.
	  • Service Contracts Value - amount (sum) of active service contracts.
	  • Total Residual - sum of residual amount in booked contracts.
	  • Past Due - the amount that is past due as of the latest date from receivables.

Region	Components
	- Service Products - number (count) of service lines as of the latest date. • Financial - New Financing Volume - financed amount of finance contracts booked over the last calendar month. - Non Performing Investment - the NIV in non-accrual contracts. - Total Receivables - remaining balance in open invoices. - New Customers - number (count) of new customers in contracts booked over the last full calendar month. - End of Term Contracts - number (count) of contracts expiring within the next thirty days. - IPR Contracts - - New Service Volume - booked amount of service contracts over the last full calendar month. • Cancellations - Lost Customers - number (count) of lost customers in the past six months. - Default Customers - number (count) of customers in non-accrual status contracts. - Non Performing Contracts - number (count) of contracts in non-accrual Status. - Cancellations - number (count) of

Region	Components
	service contracts cancelled or terminated as of the latest date.

Region	Components

Analysis (tabbed component container)
Contracts (tab)
	Finance Contracts Value (chart)
	The Finance Contracts Value chart displays the NIV of active contracts as of the latest date (current period).
	• Sort Options
	  • Customer Industry
	  • Customer Industry by Line Net Investment (sum)
	• Series Dimensions (color)
	  • Customer Industry
	  • Contract Status
	  • Customer Credit Class
	  • Asset Category
	  • Customer Credit Risk Score
	  • Asset Residual Guarantor Type
	  • Asset Status
	  • Contract Accrual Status
	  • Asset Type
	  • Customer Credit Rating
	  • Contract Investor Assignable
	  • Contract Financial Product
	Service Contracts Value (chart)
	The Service Contracts Value chart displays the sum of future and expected payments for the current contract term of active contracts.

Region	Components

	• Sort Options
	  • Customer Industry
	  • Customer Industry by Line Sub Total Amount (sum)
	• Series Dimensions (color)
	  • Customer Industry
	  • Customer Credit Class
	  • Contracts Status
	  • Days to End of Term (EOT)
	  • Customer Country

Region	Components

Analysis (tabbed component container)
Portfolio (tab)
	Sales Analysis (chart)
	The Sales Analysis chart displays the number of contracts and contract volume booked (including renewals) of current active contracts.
	• Series Dimensions (color)
	  • (none)
	  • Contract Financial Product
	  • Asset Manufacturer Name
	  • Asset Category
	  • Line Service Name
	• Group Dimensions (Detail)
	  • (none)
	  • Contract Type
	  • Customer Industry
	  • Customer Credit Class
	• Bubble Size
	  • (none)
	  • Volume (sum)
	Sales and Terminations (chart)
	The Sales and Terminations chart displays the volume booked and the volume cancelled or terminated over the last twelve months. For finance contracts, volume cancelled is the NIV of terminations (with or without return). For service contracts the volume cancelled or terminated is the sum of cancellation or termination amounts.

Region	Components

	• Sort Options
	  • Customer Credit Class
	  • Customer Credit Class by Booked (sum)
	  • Customer Credit Class by Cancelled/Terminated (sum)
	• Group Dimensions (Category axis)
	  • Customer Credit Class
	  • Customer Industry
	  • Asset Category
	  • Contract Type
	  • Customer Country
	  • Asset Manufacturer Name
	  • Contract Financial Product
	  • Line Service Name
	  • Item Name

Region	Components
Analysis (tabbed component container)	Asset Performance (chart)

Performance (tab)	The Asset Performance Analysis chart displays service requests and the trend of service requests over the last 12 months.
	• Sort Options
	  • Year/Month
	  • Year/Month by Service Request Number (unique values)
	• Series Dimensions (color)
	  • (none)
	  • Service Request Status
	  • Service Request Severity
	  • Contract Financial Escalated

	Service Performance Analysis (chart)

	The Service Performance Analysis chart displays the trend of time to resolution of service requests over the last 12 months.
	• Sort Options
	  • Year/Month
	  • Year/Month by Time to Resolution (average)
	• Series Dimensions (color)
	  • (none)
	  • Service Request Severity

Region	Components
Analysis (tabbed component container)	Yields (chart)

Value (tab)	The Yields chart displays the distribution of contract yields across active contracts as of the current period and latest date.
	• Group Dimensions (X-axis)
	  • Contract After Tax Yield (sum)
	  • Contract After Tax IRR (average)
	  • Contract Pre Tax IRR (sum)
	• Series Dimensions (color)
	  • Contract Pre Tax IRR
	  • Contract After Tax IRR
	  • Contract After Tax Yield

Region	Components

Details (tabbed component container)
Lease Contracts (tab)
	Headers (results table)
	• Column Sets
	  • Contract
	  • Amount
	  • Net Investment and Residuals
	  • IRR and Yields
	  • Billing and Receivables
	Note: You can select values from the column sets to filter your results. The selected values are added to the Selected Refinements component and can be removed.
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	Note: You must select two or more lines to compare lease contract detail records.
	  • Lease Contract Management Page -

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td></td><td>
Quick Link

Note: You must select a contract to enable this link.
Asset Lines (results table)

Column Sets

Details
Amount
Net Investment and Residual
Billing and Receivables
Corporate Book
Tax Book

Note: You can select values from the column sets to filter your results. The selected values are added to the Selected Refinements component and can be removed.

View Options

Hide / Show Columns
Sort
Reset table to default

Actions

Print
Export

</td></tr>
</table>

Region	Components

Details (tabbed component container)
Service Contracts (tab)
	Headers (results table)
	• Column Sets
	  • Overview
	  • Bill To
	  • Ship To
	  • Leakage
	  • Pricing
	  • Forecast
	  • Renewal
	  • Upcoming Renewal
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Service Contract Management Page - Quick Link
	Service Lines (results table)
	• Column Sets
	  • Overview

Region	Components
	- Bill To and Ship To - Leakage - Pricing and Billing - New Set • View Options - Hide / Show Columns - Sort - Reset table to default • Actions - Print - Export - Compare **Note:** You must select two or more lines to compare service contract detail records.

Region	Components

Details (tabbed component container)
Service Requests (tab)
	Service Requests (results table)
	• Column Sets
	  • Details
	  • Coverage
	  • Customer
	  • Problem and Resolution
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	    Note: You must select two or more lines to compare service request records.

Vendor Management Page

The Vendor Management dashboard helps to drive partner loyalty. For those who use indirect sales models, this is the primary tool to help you drive business with your vendor and helps you to manage their cash flow. The Vendor Management page is organized around the following key activities:

- Exceptions – Alerts are provided that guide users to critical actions that need to be taken to address time sensitive issues.

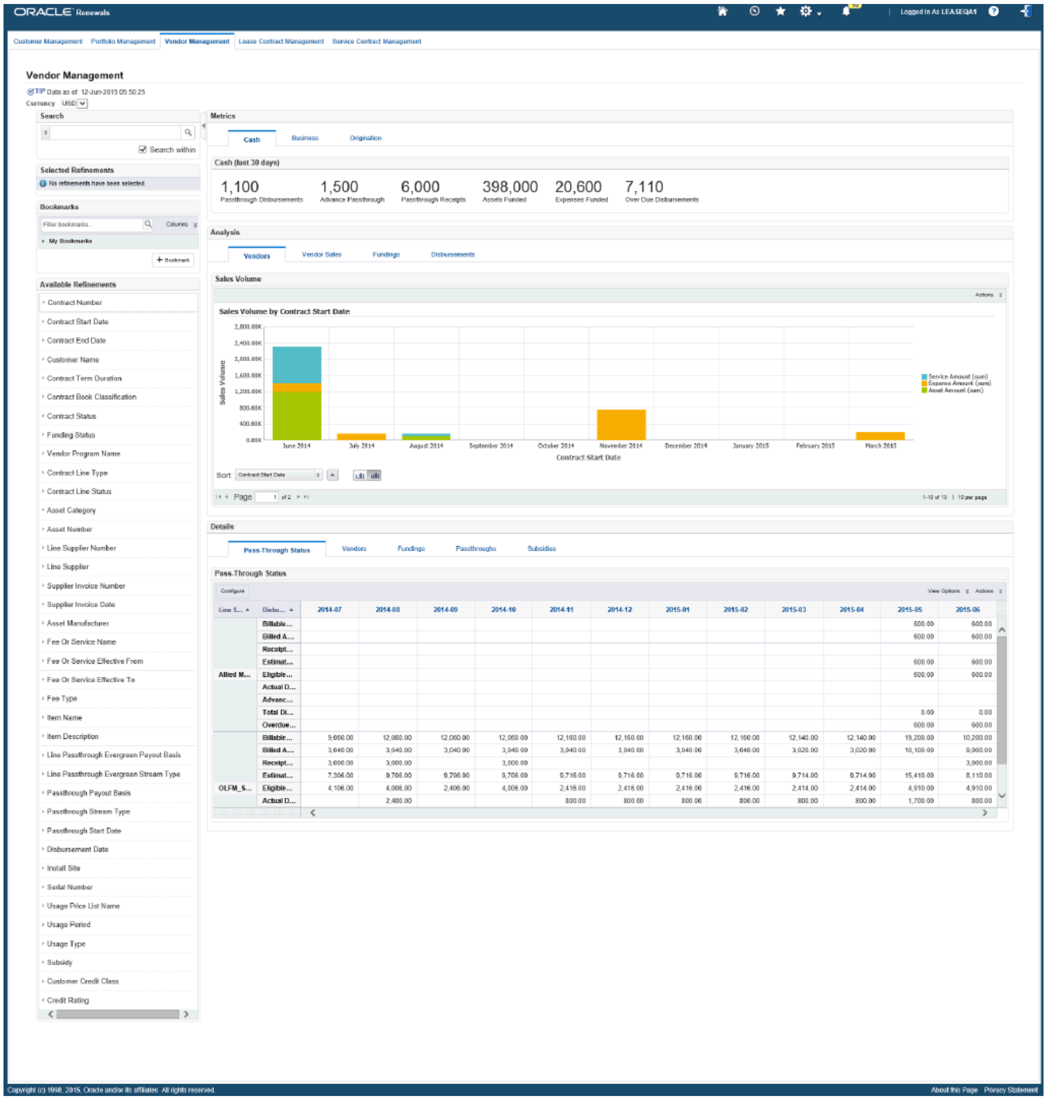
- Charts – graphs, charts, metrics, and tables help users identify work and decisions that are critical to address.

- Metrics – graphs, charts, metrics, and tables help users understand the overall state of relationships with vendors in the context of OLFM and service contract transactions.

From the Vendor Management page you can view vendor and partner information using metrics, charts, and results tables. The following is a partial display of the Vendor Management Page.

From the Lease Super User responsibility, navigate to the Vendor Management page:

(N) Renewals > Vendor Management



Within the Vendor Management page, you can analyze data using metrics, charts, graphs, and tables. The following describes the Vendor Management page regions and components:

Region	Components
Advanced Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Contract Number • Contract Start Date • Contract End Date • Customer Name • Contract Term Duration • Contract Book Classification • Contract Status • Funding Status • Vendor Program Name • Contract Line Type • Contract Line Status • Asset Category • Asset Number • Line Supplier Number • Line Supplier • Supplier Invoice Number • Supplier Invoice Date • Asset Manufacturer

Region	Components
	• Fee Or Service Name • Fee Or Service Effective From • Fee Or Service Effective To • Fee Type • Item Name • Item Description • Line Pass-through Evergreen Payout Basis • Line Pass-through Evergreen Stream Type • Pass-through Payout Basis • Pass-through Stream Type • Pass-through Start Date • Disbursement Date • Install Site • Serial Number • Subsidy • Customer Credit Class • Credit Rating

Region	Components

Metrics (tabbed component container)	The Metrics tabbed component container contains three metrics tabs:
	• Cash
	  • Pass-through Disbursements - Pass-through disbursements in the last 30 days.
	  • Advance Pass-through - Pass-through advances disbursed in the last 30 days.
	  • Pass-through Receipts - Receipts against invoices for pass-through invoices in the last 30 days.
	  • Assets Funded - Assets funded in the last 30 days.
	  • Expenses Funded - Expenses funded in the last 30 days.
	  • Overdue Disbursements - Disbursements overdue in the last 30 days.
	• Business
	  • Vendor Asset Volume - Current net investment value of all funded assets.
	  • Vendor New Asset Volume - Financed Assets on contracts booked in the last 30 days.
	  • Service Sales - Estimated pass-through disbursements in contracts booked in the last 30 days.
	  • Funding YTD - Sum of all amounts funded to vendors (assets and expenses) from the beginning of the calendar year.

Region	Components
	- Passthrough Amount - Sum of disburseable pass-through and service pass-through amounts in booked and Evergreen contracts within the last 30 days. - Vendor Subsidies - Subsidies billable to third parties in booked contracts in the last 30 days. - Passthrough Lines - Pass-through lines in booked and evergreen contracts. - Usage Lines - Usage lines in booked and evergreen contracts. - Vendor Programs - The number of unique Vendor Programs in contracts booked in the last 30 days. - Origination - Expenses Funded - Amounts funded in expense funding requests in the last 30 days. - Assets Funded - Amounts funded in asset funding requests in the last 30 days. - Expense Funded Amount - Expenses funded on contracts booked in the last 30 days. - Asset Funded Amount - Assets funded on contracts booked in the last 30 days. - Volume Closed - Financed amount of asset lines booked with a vendor associated in supplier invoice in the last 30 days.

Region	Components
	• Volume Closed Ratio - Financed amount of asset lines booked in the last 30 days with a vendor associated in supplier invoice, divided by the financed amount of all asset lines booked in the last 30 days.

Analysis (tabbed component container)
Vendors (tab)
	Sales Volume (chart)
	The Sales Volume chart displays the volume sold over each period.
	• Sort Options
	  • Contract Start Date
	  • Contract Start Date by Asset Amount (sum)
	  • Contract Start Date by Expense Amount (sum)
	  • Contract Start Date by Service Amount (sum)

Region	Components

Analysis (tabbed component container)
 	
Vendor Sales (tab)
	Sales Trend (chart)
	
	• Sort Options
	  • Line Supplier
	  • Line Supplier by Asset Amount (sum)
	  • Line Supplier by Expense Amount (sum)
	  • Line Supplier by Service Amount (sum)
	• Series Dimensions (color)
	  • (none)
	  • Customer Credit Class
	  • Asset Category
	  • Asset Manufacturer
	
	Sales (chart)
	
	The Sales chart displays the number of customers over the past-due pass-through disbursement amounts over the last twelve months.
	
	• Series Dimensions (color)
	  • (none)
	  • Asset Category
	  • Asset Manufacturer
	  • Customer Credit Class
	• Detail

Region	Components
	(none) - Line Supplier - Bubble Size (none) - Asset Amount (sum) - Expense Amount (sum) - Service Amount (sum)

Region	Components

Analysis (tabbed component container)
Fundings (tab)
	Asset Funding (chart)
	The Asset Funding chart displays trends of asset funded Amounts for contracts booked in the period.
	• Sort Options
	  • Contract Start Date
	  • Contract Start Date by Assets (sum)
	• Series Dimensions (color)
	  • (none)
	  • Asset Category
	  • Asset Manufacturer
	  • Line Supplier
	Expense Funding (chart)
	The Expense Funding chart displays trends of expense funded amounts for contracts booked in the period.
	• Sort Options
	  • Contract Start Date
	  • Contract Start Date by Expenses (sum)
	• Series Dimensions (color)
	  • (none)
	  • Asset Category
	  • Line Supplier
	  • Asset Manufacturer

Region	Components

Analysis (tabbed component container)
Disbursements (tab)
	Passthrough Status (chart)
	The Passthrough Status chart displays the pass-through disbursement status for the past 12 months.
	• Sort Options
	  • Disbursement Period
	  • Disbursement Period by Billable Amount (sum)
	  • Disbursement Period by Billed Amount (sum)
	  • Disbursement Period by Receipt Amount (sum)
	  • Disbursement Period by Estimated Disbursement (sum)
	  • Disbursement Period by Eligible Disbursement (sum)
	  • Disbursement Period by Actual Disbursement (sum)
	  • Disbursement Period by Advance Disbursement (sum)
	  • Disbursement Period by Total Disbursement (sum)
	  • Disbursement Period by Overdue Disbursement (sum)
	Funding Analysis (chart)
	The Funding Analysis chart displays the aging of past-due disbursements by funding type in each aging bucket.
	• Sort Options

Region	Components

	• Due Buckets
	• Due Buckets by Amount Due (sum)
	
	• Series Dimensions (color)
	  • (none)
	  • Funding Type
	  • Line Supplier

Details (tabbed component container)	Pass-Through Status (results table)

Pass-Through Status (tab)	The Pass-Through Status results table displays the pass-through disbursement data over the past 12 months
	• View Options
	  • Conditional Formatting
	  • Summaries
	  • Grand Summary
	• Actions
	  • Print
	  • Export

Region	Components
Details (tabbed component container)	Vendors (results table)

Vendors (tab)	The Vendors results table displays the vendor details and metrics for volume booked over the last 12 months.
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	    Note: You must select two or more lines to compare records.
	  • Details Icon - click the details icon to view Record Details for that row.

Region	Components
Details (tabbed component container)	Fundings (results table)

Fundings (tab)	The Fundings results table displays the asset, expense and advance disbursement fundings completed over the last 12 months.
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export

Region	Components

Details (tabbed component container)
Passthroughs (tab)
	Passthroughs (results table)
	The Passthroughs results table displays the pass-through disbursement data over the last 12 months by supplier and contract.
	• View Options
	  • Summary Rows
	  • Grand Summary Row
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	    Note: You must select two or more lines to compare records.
	  • Details Icon - click the details icon to view Record Details for that row.

Region	Components
Details (tabbed component container)	Subsidies (results table)

Subsidies (tab)	The Subsidies results table displays subsidies that were applied to contracts over the last 12 months.
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export

Lease Contract Management Page

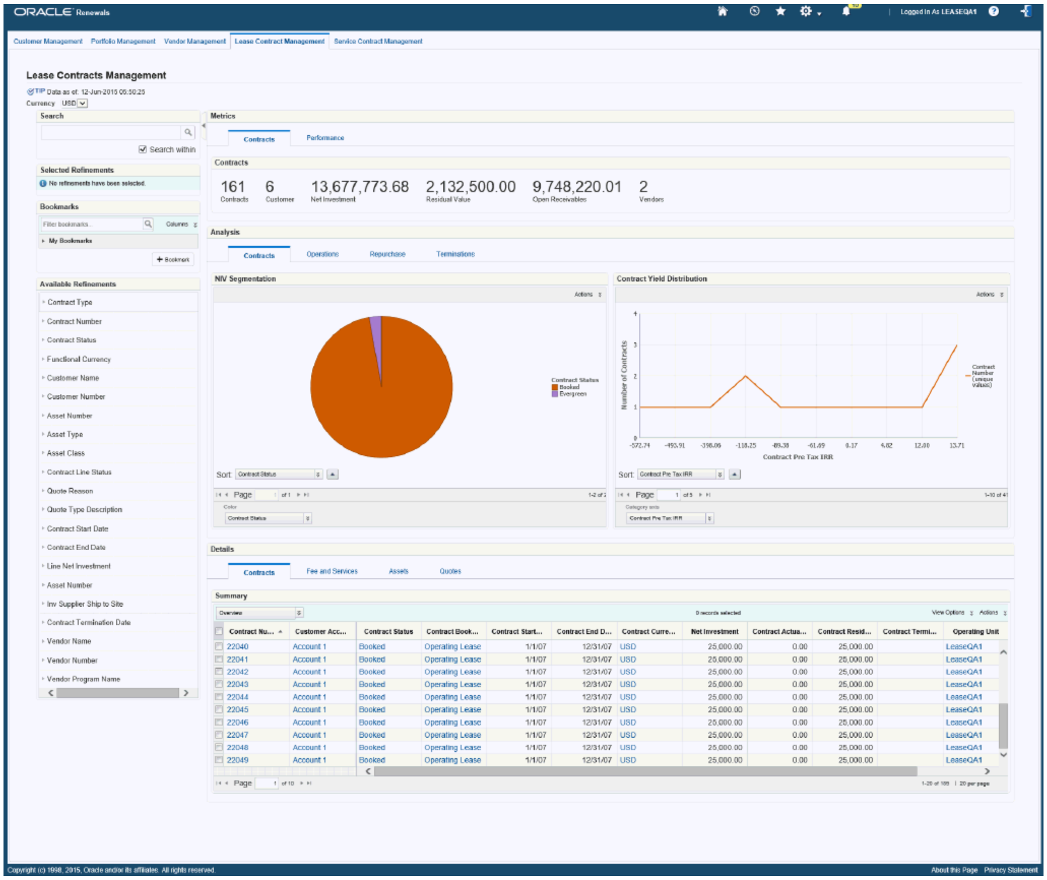
The Lease Contract Management page provides information to better manage your lease contracts. The information from this page helps to increase operational efficiency by identifying exception situations that require immediate attention, and provides insights to help you take action. The Lease Contract Management page is organized around the following key activities:

- Exceptions – Alerts are provided that guide users to critical actions that need to be taken to address risks to the contract.
- Workload Balance – graphs, charts, metrics, and tables help users identify decisions that are critical to address.
- Metrics – graphs, charts, metrics, and tables.

From the Lease Contract Management page you can view information using metrics, charts, and results tables. The following is a partial display of the Lease Contract Management Page.

From the Lease Super User responsibility, navigate to the Lease Contract Management page:

(N) Renewals > Lease Contract Management



Within the Lease Contract page, you can analyze data using metrics, charts, graphs, and tables. The following describes the Lease Contract Management page regions and components:

Region	Components
Advanced Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Contract Type • Contract Number • Contract Status • Functional Currency • Customer Name • Customer Number • Asset Number • Asset Type • Asset Class • Contract Line Status • Quote Reason • Quote Type Description • Contract Start Date • Contract End Date • Line Net Investment • Asset Number • Inv Supplier Ship To Site • Contract Termination Date

Region	Components
	• Vendor Name • Vendor Number • Vendor Program Name

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Metrics (tabbed component container)</td><td>The Metrics tabbed component container contains two metrics tabs:

Contracts

Contracts - number (count) of booked and evergreen contracts.
Customer - Number of customers on active service and finance contracts as of the latest date.
Net Investment - net investment balance in all asset lines in booked and evergreen status.
Residual Value - residual amount in all booked contracts.
Open Receivables - remaining balance in open invoices.
Vendors - number (count) of vendors in booked and evergreen contracts.

Performance

Pending Renewal - number (count) of lease contracts with at least one renewal quote in accepted status.
Termination Rate % - number (count) of terminated asset lines (termination date in the last full month) divided by the number (count) of active lines (booked and evergreen).
Approved - approved termination and renewal quotes asset lines.
Submitted - submitted for approval termination and renewal quotes asset lines.

</td></tr>
</table>

Region	Components
	• Accepted Renewals - number (count) of asset lines in accepted renewal quotes. • Accepted Terminations - number (count) of asset lines in accepted termination quotes. • Completed Renewals - number (count) of processed renewal lines (renewal assets booked) in the last 30 days. • Completed Terminations - number (count) of terminated asset lines in the last 30 days. • Cancelled Terminations - number (count) of cancelled asset lines in accepted quotes in the last 30 days.

Region	Components
Analysis (tabbed component container)	NIV Segmentation (chart)

Contracts (tab)	The NIV Segmentation chart displays segmentation NIV of active contracts (Booked and Evergreen contracts).
	• Sort Options
	  • Contract Status
	  • Contract Status by Line Net Investment (sum)
	• Series Dimensions (color)
	  • Contract Status
	  • Asset Manufacturer
	  • Contract Investor Assignable
	  • Contract Accrual Status
	  • Contract Book Classification
	Contract Yield Distribution
	• Sort Options
	  • Contract Pre Tax IRR
	  • Contract Pre Tax IRR by Contract Number (unique values)
	• Group Dimensions (category axis)
	  • Contract Pre Tax IRR
	  • Contract After Tax IRR
	  • Contract After Tax Yield
	  • Subsidized After Tax IRR

Region	Components
	• Subsidized Pre Tax IRR

Region	Components

Analysis (tabbed component container)
 	
Operations (tab)
	Rebooks (chart)
	
	The Rebooks chart displays the source of rebooks that occurred over the last periods.
	
	• Sort Options
	    • Rebook Reason
	    • Rebook Reason by Contract Number (unique values)
	• Series Dimensions (color)
	    • Rebook Reason
	    • Rebook Type
	
	Rebook Analysis (chart)
	
	The Rebook Analysis chart displays the evolution of rebooks by NIV across periods.
	
	• Sort Options
	    • Revision Date
	    • Revision Date by Contract Number (unique values)
	• Group Dimensions (value axis)
	    • Number of Contracts
	    • Residual Amounts
	    • Net Investment
	• Series Dimensions (color)
	    • (none)
	    • Rebook Reason
	    • Rebook Type

Region	Components

Analysis (tabbed component container)
Repurchase (tab)
	Repurchases (chart)
	The Repurchases chart displays the number of assets by days to end of term (EOT).
	• Sort Options
	  • Days to EOT
	  • Days to EOT by Number of Assets (sum)
	• Group Dimensions (value axis)
	  • Number of Assets
	  • Residual
	• Series Dimensions (color)
	  • (none)
	  • Quote Status
	  • Item Category
	Quotes (chart)
	The Quotes chart displays the number of approved and accepted quotes by days to expiration or days to End of Term (EOT) within a calendar year.
	• Sort Options
	  • Calendar Period Year
	  • Calendar Period Year by Approved (sum)
	  • Calendar Period Year by Accepted (sum)
	• Group Dimensions (category axis)

Region	Components
	- Calendar Period Year - Calendar Period Name - Series Dimensions (color) (none) - Days to Expiration - Days to EOT

Region	Components
Analysis (tabbed component container)	Termination and Repurchase (chart)

Terminations (tab)	The Termination and Repurchase chart displays NIV of terminated and expired assets, and gain/loss on terminations.
	• Dimensions (x-axis)
	  • NIV Expired (sum)
	  • NIV Terminated (sum)
	• Series Dimensions (color)
	  • (none)
	  • Asset Manufacturer
	  • Item Name
	  • Asset Class
	• Detail
	  • (none)
	  • Days to EOT
	  • Quote Type Description
	  • Quote Reason Description
	• Bubble Size
	  • (none)
	  • NIV Expired (sum)
	  • Quote Gain Loss (sum)
	  • NIV Terminated (sum)
	Termination Trend (chart)

Region	Components

	The Termination Trend Chart displays evolution of NIV of terminated or expired contracts, and gain/loss on termination.
	• Sort Options
	  • Year
	  • Year by NIV Expired (sum)
	  • Year by NIV Terminated (sum)
	  • Year by Quote Gain Loss (sum)
	  • Year by Record Count
	• Group Dimensions (category axis)
	  • Year
	  • Month

Region	Components

Details (tabbed component container)
Contracts (tab)
	Summary (results table)
	• Column Sets
	  • Overview
	  • Financial Summary
	  • Yields
	  • Billing and Receivables
	  • Past Due Amounts
	  • Current Balances
	  • Actions - within this column set, customers can select the following actions to open AOF pages:
	    • View Quotes - customers can select this action to open the contract generic quote page and search further for quotes.
	    • Termination Quotes - select this action to open the contract termination quotes page where you can select quotes for further processing.
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export

Region	Components
	Compare **Note:** You must select two or more lines to compare records.
Details (tabbed component container) Fee and Services (tab)	Contract Lines (results table) - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export

Region	Components

Details (tabbed component container)
Assets (tab)
	Asset Lines (results table)
	• Column Sets
	  • Billing
	  • Amounts
	  • Vendor
	  • Tax Book
	  • Corporate Book
	  • Customer
	  • Up Front Tax
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export

Region	Components

Details (tabbed component container)
Quotes (tab)
	Quotes (results table)
	• Column Sets
	  • Quotes
	  • Assets
	  • Contracts
	  • Actions - within the Actions column set, there are three linked options for each quote line:
	    • View Quote - select this link to open the View Quote page.
	    • Approve Quote - select this link to open the Approve Quote page.
	    • Termination Quote - select this link to open the Termination Quote page.
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export

Service Contract Management Page

The Service Contract Management page provides information to manage and prioritize service contracts for renewal. The Service Contract Management page is organized around the following key activities:

- Exceptions – alerts are provided that guide users to prioritize actions that are required to address renewal risk.

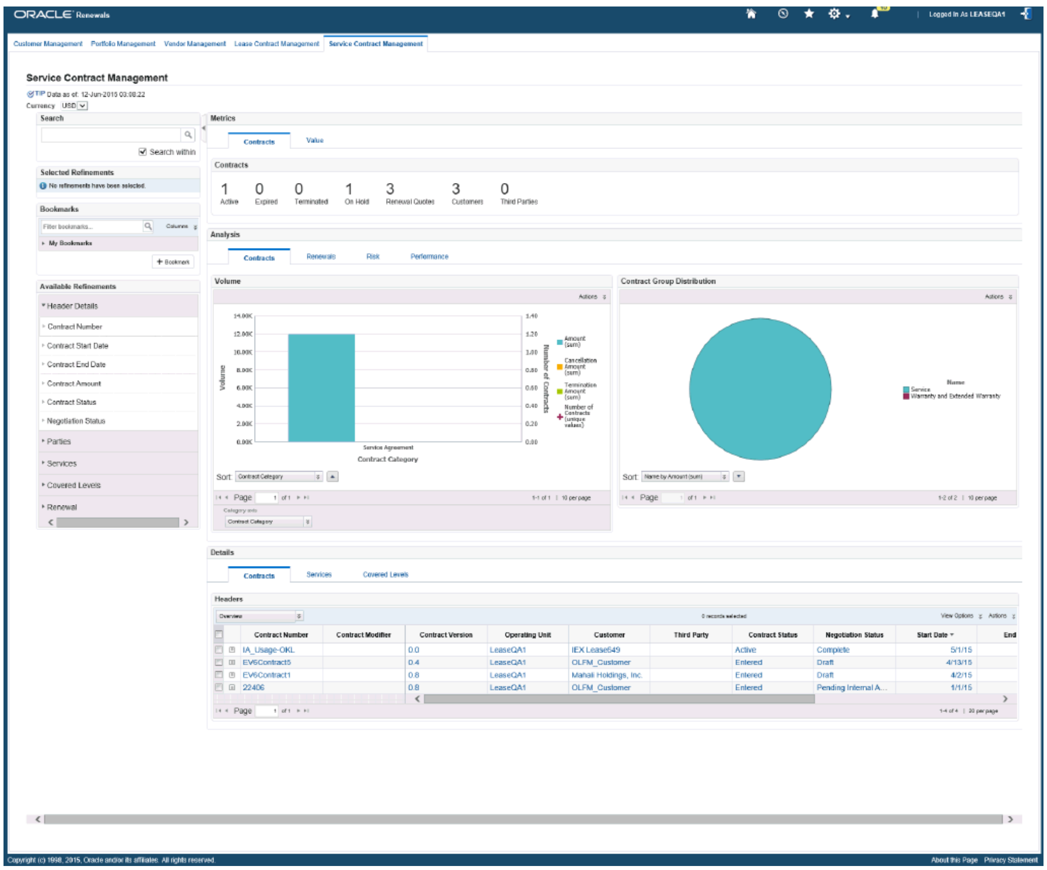
- Workload Balance – graphs, charts, metrics, and tables help users identify contracts that are critical to prioritize, monitor progress on renewal cycle, and provide insight into renewal performance.

From the Service Contract Manager responsibility, navigate to the Service Contract Management page:

(N) Renewal Command Center > Service Contract Management

From the Lease Super User responsibility, navigate to the Service Contract Management page:

(N) Renewals > Service Contract Management



Within the Service Contract page, you can analyze data using metrics, charts, graphs, and tables. The following describes the Service Contract Management page regions and components:

Region	Components
Advanced Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Header Details • Parties • Services • Covered Levels • Instance Details • Renewal

Region	Components

Metrics (tabbed component container)	The Metrics tabbed component container contains two metrics tabs:
	• Contracts
	  • Active - number (count) of active service contracts
	  • Expired - number (count) of expired service contracts
	  • Terminated - number (count) of service contracts
	  • On Hold - number (count) of service contracts in Hold status
	  • Renewal Quotes - number (count) of renewal quotes that are under negotiation
	  • Customers - Number of customers on active service and finance contracts as of the latest date.
	  • Third Parties - number (count) of distinct third parties in service contracts
	• Value
	  • Active Contract Amount - the amount of contracts that are active as of the latest date
	  • Termination Amount - the amount of contracts that are terminated as of the latest date
	  • Open Quote Amount - contract amount on the contract renewal quotes that are under negotiation
	  • Canceled Amount - the amount of

Region	Components
	contracts that are canceled as of the latest date

Analysis (tabbed component container)
Contracts (tab)
	Volume (chart)
	The Volume chart displays total contract amount (sum) by contract category.
	• Sort Options
	  • Contract Category
	  • Contract Category by Amount (sum)
	  • Contract Category by Cancellation Amount (sum)
	  • Contract Category by Termination Amount (sum)
	  • Contract Category by Number of Contracts (unique values)
	• Group Dimensions (category axis)
	  • Contract Category
	  • Contract Status
	  • Negotiation Status
	  • Service Name
	Contract Group Distribution
	The Contract Distribution chart displays contract volume and percentage by contract groups.
	• Sort Options
	  • Name
	  • Name by Amount (sum)

Region	Components
Analysis (tabbed component container)	Renewal Aging (chart)

Renewals (tab)	The Renewal Aging chart displays the contract amount that is available for renew versus the amount for which the quotes have been created and are under negotiation, classified by due days to end of term.
	• Sort Options
	  • Age Bucket
	  • Age Bucket by Available to Book (sum)
	  • Age Bucket by Quoted Amount (sum)
	  • Age Bucket by Cancellation Amount (sum)
	
	Quotes (chart)
	
	The Quotes chart displays contract volume and percentage by negotiation status.
	• Sort Options
	  • Negotiation Status
	  • Negotiation Status by Amount (sum)

Region	Components

Analysis (tabbed component container)
Risk (tab)
	Renewal Leakage (chart)
	The Renewal Leakage chart displays contract volume and percentage by cancellation reason, termination reason, and service name.
	• Sort Options
	  • Service Name
	  • Service Name by Leakage Amount (sum)
	• Series Dimensions (color)
	  • Service Name
	  • Termination Reason
	  • Cancellation Reason
	Value vs Risk (chart)
	The Value vs Risk chart displays the contract value rating and risk rating by contract status or negotiation status. The chart also displays the number of contracts by bubble size.
	• Series Dimensions (color)
	  • Negotiation Status
	  • Contract Status
	• Bubble Size
	  • (none)
	  • Number of Contracts (unique values)

Region	Components

Analysis (tabbed component container)
Performance (tab)
	Renewal Trend (chart)
	The Renewal Trend chart displays contract amount, cancellation amount, termination amount (optionally by contract categories) rolling up by fiscal year.
	• Sort Options
	  • Fiscal Month
	  • Fiscal Month by Amount (sum)
	  • Fiscal Month by Cancellation Amount (sum)
	  • Fiscal Month by Termination Amount (sum)

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Details (tabbed component container)
Contracts (tab)</td><td>Headers (results table)

Column Sets

Overview
Bill To
Ship To
Milestone Dates
Leakage
Pricing
Forecast
Renewal
Upcoming Renewal
Actions

View Contracts Detail
View Approval History

View Options

Hide / Show Columns
Sort
Reset table to default

Actions

Print
Export
Compare

</td></tr>
</table>

Region	Components
	Note: You must select two or more lines to compare records. • Mass Update • Quick Links • Details Icon - displays record details for the selected row. **Note:** You must select one or more lines to enable the link.

Region	Components

Details (tabbed component container)
Services (tab)
	Services (results table)
	• Column Sets
	  • Overview
	  • Bill To
	  • Ship To
	  • Leakage
	  • Pricing and Billing
	  • Payment
	  • Coverage
	  • Exception Coverage
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	    Note: You must select two or more lines to compare records.
	• Quick Links
	  • Details Icon - displays record details

Region	Components
	for the selected row. **Note:** You must select one or more lines to enable the link.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Details (tabbed component container)

Covered Levels (tab)</td><td>Covered Levels (results table)

Column Sets
Overview
Instance Details
Leakage
Pricing and Billing
View Options
Hide / Show Columns
Sort
Reset table to default
Actions
Print
Export
Compare

Note: You must select two or more lines to compare records.
Quick Links
Details Icon - displays record details for the selected row.

Note: You must select one or more lines to enable the link.
</td></tr>
</table>

Oracle Contract Renewal Command Center Plus Product Configuration

Setting Up Oracle Contract Renewal Command Center Plus

Oracle Contract Renewal Command Center Plus product configuration setup must be completed after the installation and common configurations are completed as described in *Oracle E-Business Suite Information Discovery Globalization Guide, Release 12.2 V8* (Doc ID: 2214432.1).

Setup and Configuration Steps

To set up Oracle Contract Renewal Command Center Plus, you must complete the following steps:

1. Setting Access Control, page 6-84 by assigning UMX roles and updating access grants.
2. Setting Profile Options, page 6-87 to ensure appropriate data is loaded for analysis.
3. Loading Oracle Contract Renewal Command Center data to the Data Domain, page 6-88 by running graphs provided.
4. Scheduling Setup, page 6-89 for incremental data loads and full data refresh.

Setting Access Control

Based on the roles and responsibilities of the different business users, access to the Oracle Contract Renewal Command Center Plus dashboards are set up using the Role Based Access Control (RBAC) feature of Oracle E-Business Suite.

Oracle Contract Renewal Command Center Plus includes the following menu and functions to access the various dashboards.

Under OKL_SUPER_USER_MENU (Lease Super User Menu):

Sub Menu Code	Function Code	Function Name
OKL_CRCC_HYBRID (CRCC Hybrid Menu)	OKL_CRCC_ENDECA_CUSTOMER_PG	CRCC: Customer Management Page

Sub Menu Code	Function Code	Function Name
	OKL_CRCC_ENDECA_PORTFOLIO_PG	CRCC: Portfolio Management Page
	OKL_CRCC_ENDECA_VENDORS_PG	CRCC: Vendor Management Page
	OKL_CRCC_ENDECA_OKL_CNT_PG	CRCC: Lease Contract Management Page
	OKL_CRCC_ENDECA_OKS_PG	CRCC: Service Contract Management Page

Under OKS_MANAGER_TOP_LEVEL_MENU_R12 (OKS Manager Top level menu):

Sub Menu Code	Function Code	Function Name
OKS_COMMAND_CENTER_R12	OKS_CRCC_ENDECA_CUST_PG	OKS CRCC Endeca Customer Page
	OKS_ENDECA	CRCC Service Contracts Management Page

The following roles have been seeded for Oracle Contract Renewal Command Center Plus:

Role Name	Internal Code Name
CRCC Lease Access Role	UMX|OKL_CRCC_ENDECA_ACCESS_ROLE
CRCC Service Access Role	UMX|OKS_ENDECA_ACCESS_ROLE

The following are the permission sets created to control access to each of the dashboards in CRCC:

Permission Sets	Internal Code Name
CRCC Customer Permission Set	OKL_CRCC_CUSTOMER_PS
CRCC Lease Contracts Permission Set	OKL_CRCC_ENDECA_OKL_CNT_PS
CRCC Portfolio Permission Set	OKL_CRCC_PORTFOLIO_PS
CRCC Vendors Permission Set	OKL_CRCC_VENDORS_PS
CRCC Service Contract Permission Set	OKS_ENDECA_ACCESS_PS
CRCC Customer Permission Set (Service Only)	OKS_CRCC_ENDECA_CUST_PS

The following are the grants to the seeded roles:

Grant Name	Description	Permission Set	Security Context Grantee
CRCC Customer Grant	CRCC Customer Grant	CRCC Customer Permission Set	CRCC Lease Access Role
CRCC Portfolio Grant	CRCC Portfolio Grant	CRCC Portfolio Permission Set	CRCC Lease Access Role
CRCC Lease Contracts Grant	CRCC Lease Contracts Grant	CRCC Lease Contracts Permission Set	CRCC Lease Access Role
CRCC Vendors Grant	CRCC Vendors Grant	CRCC Vendors Permission Set	CRCC Lease Access Role
CRCC Service Contracts Grant	CRCC Service Contracts Grant	CRCC Service Contracts Permission Set	CRCC Lease Access Role
OKS_ENDECA_ACCESS_GRANT	CRCC Service Contracts Grant	CRCC Service Contracts Permission Set	CRCC Service Access Role

Grant Name	Description	Permission Set	Security Context Grantee
OKS_ENDECA_CUST_GRANT	CRCC Service Customer Grant	CRCC Customer Permission Set (Service Only)	CRCC Service Access Role

Oracle recommends that you use and add 'CRCC Lease Access Role' (Internal Code Name: UMX|OKL_CRCC_ENDECA_ACCESS_ROLE) with Lease Super User Responsibility, and 'CRCC Service Access Role' (Internal Code Name: UMX|OKS_ENDECA_ACCESS_ROLE) with Service Contracts Manager responsibility to grant access to menu items of CRCC. The roles can also be used with custom responsibilities using the same menu.

If you want to use the above access roles with more than one responsibility, then you must add an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process while you are adding the role to the responsibility. For assigning UMX roles and grants, refer to Appendix C in Oracle E-Business Suite Information Discovery Globalization Guide, Release 12.2 V8 (Doc ID: 2214432.1).

Profile Options for Oracle Contract Renewal Command Center Plus

You must set the following profile options:

Profile Option Name	Description
Enable CRCC for Oracle Lease Management	This profile option enables you to load the Finance contracts into the okl-oks-crcc data domain to view customer management and portfolio management dashboard.
Enable CRCC for Oracle Service Contracts	This profile option enables you to load the Service contracts into the okl-oks-crcc data domain to view customer management and portfolio management dashboard.
OKS: Contract Extraction Reference Date	This profile option specifies the reference date from which expired, terminated, and canceled service contracts are to be loaded during a full load. This does not govern active contracts.

Profile Option Name	Description
OKL: CRCC EXTRATION FROM DATE	This profile option specifies the reference date from which expired and terminated finance contracts are to be loaded during a full load. This does not govern active contracts.

Loading Data into the Data Domain for Oracle Contract Renewal Command Center Plus

Clover ETL graphs within Endeca server queries data source Views in E-Business suite and does a full data load to the appropriate data domain. The first data load must be a full load where the required data for analysis is loaded, and from there on the changed data is incrementally loaded on a periodic basis according to business requirements. Incremental data load updates the changed records in Oracle E-Business Suite to the data domain as of the last load. After the successful data load, the Oracle Contract Renewal Command Center Plus pages can be viewed.

Data Domains and Data Sources for Oracle Contract Renewal Command Center Plus

Data sources are defined in the data domain and are used to query data for different pages in Oracle Contract Renewal Command Center Plus. The following data domains and data sources are included with Oracle Contract Renewal Command Center Plus:

Data Domain Name	Data Source Name	Purpose
okl-oks-crcc	okl-oks-crcc	Holds data that is common between Finance and Service Contracts. The Customer Management and Portfolio Management pages utilize the data in this data domain.
okl-crcc	okl-crcc	Holds data that is specific to Finance Contracts. The Vendor Management and Lease Contract Management pages utilize the data in this data domain

Data Domain Name	Data Source Name	Purpose
oks-crcc	oks-contract	Holds data that is specific to Finance Contracts. The Vendor Management and Lease Contract Management pages utilize the data in this data domain

You can load data by running the ETL graphs provided under the CRCC sandboxes **okl-oks-crcc**, **okl-crcc**, and **oks-contract**.

To load data to the data domains:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under any of the above sandboxes.

2. Graphs to load data include:

   - **Full.grf**: This graph loads the metadata and data from the appropriate views to the corresponding CRCC data domain on the Endeca server.

   - **Incremental.grf**: Incremental data load will update changed records in EBS to the data domain since the last successful load. It will also load any new records since the last load.

     Note: Data deleted in EBS will not be removed from Endeca by running Incremental Graph. You must complete a full refresh by running the Full.grf graph to remove all the data from Endeca and then reload the required data.

     Refer to *Oracle E-Business Suite Information Discovery Globalization Guide, Release 12.2 V8* (Doc ID: 2214432.1) for more information on data upload into the Endeca server.

Setting Up the Scheduler for Data Loads

After the initial data upload, depending on your organization requirements, you can determine how often the incrementally changed data from Oracle E-Business Suite must be loaded into the appropriate data domain. You can also schedule periodic full refresh which deletes all data from data domain and repopulates the required data.

To schedule a data load job in the Integrator:

1. Login to the Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. 12. Select the appropriate Sandbox and the graph for schedule to run. I.e. Full. grf/Incremental.grf.
13. Click Create to set the scheduler.

Views for Oracle Contract Renewal Command Center Plus

The following views are used to load Oracle Contract Renewal Command Center data to the Data Domain:

View Name	Purpose
OKS_K_REPRT_ENDECA_V	This is the view which retrieves Service Contract information such as the header, lines, and covered level. This feeds the primary data for the oks-crcc data domain.
OKS_ENDECA_CONTRACT_COMN_V	This is the view which retrieves Service Contract information such as header, lines, and invoice details. This feeds the primary data for the okl-oks-crcc data .

View Name	Purpose
OKS_ENDECA_PARTIES_V	This view is used to obtain the service contract party related information. This is used in the okl-oks-crcc data domain.
OKL_ENDECA_CONTRACTS_V	This view retrieves the contract level information of Finance Contracts. This is used in both okl-oks-crcc and okl-crcc data domains.
OKL_ENDECA_PARTIES_V	This view is used to obtain the finance contract party related information. This is used in the okl-oks-crcc data domain.
OKL_ENDECA_SRS_V	This view is used to obtain Service Request information relating to customers that have either a service contract or a finance contract. This is used in the okl-oks-crcc data domain.
OKL_ENDECA_QUOTES_V	This view is used to obtain the information relating to Middle-of-Term and End-of-Term quotes associated with Finance Contracts. This is used in the okl-crcc data domain.
OKL_ENDECA_TCS_V	This view is used to load the information relating to the terms and conditions of finance contracts. This is used in the okl-crcc data domain.
OKL_ENDECA_REBOOK_V	This view is used to obtain the information of re-booked Finance Contracts. This is used in the okl-crcc data domain.
OKL_ENDECA_VENDORS_V	This view is used to obtain the cash flow information relating to vendors associated with Finance Contracts. This is used in the okl-crcc data domain.

7

Oracle Cost Management Information Discovery Plus

This chapter covers the following topics:

Overview

You can use Oracle Cost Management Information Discovery Plus to quickly search and filter transaction details across organizations and related entities. You can also use the Available Refinements and other search features to identify hidden trends. Using the Oracle Cost Management Information Discovery Plus pages, you can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using Cost Management pages and Oracle E-Business Suite Information

Discovery design tools. These pages are hosted in an Information Discovery environment, and called from new pages that embed the Information Discovery pages in EBS. The following pages are available for Costing using Oracle E-Business Suite Information Discovery integration:

- **Period Health Check**: This page lets you search for uncosted, transactions in error, and unprocessed Inventory, Manufacturing, WIP, Receiving, Shipping, Landed Cost Management, and Enterprise Asset Management transactions that prevent or delay period close activity. This page displays Period Health Check Metrics, along with bucketing transactions based on time (for example; lag days) with respect to the current date, and Top Ten Organizations Tag Cloud Transactions Distribution by Organization charts and results tables across various tabs by grouping relevant data together and a Transaction Details results table.

- **Transaction Accounting Register**: This page lets you search and display all material, manufacturing, receiving, and write-off transaction accounting information across the respective subledger along with corresponding SLA and GL accounting information. This page displays transaction details, charts, and results table.

This chapter provides product-specific details required to integrate Oracle E-Business Suite Information Discovery with Oracle E-Business Suite Release 12.2 V8 for Oracle Cost Management. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

> **Note:** Landed Cost Management Information Discovery pages are included in the Cost Management Information Discovery: Landed Cost Management product.

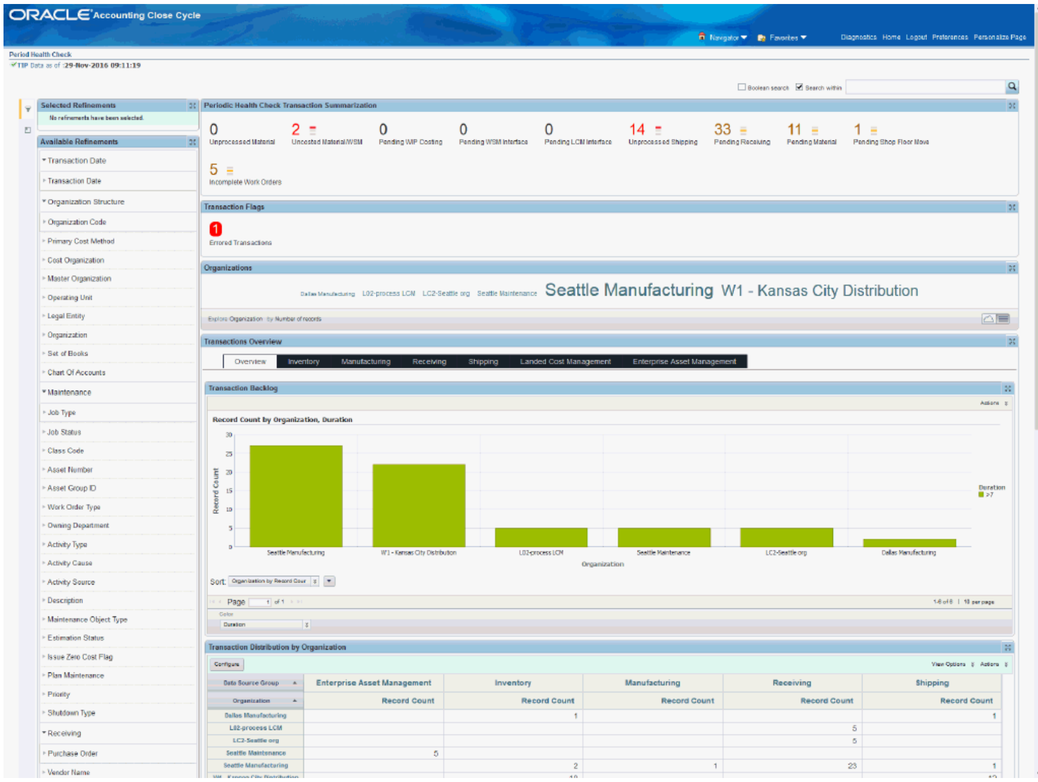
Oracle Cost Management Information Discovery Plus User Interfaces

Period Health Check Page

The Period Health Check page lets you search for and display Inventory, Manufacturing, Receiving, Shipping, Landed Cost Management, and Enterprise Asset Management transactions that are preventing period close, as well as transactions that are to be reviewed and preferably processed but are not necessary for period close. Using the Guided Navigation and other search features, you can search on Organization, Transaction, Job, Receiving, Maintenance, Project, and Inter Organization Transfer data. You can view period close metrics, charts, and transaction data displayed in results tables. The following is a display of the Period Health Check page.

From the Cost Management responsibility, navigate to the Period Health Check page:

(N) Cost > Accounting Close Cycle > Period Health Check



You can use the Period Health Check page to view transactions that could prevent or delay period close. You can analyze data and review transaction metrics, charts, graphs, and tables. The following describes the Cost Management Information Discovery Period Health Check page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Available Refinements</td><td>The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names:
• Transaction Date
• Organization Structure
• Maintenance
• Receiving
• Job
• Transaction
• Inter Organization Transfer</td></tr>
<tr><td>Period Health Check Transaction Summarization

Note: The Metric Components are color coded to highlight warnings and health:

- Red: Critical warning state

- Yellow: Warning state

- Gray: Normal

- Green: Good</td><td>• Unprocessed Material
• Uncosted Material/WSM
• Pending WIP Costing
• Pending WSM Interface
• Pending LCM Interface
• Unprocessed Shipping
• Pending Receiving
• Pending Material
• Pending Shop Floor Move
• Incomplete Work Orders</td></tr>
</table>

Region	Components
Organizations (tag cloud)	Top Ten Organizations Tag Cloud Component **Note:** The Organizations tag cloud component displays the top ten organizations having the most transactions displayed in relative sizes by frequency of occurrence.

Transactions Overview (tabbed component container)
 	
Overview (tab)
	Transaction Backlog (chart)
	
	• Sort Options
	    • Organization
	    • Organization by Record Count
	• Series Dimensions (color)
	    • (none)
	    • Duration
	
	Transaction Distribution by Organization (cross tab)
	
	Note: The Overview - Transactions Distribution by Organization cross tab displays the transaction counts grouped by Functional Group and Organization.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Transactions Overview (tabbed component container)

The tabbed container includes tabs for each of the following transaction sources:
Inventory (tab)
Manufacturing (tab)
Receiving (tab)
Shipping (tab)
Landed Cost Management (tab)
Enterprise Asset Management (tab)</td><td>Transaction Distribution by Organization (chart)

Note: The Transaction Distribution by Organization chart displays the transaction counts grouped by Transaction Source and Organization.
Sort Options
Organization
Organization by Record Count
Series Dimensions (color)
(none)
Data Source
Transaction Distribution by Organization (cross tab)

Note: The Transaction Distribution by Organization cross tab displays the counts of transactions grouped by Source Type and Organization.

Transaction Details (results table)

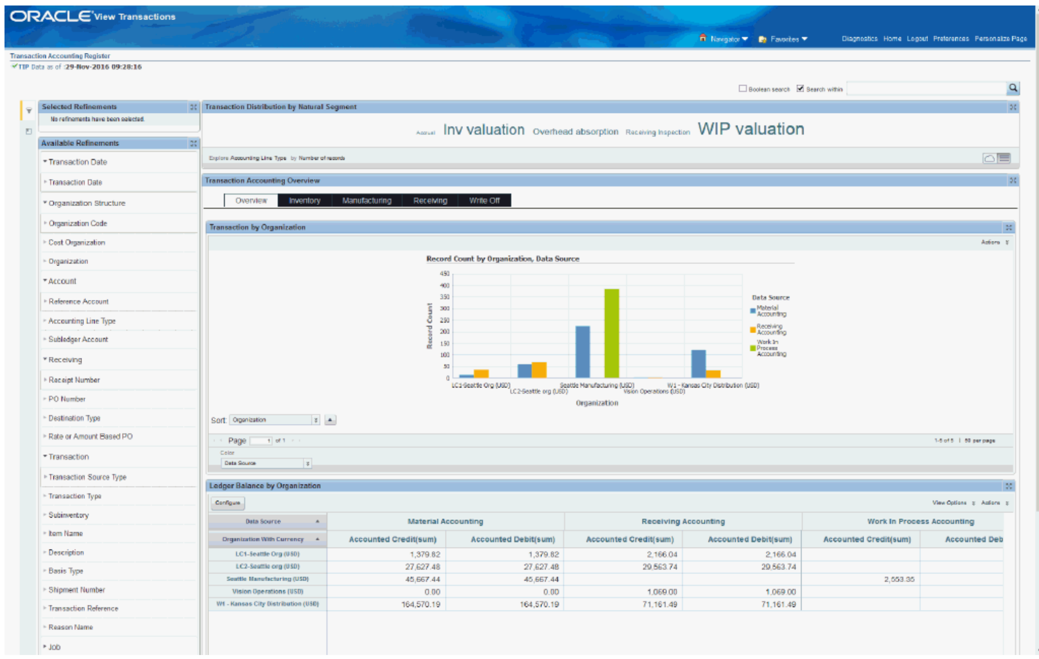
Note: The Transaction Details results table displays all attributes pertaining to the transactions and are grouped into column sets. Each column set contains a subset of logically related and relevant columns. Therefore, there is no need for long scrolls to view all the transaction details.</td></tr>
</table>

Transaction Accounting Register Page

The Transaction Accounting Register page displays material, manufacturing, receiving, and write-off transaction accounting information along with SLA and GL accounting (if transferred to GL in detail mode). Using the Guided Navigation, you can search on various attributes classified under Organization, Job, Account, Transaction, Receiving, and Write-off attribute groups. You can view Transaction Distributions Overview charts, graphs and Subledger results tables. The following is a display of the Transaction Accounting Register page.

From the Cost Management responsibility, navigate to the Transaction Accounting Register page:

(N) Cost > View Transactions > Transaction Accounting Register



You can use the Transaction Accounting Register page to view charts, graphs, and tag clouds for insights into Transaction Accounting Distributions. The following describes the Oracle Information Discovery Cost Management Transaction Accounting Register page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Transaction Date • Organization Structure • Account • Receiving • Transaction • Write Off • Job
Transaction Distributions by Natural Segment (tag cloud)	Top Ten Transaction Distributions by Natural Segment Tag Cloud Component **Note:** The Transaction Distributions by Natural Segment tag cloud component displays the top ten Natural Segment Accounts based on the accounting distributions displayed in relative sizes by frequency of occurrence.

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Overview (tab)
	Transactions by Organization (chart)
	
	Note: The Overview - Transaction by Organization chart displays distributions of the number of transactions by Organizations stacked by Source Type of the transactions.
	
	• Sort Options
	  • Organization
	  • Organization by Record Count
	• Series Dimensions (color)
	  • (none)
	  • Data Source
	
	Ledger Balance by Organization (cross tab)
	
	Note: The Overview - Ledger Balance by Organization cross tab displays ledger balances for all Organizations.
	
	• View Options
	  • Conditional Formatting
	  • Summaries
	  • Grand Summary
	• Actions
	  • Export to Microsoft Excel
	  • Print

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Inventory (tab)
	Transaction Value by Organization (chart)
	• Sort Options
	  • Organization
	  • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	  • (none)
	  • Accounting Line Type
	
	Inventory Subledger (cross tab)
	• Column Sets
	  • Transaction Details
	  • Organization Attributes
	  • Manufacturing Attributes
	  • Purchasing Attributes
	  • SLA Accounting
	  • GL Journals
	  • SLA and GL Accounting
	  • Inventory Attributes
	  • Inventory Subledger Accounting
	• View Options
	  • Hide / Show Columns
	  • Sort

Region	Components

	• Reset table to default
	• Actions
	  • Print
	  • Export to Microsoft Excel

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Manufacturing (tab)
	Transaction Value by Organization (chart)
	
	• Sort Options
	  • Organization
	  • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	  • (none)
	  • Accounting Line Type
	
	Manufacturing Subledger (cross tab)
	
	• Column Sets
	  • Transaction Details
	  • Organization Attributes
	  • Work-In-Process Subledger Accounting
	  • Purchasing Attributes
	  • SLA Accounting
	  • GL Journals
	  • SLA and GL Accounting
	  • Manufacturing Attributes
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Region	Components

	• Actions
	  • Print
	  • Export to Microsoft Excel

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Receiving (tab)
	Transaction Value by Organization (chart)
	• Sort Options
	  • Organization
	  • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	  • (none)
	  • Accounting Line Type
	
	Receiving Subledger (cross tab)
	• Column Sets
	  • Transaction Details
	  • Organization Attributes
	  • Receiving Subledger Accounting
	  • Receiving Attributes
	  • Purchasing Attributes
	  • Job Attributes
	  • SLA Accounting
	  • GL Journals
	  • SL and GL Accounting
	• View Options
	  • Hide / Show Columns
	  • Sort

Region	Components
	- Reset table to default • Actions - Print - Export to Microsoft Excel

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Write Off (tab)
	Transaction Value by Organization (chart)
	• Sort Options
	  • Organization
	  • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	  • (none)
	  • Accounting Line Type
	
	Receiving Subledger (cross tab)
	• Column Sets
	  • Transaction Details
	  • Organization Attributes
	  • Invoice Attributes
	  • Receiving Attributes
	  • Inventory Attributes
	  • SLA Accounting
	  • GL Journals
	  • SLA and GL Accounting
	  • Write-off Attributes
	• View Options
	  • Hide / Show Columns
	  • Sort

Region	Components
	- Reset table to default - Actions - Print - Export to Microsoft Excel

Oracle Cost Management Information Discovery Plus Product Configuration

Setting Up Oracle Cost Management Information Discovery Plus

The Oracle Cost Management application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Cost Management Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 7-21 by assigning UMX roles and updating access grants.

2. Load Cost Management data to the Endeca data domain, page 7-22 by running graphs provided by Cost Management.

3. Schedule Setup for Full Endeca Refresh., page 7-23

4. Set Profile Options., page 7-25

Access Control: Hide and Show Information Discovery Dashboards (User Interfaces) for Oracle Cost Management

As part of the Oracle E-Business Suite Information Discovery integration for the Oracle Cost Management application, the following UMX Roles are provided:

UMX Role	Internal Code Name
Costing Endeca Period Health Check Access Role	UMX|CST ENDECA PRD HLTH CHK ACCESS ROLE
Costing Endeca Transaction Accounting Register Access Role	UMX|CST ENDECA TXN REG ACCESS ROLE

You must add the new UMX roles 'Costing Endeca Period Health Check Access Role' (Internal Code Name: UMX|CST ENDECA PRD HLTH CHK ACCESS ROLE) and 'Costing Endeca Transaction Accounting Register Access Role' (Internal Code Name:

UMX|CST ENDECA TXN REG ACCESS ROLE) to enable Endeca menus for the Cost Management responsibility (or any other custom responsibility which is using the same menu). You must assign these UMX roles to the responsibility. When these UMX roles are assigned to the Cost Management Information Portal, the Endeca Cost Management menus appear.

If you want to use the Endeca-related roles with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process instead while you are adding the role to the responsibility.

Complete the following steps to enable Information Discovery Menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.
2. Update CST_ENDECA_ACCESS_GRANT Grant.

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Loading Cost Management Data into the Endeca Data Domain

Clover ETL within Endeca queries Cost Management views and processes full or incremental data load to the Cost Management data stores in Endeca. There are two Cost Management data stores:

- **bom-cstphc** - Period Health Check page
- **bom-csttar** - Transaction Accounting Register page

First, set up the Profile CST:Endeca Txn Reg Start Date (DD-MON-YYYY) to a date which lowers cutoff date for the accounting data that is loaded into Endeca server for the Transaction Accounting Register. Then, run the first full data load. Incremental data load can be performed periodically. Incremental data load will update all the records in the Endeca Cost Management data stores which were updated in EBS after the last load. After the data has been loaded in the Cost Management data stores, it can be queried and shown in the Cost Management Information Discovery pages. For the Period Health Check data domain, there is only a full load graph because of the nature of data where successfully processed transactions must be removed.

Cost Management Data Sources in the Cost Management Data Domain

Period Health Check uses parent and child data sources. The parent data source contains all transactions and the child data source contains transactions for a specific tab. Data sources include:

- **bom-cstphc**: This data source is the parent data source referring to the data domain of the same name. This data source contains data for all transaction sources and is used for the Overview tab, Search, Summarization Bar, Alerts, Available

Refinements, Selected Refinements, and Organization Cloud.

- **bom-cstphcinv**: This data source is the child data source containing content for inventory transactions and is used for the Inventory tab.

- **bom-cstphcwip**: This data source is the child data source containing content for manufacturing transactions and is used for the Manufacturing tab.

- **bom-cstphcrcv**: This data source is the child data source containing content for receiving transactions and would is used for the Receiving tab.

- **bom-cstphcwsh**: This data source is the child data source containing content for shipping transactions and is used for the Shipping tab.

- **bom-cstphclcm**: This data source is the child data source containing content for Landed Cost Management transactions and is used for the Landed Cost Management tab.

- **bom-cstphceam**: This data source is the child data source containing content for Enterprise Asset Management transactions and is used for the Enterprise Asset Management tab.

The Transaction Accounting Register also uses parent and child data sources. The parent data source contains all transactions and the child data source contains transactions for a specific tab. Data sources include:

- **bom-csttar**: This data source is the parent data source referring to the data domain of the same name. This data source contains data for all transaction sources and is used for the Overview tab, Search, Available Refinements, Selected Refinements, and the Natural Segment tag cloud.

- **bom-csttarinv**: This data source is the child data source containing content for Inventory transactions is used for the Inventory tab.

- **bom-csttarwip**: This data source is the child data source containing content for Manufacturing transactions and is used for the Manufacturing tab.

- **bom-csttarrcv**: This data source is the child data source containing content for Receiving transactions and is used for the Receiving tab.

- **bom-csttarwof**: This data source is the child data source containing content for Write-Off transactions and is used for the Write Off tab.

Setting Up the Scheduler for Endeca Full Refresh

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc

ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select the graph for schedule to run. I.e. Full.grf/incremental.grf.
13. Click Create to set the scheduler.

ETL Parameters for Cost Management

You can load data to the Cost Management data domain by running graphs provided by Cost Management.

To load data to the Cost Management Data Domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under Cost Management.
2. Graphs to load data include:
   - **FullLoadConfig.grf**: This graph is a full data load for the Period Health Check page (incremental load is not applicable).

- **FullLoadConfig.grf**: This graph is a full data load for the Transaction Accounting Register page.
- **IncrementalLoadConfig.grf**: This graph loads incrementally changed data for the Transaction Accounting Register page.

Endeca ETL Parameters for Period Health Check

```
##### Endeca Server Specifics ######
ENDECA_SERVER_HOST=localhost
ENDECA_SERVER_PORT=7770
DATA_STORE_NAME=bom-cstphc

##### Data Store Specifics ######
MDEX_EXTRA_ARGS=<server-control:arg>--threads</server-control:
arg><server-control:arg>4</server-control:arg>
MDEX_PORT=9901
MDEX_BULK_PORT=9902
MDEX_TRANSACTION_ID=
```

Endeca ETL Parameters for Transaction Accounting Register

```
##### Endeca Server Specifics ######
ENDECA_SERVER_HOST=localhost
ENDECA_SERVER_PORT=7770
DATA_STORE_NAME=bom-csttar

##### Data Store Specifics ######
MDEX_EXTRA_ARGS=<server-control:arg>--threads</server-control:
arg><server-control:arg>4</server-control:arg>
MDEX_PORT=9601
MDEX_BULK_PORT=9602
MDEX_TRANSACTION_ID=

##### EBS FND Table Specifics #####
LANGUAGE_CODE=US
INSTANCE_ID=204
LOAD_TYPE=F
FND_USER=1
RECORD_TYPE=bom-csttar

### Misc ########
MULTIASSIGN_DELIMITER=\u007F

##### Sample Load View view_config.xml Location #####
viewXMLFile=sandbox://bom-csttar/data-out/view_config.xml
```

Profile Options for Cost Management

You must set the following profile option to load all data from a specified date for the Transaction Accounting Register page.

Profile Option Name	Description
CST:Endeca Txn Reg Start Date (mm-dd-yyyy)	This profile option defines the start date from which the data is selected for full load of the Transaction Accounting Register.

Views and Joins for Cost Management

The following views are used by the ETL layer in Endeca to load Cost Management data to the Endeca data domain:

TAR:

View	Purpose
CST_END_ORG_STRUCTURE_V	Denormalized view for organization structure details.
CST_END_TXN_REG_INV_V	View for accounting information of inventory transactions.
CST_END_TXN_REG_RCV_V	View for accounting information of receiving transactions.
CST_END_TXN_REG_WIP_V	View for accounting information of WIP transactions.
CST_END_TXN_REG_WO_V	View for accounting information of write-offs.
CST_END_TXN_REG_FULL_LOAD_V	Denormalized view for Receiving, Inventory, WIP, and Write-off accounting (Full Load).
CST_END_TXN_REG_INCREMENTAL_V	Denormalized view for Receiving, Inventory, WIP, and Write-off accounting (Incremental Load).

PHC:

View	Purpose
CST_END_ORG_STRUCTURE_V	Denormalized view for organization structure details.
CST_END_PHC_EAM_WO_V	View for pending work order details.
CST_END_PHC_INVENTORY_TXNS_V	View for pending / unprocessed / uncosted inventory transactions.
CST_END_PHC_LCM_INT_TXNS_V	View for pending LCM transactions.
CST_END_PHC_RCV_INT_TXNS_V	View for pending receiving transactions.
CST_END_PHC_WMTI_V	View for pending WIP / Move transactions.
CST_END_PHC_WSH_UNP_TXNS_V	View for unprocessed shipping transactions.
CST_END_PHC_WSM_INT_TXNS_V	View for pending WSM transactions.
CST_END_PRD_HLTH_CHK_MAIN_V	Denormalized view for all pending transactions.

Note: CST_END_ORG_STRUCTURE_V is common to both TAR and PHC.

Menus for Oracle Cost Management Information Discovery Plus

Oracle Cost Management Information Discovery Plus integration includes the following user menu functions:

User Function Name	Function Name
Costing Endeca Period Health Check Function	CST_ENDECA_PERIOD_HLTH_CHECK
Costing Period Health Check OA Page	CST_ENDECA_PRD_HLTH_CHK_OA

User Function Name	Function Name
Costing Endeca Transaction Accounting Register Function	CST_ENDECA_TXN_ACCT_REG
Costing Transaction Accounting Register OA Page	CST_ENDECA_TXN_ACCT_REG_OA

8

Oracle Cost Management Information Discovery: Landed Cost Management

This chapter covers the following topics:

Overview

You can use Oracle Cost Management Information Discovery: Landed Cost Management to search and filter landed cost information that includes:

- Major landed cost players
- Landed cost allocation profiles
- Historic landed cost information

- Unplanned landed costs
- Comparison of item landed cost information
- Shipments with pending actions
- Shipments with unmatched amounts

Using the Landed Cost Management workbench pages, you can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using Landed Cost Management pages and Information Discovery design tools. These pages are hosted in an Endeca Information Discovery (EID) environment, and called from new container pages in EBS. In Landed Cost Management, the following pages enable search functions using Information Discovery integration:

- **Monitor Daily Operations**: The Monitor Daily Operations page provides details of the pending activities on the Landed Cost shipments.
- **Landed Cost Analysis**: The Landed Cost Analysis page provides an in-depth understanding of the landed cost allocation across inventories, and includes supply information, item information, and purchase order information.

> **Note:** Landed Cost Management Information Discovery pages are included in the Cost Management Information Discovery product.

This chapter provides product-specific details required to integrate Oracle E-Business Suite Information Discovery with Oracle E-Business Suite Release 12.2 V8 for the Oracle Landed Cost Management application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must review this document and make note of the requirements before you begin your installation.

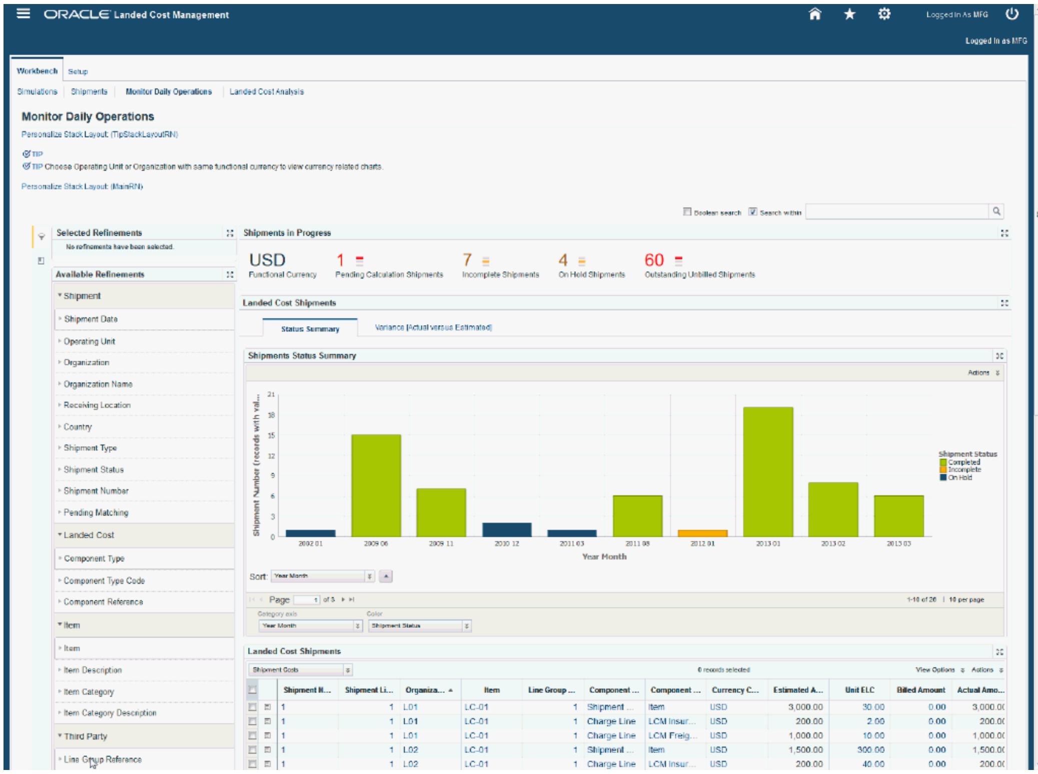
Oracle Cost Management Information Discovery: Landed Cost Management User Interfaces

Monitor Daily Operations Page

The Monitor Daily Operations page displays the pending activities on the Landed Cost shipments and displays the necessary information for the LCM users to quickly identify transactions that must be corrected or require additional steps to complete the Landed Cost shipment lifecycle. You can filter and view transaction information from Landed Cost Management, Purchasing, and Receiving. Integration to the Shipments Workbench allows you to perform all actions available in the Landed Cost Management application. The following is a partial display of the Endeca Monitor Daily Operations page.

From the Landed Cost Management responsibility, navigate to the Monitor Daily Operations page:

(N) Workbench > Monitor Daily Operations



Within the Monitor Daily Operations page, you can track pending activities on the landed cost shipments. You can analyze data and review shipment metrics, charts, graphs, and tables. The following describes the Monitor Daily Operations page regions and components:

> **Note:** Charts do not display landed cost information if the data contains multiple functional currencies. In such situations, the Functional Currency metric displays 'Multiple'. Use Available Refinements to filter the landed cost transactions with a single currency to visualize landed coast information in the charts. For example, you can use Operating Unit and Organization from the Shipments attributes group.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Advanced Search
Boolean Search
Search within</td><td>The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.

Partial record search is enabled for specific attributes. Attributes for partial record search include:
Component Reference
Component Type Code
Component Type
Organization
Name
Item
Item Description
Party
Party Site
Item Category
Item
Category Description</td></tr>
</table>

Region	Components
	• Line Group Reference
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Shipment
	  • Shipment Date
	  • Operating Unit
	  • Organization
	  • Organization Name
	  • Receiving Location
	  • Country
	  • Shipment Type
	  • Shipment Status
	  • Shipment Number
	  • Pending Matching
	• Landed Cost
	  • Component Type
	  • Component Type Code
	  • Component Reference
	• Item
	  • Item
	  • Item Description
	  • Item Category

Region	Components

	- Item Category Description
	• Third Party
	  - Line Group Reference
	  - Party
	  - Party Site
	  - Party Site Country
	• Purchase Order
	  - PO Creation Date
	  - PO Type
	  - PO Number
	  - PO Agent Name
	  - Supplier Item
	  - PO Line Closed
	  - PO Closed for Invoicing
	  - PO Closed for Receiving
	• Receiving
	  - Receipt Number
	  - Ship to Location
	  - Bill Of Lading
	  - Packing Slip
	  - Waybill Airbill

Region	Components
	- Deliver to Location • Period - Year - Year Week - Year Month - Year Quarter • Shipment Headers (descriptive flexfield attributes) - Shipment Header (descriptive flexfield) • Shipment Lines (descriptive flexfield attributes) - Shipment Line (descriptive flexfield)

Region	Components
Shipments in Progress (summarization Bar) **Note:** The Metric Components are color coded to highlight warnings and health:	• **Functional Currency** Displays the functional currency code. This displays 'Multiple' if the shipment lines contain more than one functional currency. There is no color coding for this component. • **Pending Calculation Shipments** Displays the number of distinct shipments with the Pending Matching flag as 'Yes'. Green: count = 0 Red: count > 0 • **Incomplete Shipments** Displays the number of distinct shipments with 'Incomplete' status. Green: No Shipments (count < 5) Yellow: Under 15 (count between 5 and 15) Red: Above 15 (count > 15) • **On-Hold Shipments** Displays the number of distinct shipments with 'On Hold' status. Green: No Shipments (count = 0) Yellow: Under 5 (count between 1 and 5) Red: Above 5 (count > 5) • **Outstanding Unbilled Shipments** Displays the number of distinct shipments with 'Unbilled' status. Green: count = 0 Yellow: Under 15 (count between 1 and 15)

Region	Components
	Red: Above 15 (count > 15)

Region	Components

Landed Cost Shipments (tabbed container component)
 	
Status Summary (tab)
	Shipments Status Summary (chart)
	• Sort Options
	  • Year Month
	  • Year Month by Shipment Number (records with values)
	• Group Dimensions (category axis)
	  • Year Month
	  • Year Quarter
	  • Year Week
	  • PO Number
	  • Receipt Number
	• Series Dimensions (color)
	  • (none)
	  • Shipment Satus
	
	Landed Cost Shipments (results table)
	• Column Sets
	  • Shipment Costs
	  • Shipment Details
	  • Receipt Details
	  • Periods and Dates
	  • Header Descriptive Flexfield
	  • Line Descriptive Flexfield

Region	Components

	• Actions
	  • Print
	  • Export
	  • Compare
	  • Manage Shipments
	• Links
	  • Details Icon - select the details icon to open the record details window for the selected row.

Region	Components

Landed Cost Shipments (tabbed container component)
 	
Variance [Actual versus Estimated] (tab)
	Unbilled Amount by Party (chart)
	• Sort Options
	  • Party
	  • Party by Unmatched Amount (sum)
	• Group Dimensions (category axis)
	  • Party
	  • Party Site
	  • Item
	  • Item Category
	  • PO Number
	  • Shipment Number
	  • Receipt Number
	  • Year Week
	  • Year Month
	  • Year Quarter
	• Series Dimensions (color)
	  • (none)
	  • Component Type
	  • Component Reference
	
	Unbilled and Partially Billed Shipments (results table)
	• Column Sets

Region	Components

	• Shipment Costs
	• Shipment Details
	• Receipt Details
	• Periods and Dates
	• Header Descriptive Flexfield
	• Line Descriptive Flexfield
	• Actions
	  • Print
	  • Export
	  • Compare
	  • Manage Shipments
	• Links
	  • Details Icon - select the details icon to open the record details window for the selected row.

Landed Cost Analysis Page

The Landed Cost Analysis page provides an in-depth understanding of the landed cost allocation across inventories, and includes supply information, item information, and purchase order information. The following is a partial display of the Landed Cost Analysis page.

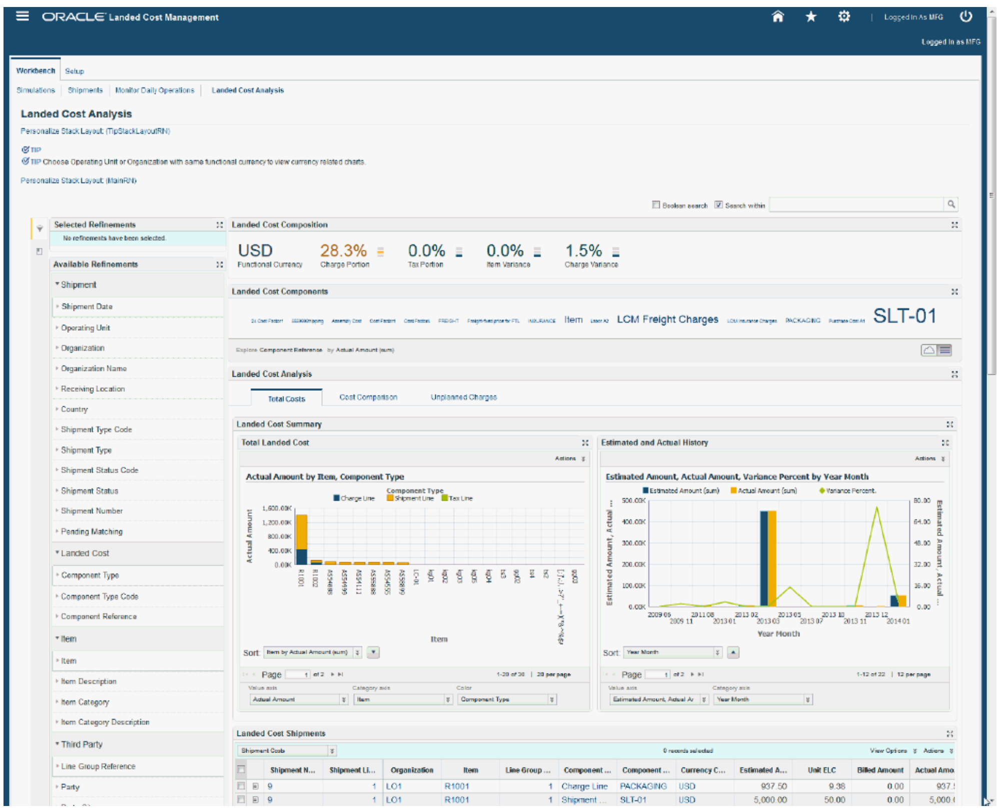
From the Landed Cost Management responsibility, navigate to the Landed Cost Analysis page:

(N) Workbench > Landed Cost Analysis

Within the Information Discovery regions on the Landed Cost Analysis page, you can:

- View the amount that is invested in charges during the procurement cycle.

- Identify the landed cost allocation profile for items, considering variables such as country of origin, third party suppliers, receiving organizations, and so on.
- Review trends and variances from estimated to invoiced information.
- View non-planned cost factors billed without the corresponding estimated amounts.
- Search for historic landed cost information of an item to drive future sourcing negotiations.



You can analyze data and view metrics, charts, graphs, and tables. The following describes the Information Discovery Landed Cost Analysis page regions and components:

> **Note:** Charts do not display landed cost information if the data contains multiple functional currencies. In such situations, the Functional Currency metric displays 'Multiple'. Use Available Refinements to filter the landed cost transactions with a single currency to visualize landed coast information in the charts. For example, you can use Operating Unit and Organization from the Shipments attributes group.

Region	Components

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Advanced Search
• Boolean Search
• Search within</td><td>The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.

Partial record search is enabled for specific attributes. Attributes for partial record search include:
• Component Reference
• Component Type Code
• Component Type
• Organization
• Name
• Item
• Item Description
• Party
• Party Site
• Item Category
• Item
• Category Description</td></tr>
</table>

Region	Components
	• Line Group Reference
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Shipment
	  • Shipment Date
	  • Operating Unit
	  • Organization
	  • Organization Name
	  • Receiving Location
	  • Country
	  • Shipment Type Code
	  • Shipment Type
	  • Shipment Status Code
	  • Shipment Status
	  • Shipment Number
	• Landed Cost
	  • Component Type
	  • Component Type Code
	  • Component Reference
	• Item
	  • Item
	  • Item Description

Region	Components
	- Item Category - Item Category Description - Third Party - Line Group Reference - Party - Party Site - Party Site Country - Purchase Order - PO Creation Date - PO Type - PO Number - PO Agent Name - Supplier Item - PO Line Closed - PO Closed for Invoicing - PO Closed for Receiving - Receiving - Receipt Number - Ship to Location - Bill Of Lading - Packing Slip

Region	Components
	- Waybill Airbill - Deliver to Location - Period - Year - Year Week - Year Month - Year Quarter - Shipment Headers (descriptive flexfield attributes) - Shipment Header (descriptive flexfield) - Shipment Lines (descriptive flexfield attributes) - Shipment Line (descriptive flexfield)

Region	Components
Landed Cost Composition (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health:	• **Functional Currency** Displays the functional currency code. This displays 'Multiple' if the shipment lines contain more than one functional currency. There is no color coding for this component. • **Charge Portion** Displays the percentage of charge included in the total landed cost of selected data when all of the selected shipments have the same functional currency. Green: Under 20% Yellow: Between 20% and 40% Red: Over 40% • **Tax Portion** Displays the percentage of tax included in the total landed cost of selected data when all of the selected shipments have the same functional currency. Green: Under 15% Yellow: Between 15% and 30% Red: Over 30% • **Item Variance** Displays the item variance percent from the estimated and actual amounts of selected data when all of the selected shipments have the same functional currency. Green: Under 5% Yellow: Between 5% and 15% Red: Over 15%

Region	Components
	• **Charge Variance** Displays the charge variance percent from the estimated and actual amounts of selected data when all of the selected shipments have the same functional currency. Green: Under 5% Yellow: Between 5% and 25% Red: Over 25%
Landed Cost Components (tag cloud)	Top Ten Landed Cost Components Tag Cloud Component **Note:** The Landed Cost Components tag cloud displays the top fifteen Landed Cost components considering total actual landed cost.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Landed Cost Analysis (tabbed container component)

Total Costs (tab)</td><td>The Landed Cost Summary Component Container contains the following:

Total Landed Cost (chart)

Sort Options
Item
Item by Actual Amount (sum)
Dimensions (Value axis)
Actual Amount
Unit ALC
Estimated Amount
Unit ELC
Variance Amount
Variance Percent
Group Dimensions (Category axis)
Item
Item Category
Organization
Receiving Location
Party
Party Site
Party Site Country
PO Number
</td></tr>
</table>

Region	Components
	- Shipment Number - Receipt Number - Year Month - Year Week - Year Quarter • Series Dimensions (Color) - (none) - Component Type - Component Reference Estimated and Actual History (chart) • Metrics - Bars: Estimated Amount (sum), Actual Amount (sum); Line: Variance Percent (Predefined Metric) - Bars: Unit ELC (Predefined Metric), Unit ALC (Predefined Metric); Line: Variance Percent (Predefined Metric) - Bar: Variance Amount (sum); Line: Variance Percent (Predefined Metric) • Sort Options - Year Month - Year Month by Estimated Amount (sum) - Year Month by Actual Amount (sum) - Year Month by Variance Percent

Region	Components

	• Dimensions (Value axis)
	  • Estimated Amount, Actual Amount, Variance Percent
	  • Unit ELC, Unit ALC, Variance Percent
	  • Variance Amount, Variance Percent
	• Group Dimensions (Category axis)
	  • Year Month
	  • Year Week
	  • Year Quarter
	  • Item
	  • Item Category
	  • Organization
	  • Receiving Location
	  • Party
	  • Party Site
	  • Party Country
	  • PO Number
	  • Shipment Number
	  • Receipt Number
	Landed Cost Shipments (results table)
	• Column Sets
	  • Shipment Costs

Region	Components
	- Shipment Details - Receipt Details - Periods and Dates - Header Descriptive Flex Field - Line Descriptive Flex Field - Actions - Print - Export - Compare - Manage Shipments - Links - Details Icon - select the details icon to open the Record Details window for the selected row.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Landed Cost Analysis (tabbed container component)

Cost Comparison (tab)</td><td>Cost Trends (chart)
• Sort Options
  • Year Month
  • Year Month by Unit ALC
• Dimensions (Value axis)
  • Unit ALC
  • Unit Item ALC
  • Unit Charge ALC
  • Unit Tax ALC
• Group Dimensions (Category axis)
  • Year Month
  • Year Week
  • Year Quarter
• Series Dimensions (Color)
  • (none)
  • Party
  • Party Site
  • Party Site Country
  • Item
  • Item Category
  • Organization
  • Receiving Location</td></tr>
</table>

Region	Components

	- PO Number
	
	Cost Comparison Details (results table)
	- Column Sets
	  - Total Costs
	  - Shipment Details
	  - Item Cost
	  - Charge Cost
	  - Tax Cost
	  - Header Descriptive Flex Field
	  - Line Descriptive Flex Field
	- Actions
	  - Print
	  - Export
	  - Compare
	- Links
	  - Details Icon - select the details icon to open the Record Details window for the selected row.

<table>
<thead>
<tr><th>Region</th><th>Components</th></tr>
</thead>
<tbody>
<tr><td>Landed Cost Analysis (tabbed container component)

Unplanned Charges (tab)</td><td>Unplanned Charges (chart)

Sort Options
Party
Party by Actual Amount (sum)
Dimensions (value axis)
Unplanned Costs
Unplanned Costs Per Unit
Group Dimensions (category axis)
Party
Party Site
Party Site Country
Item
Item Category
Organization
PO Number
Shipment Number
Receipt Number
Year Month
Year Week
Year Quarter
Series Dimensions (color)
(none)
</td></tr>
</tbody>
</table>

Region	Components

	• Component Reference
	• Component Type
	
	Unplanned Charge Details (results table)
	• Column Sets
	  • Unplanned Charge
	  • Shipment Details
	  • Header Descriptive Flex Field
	  • Line Descriptive Flexfield
	• Actions
	  • Print
	  • Export
	  • Compare
	  • Manage Shipments
	• Links
	  • Details Icon - select the details icon to open the Record Details window for the selected row.

Oracle Cost Management Information Discovery: Landed Cost Management Product Configuration

Setting Up Landed Cost Management

The Oracle Landed Cost Management application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Financials Information Discovery: Landed Cost Management, you must complete the following steps:

1. Set Access Control, page 8-33 by assigning UMX roles and updating access grants.
2. Load LCM data to the Endeca Data Domain, page 8-35 by running graphs provided by LCM.
3. Schedule Setup for Full Endeca Refresh, page 8-35.
4. Set Profile Options, page 8-36.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Landed Cost Management

As part of the Oracle E-Business Suite-EID integration for the Oracle Landed Cost Management application, the following UMX Roles are provided:

UMX Role	Internal Code Name
INL Monitor Daily Operations Endeca Access Role	UMX|INL_MDO_ENDECA_ACCESS_ROLE
INL Landed Cost Analysis Endeca Access Role	UMX|INL_LCA_ENDECA_ACCESS_ROLE

You must add the new UMX roles 'INL Monitor Daily Operations Endeca Access Role' (Internal Code Name: UMX|INL_MOD_ENDECA_ACCESS_ROLE) and 'INL Landed Cost Analysis Endeca Access Role' (Internal Code Name:

UMX|INL_LCA_ENDECA_ACCESS_ROLE) to enable Information Discovery menus for the Landed Cost Management responsibility (or any other custom responsibility which is using the same menu). You must assign these UMX roles to the responsibility. When these UMX roles are assigned to the Landed Cost Management responsibility, the Monitor Daily Operations and Landed Cost Analysis pages appear.

If you want to use the Endeca-related roles with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process while you are adding the role to the responsibility.

Landed Cost Management includes separate Permissions, Grants, and Roles for each page due to the sensitive costing information displayed on the Landed Cost Analysis page. The following are the Landed Cost Management Permission Sets, Grants, and Roles for the Monitor Daily Operations page and Landed Cost Analysis page.

Permission Sets	Internal Code Name
Monitor Daily Operations page	INL_MDO_ENDECA_ACCESS_PS
Landed Cost Analysis page	INL_LCA_ENDECA_ACCESS_PS

Grants	Internal Code Name
Monitor Daily Operations page	INL_MDO_ENDECA_ACCESS_GRANT
Landed Cost Analysis page	INL_LCA_ENDECA_ACCESS_GRANT

Roles	Internal Code Name
Monitor Daily Operations page	INL_MDO_ENDECA_ACCESS_ROLE
Landed Cost Analysis page	INL_LCA_ENDECA_ACCESS_ROLE

Complete the following steps to enable Information Discovery menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.
2. Update INL_MOD_ENDECA_ACCESS_GRANT and INL_LCA_ENDECA_ACCESS_GRANT.

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Loading Landed Cost Data into the Endeca Data Domain

Clover ETL within Endeca queries LCM Views and does a full data load to the LCM data domain in Endeca. After the first data load, full data load or incremental data load can be performed periodically. Incremental data load will update all the records in the Endeca LCM data domain which were updated in EBS after the last load. After the data has been loaded in the LCM data domain, it can be queried and shown in the LCM pages.

LCM Data Sources in the LCM Data Domain

Data sources are defined in the LCM Data Domain in Endeca and are used to query data for different pages in LCM. These data sources include:

inl-lc: This data source queries data for the Monitor Daily Operations and Landed Cost Analysis pages.

Setting Up the Scheduler for Endeca Full Refresh

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Start a graph from the Task Type list.

12. Select the graph for schedule to run. I.e. Full.grf/incremental.grf.

13. Click Create to set the scheduler.

ETL Parameters for Landed Cost Management

You can load data to the LCM data domain by running graphs provided by LCM.

To load data to the LCM data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node. The LCM sandbox is **inl-lc**.

2. Graphs to load data include:

   - FullLoadConfig.grf

   - IncrLoadConfig.grf

   - LoadDataFull.grf

   - LoadDataIncr.grf

Profile Options for Landed Cost Management

You must set the following profile options to control default number of days to be used in the filters of LCM Information Discovery pages. Two profiles are included due to the different range of dates necessary to perform the analysis and actions for each page.

Profile Option Name	Description
INL: Number of Days Filter for Monitor Daily Operations	Default number of days filter for Monitor Daily Operations page.
INL: Number of Days Filter for Landed Cost Analysis	Default number of days filter for Landed Cost Analysis page.

Views and Joins for Landed Cost Management

The following views are used by the ETL layer in Endeca to load LCM data to the Endeca Data Domain:

View Name	Purpose
INL_EID_SHIPMENTS_V	This view is used by the ETL graphs and denormalizes the data from the main LCM (INL) tables, as well as from many other product tables that LCM refers to.

Menus for Landed Cost Management

Landed Cost Management Information Discovery integration includes the following new user menu functions:

User Function Name	Function Name
Monitor Daily Operations - Endeca	INL_ENDECA_SHIP_MONITOR
Landed Cost Analysis - Endeca	INL_ENDECA_LC_ANALYSIS

Endeca Landed Cost Management also includes the following OAF container functions:

User Function Name	Function Name
Monitor Daily Operations	INL_SHIP_MONITOR
Landed Cost Analysis	INL_LC_ANALYSIS

9

Oracle Depot Repair Information Discovery Plus

This chapter covers the following topics:

- Overview
- Oracle Depot Repair Information Discovery Plus User Interface
- Service Orders Dashboard Page
- Supplier Warranty Claims Dashboard Page
- Overview
- Set up Oracle Depot Repair Information Discovery Plus Integration
- Running the Full Load Graph
- Setting Up the Scheduler for Incremental Refresh
- Roles in Oracle Depot Repair Information Discovery Plus
- Grants in Oracle Depot Repair Information Discovery Plus
- Permission Sets in Oracle Depot Repair Information Discovery Plus
- Views and Joins to Load Oracle Depot Repair Information Discovery Plus
- Menus and Functions in Oracle Depot Repair Information Discovery Plus

Overview

You can use Oracle Depot Repair Information Discovery Plus to search and filter the most critical service data in a single location and drill down to get more detailed information enabling you to take action using that information. As a service manager or a service technician, you can access the Repair Orders Dashboard. If you are a claims manager or a claims administrator, then you can access the Supplier Warranty Claims Dashboard. You use these dashboards to review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using Oracle Depot Repair dashboard pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS.

Oracle Depot Repair Information Discovery Plus User Interface and Integration

Oracle Depot Repair Information Discovery Plus User Interface

Oracle Depot Repair Information Discovery Plus consists of two dashboards. Service managers and service technicians can access the Repair Orders Dashboard, and claims managers and claims administrators can access the Supplier Warranty Claims Dashboard.

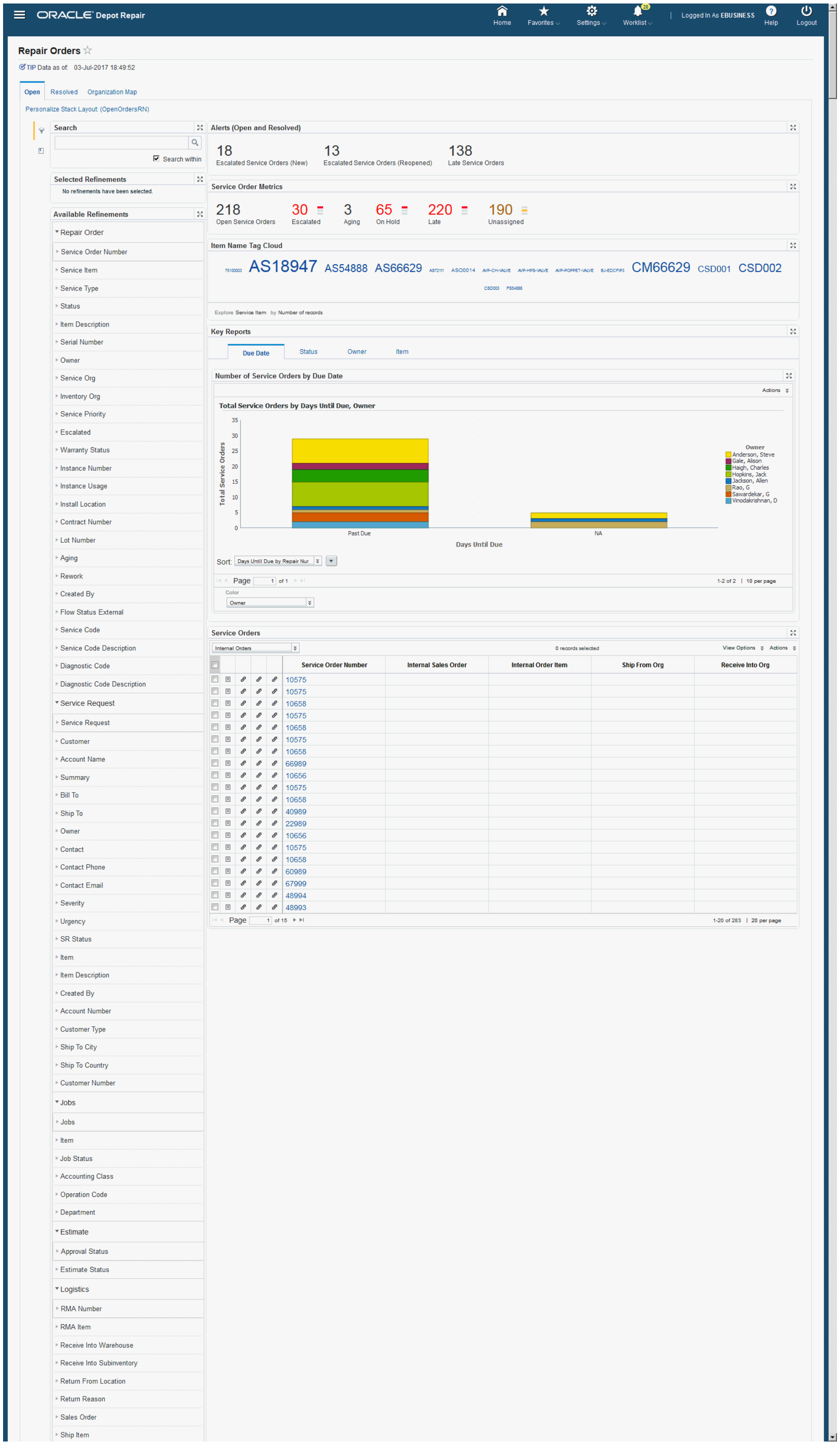
Service Orders Dashboard Page

Service managers and service technicians use the Service Orders Dashboard page to view open and resolved orders to deal with current high-impact issues that need immediate resolution and to gather business intelligence and analysis of historical data. The Service Orders Dashboard page consists of three tabs - Open, Resolved, and Organization Map.

Open Tab

The Open tab in the Service Orders page displays information about open orders and displays information and data graphically and in tabular format. The page consists of the following regions and components:

The Open tab page contains filtering components that you can use to search, navigate and filter the data displayed in other components:



Region	Components
Tip	Displays the date on which the data was last refreshed.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Search
Search Within</td><td>The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.

Partial record search is enabled for specific attributes. Attributes for partial record search include:
Service OrderNumber
Service Item
Service Type
Status
Item Description
Serial Number
Owner
Service Organization
Inventory Organization
Install Location
Contract Number
Lot Number</td></tr>
</table>

Region	Components
	• Customer • Account Name • Summary
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Alerts (Open and Resolved)	Displays the open and resolved alerts.
Service Order Metrics	• Open Service Orders • Escalated Service Orders • Aging • On Hold • Late Service Orders • Unassigned
Item Name Tag Cloud	This tag cloud displays the distribution of all items in the result set.

Region	Components

Key Reports	• Due Date
	  • Number of Service Orders by Due Date
	• Status
	  • Number of Service Orders by Status
	• Owner
	  • Number of Service Orders by Owner
	• Item
	  • Number of Service Orders by Item

Region	Components
Service Orders	• Column Set: Service Order • Launch Technician Portal • Launch Workbench • Launch Service Order Details • Service Order Number • Service Item • Service Type • Status • Quantity • Creation Date • Resolve by Date • Promise Date • Date Closed • Item Description • Serial Number • Owner • Service Org • Inventory Org • Service Priority • Problem Description • Escalated

Region	Components
	• Warranty Status • Instance Number • External Reference • Instance Usage • Install Location • Contract Number • Lot Number • Item Revision • Aging • Rework • Created By • Flow Status External • Quantity Received • Quantity Shipped • Quantity in WIP • Late • Service Code • Service Code Description • Diagnostic Code Description • Root Cause • Root Cause Description

Region	Components

	• Column Set: Service Request
	  • Launch Technician Portal
	  • Launch Workbench
	  • Launch Service Order Details
	  • Service Order Number
	  • Service Item
	  • Service Request
	  • Customer
	  • Account Name
	  • Summary
	  • Bill To
	  • Ship To
	  • Owner
	  • Contact
	  • Contact Phone
	  • Contact Email
	  • Type
	  • Severity
	  • Urgency
	  • SR Status
	  • Item

Region	Components
	- Item Description - Creation Date - Created By - Channel - Account Number - Customer Type - Ship To City - Ship To Country - Customer Number - Date Closed - Column Set: Logistics - Launch Technician Portal - Launch Workbench - Launch Service Order Details - Service Order Number - Service Item - RMA Number - RMA Item - Receive Into Warehouse - Receive Into Subinventory - Return from Location

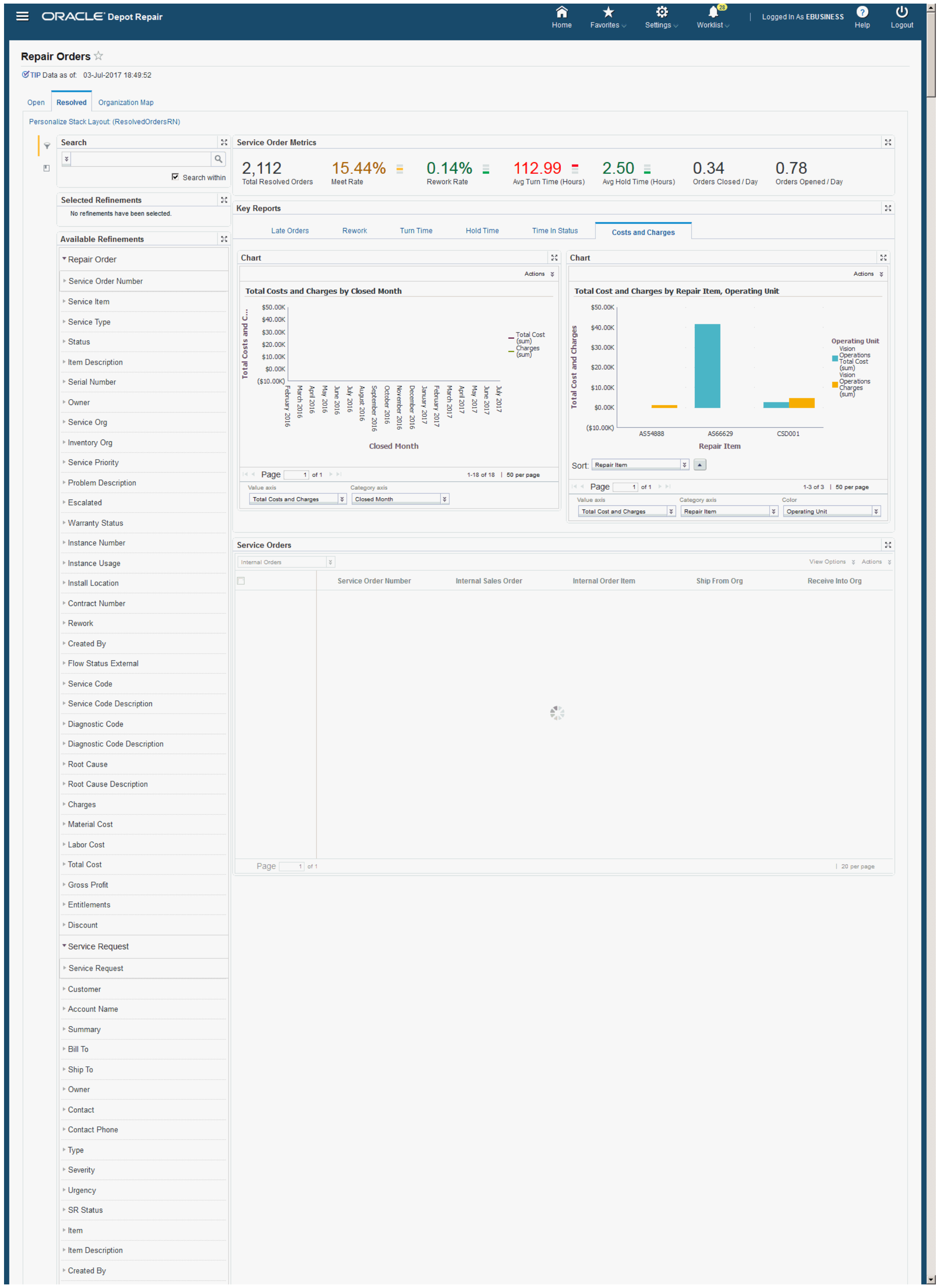
Region	Components
	- Return Reason - Date Received - Sales Order - Ship Item - Ship From Org - Ship To Location - Planned Arrival Date - Date Shipped - RMA Creation Date - Column Set: Internal Orders - Launch Technician Portal - Launch Workbench - Launch Service Order Details - Service Order Number - Internal Sales Order - Internal Order Item - Ship From Org - Receive Into Org Table View Options include: - Hide/Show Columns - Sort

Region	Components
	• Reset table to default Table Actions include: • Print • Export • Update – select multiple rows in the results table and click Update to open the Mass Update page. The Mass Update page shows the selected service orders. **Note:** You can update the selected records; however, data already in Endeca will not be impacted by this.
Notifications	This displays notifications in a tabular format.

Resolved Tab

The Resolved tab in the Service Orders page displays information about resolved orders and displays information and data graphically and in tabular format. The page consists of the following regions and components:

The Resolved tab page contains filtering components that you can use to search, navigate and filter the data displayed in other components:



Region	Components
Tip	Displays the date on which the data was last refreshed.

Region	Components
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Service Order Number • Service Item • Service Type • Status • Item Description • Serial Number • Owner • Service Organization • Inventory Organization • Install Location • Contract Number • Lot Number

Region	Components
	• Customer • Account Name • Summary
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Service Order Metrics	• Total Resolved Orders • Meet Rate • Rework Rate • Average Turn Time (Days) • Average Hold Time (Hours) • Orders Closed/Day • Orders Opened/Day

Region	Components

Key Reports	• Late Orders
	  • Late Service Orders - Number of Late Repair Orders By Owner
	  • Late Service Orders - Number of Late Repair Orders By Repair Item
	• Rework
	  • Rework Orders - Number of Rework Orders by Owner
	  • Rework Orders - Number of Rework Orders by Item
	• Turn Time
	  • Turn Time - Average Turn Time (Minutes) by Owner
	  • Turn Time - Average Turn Time (Minutes) by Repair Item.
	• Hold Time
	  • Hold Time - Average Hold Time by Owner
	  • Hold Time - Average Hold Time by Repair Item
	• Time in Status
	  • Time in Status - Average Time in Status (Minutes) by Status
	• Costs and Charges
	  • Total Costs and Charges by Closed Month, Closed Year, and Closed Day
	  • Total Cost and Charges by Service

Region	Components
	Item, Operating Unit, Return type, Account Name, Inventory Organization, Service Organization, and Owner

Region	Components

Service Orders	• Column Set: Service Order
	  • Launch Technician Portal
	  • Launch Workbench
	  • Launch Service Order Details
	  • Service Order Number
	  • Service Item
	  • Service Type
	  • Status
	  • Quantity
	  • Creation Date
	  • Resolve by Date
	  • Promise Date
	  • Date Closed
	  • Item Description
	  • Serial Number
	  • Owner
	  • Service Org
	  • Inventory Org
	  • Service Priority
	  • Problem Description
	  • Escalated

Region	Components
	• Warranty Status • Instance Number • External Reference • Instance Usage • Install Location • Contract Number • Lot Number • Item Revision • Aging • Rework • Created By • Flow Status External • Quantity Received • Quantity Shipped • Quantity in WIP • Late • Service Code • Service Code Description • Diagnostic Code • Diagnostic Code Description • Root Cause

Region	Components
	- Root Cause Description - Turn Time - Resolution Time - Charges - Material Cost - Labor Cost - Total Cost - Gross Profit - Entitlements - Discount - Column Set: Service Request - Launch Technician Portal - Launch Workbench - Launch Service Order Details - Service Order Number - Service Request - Customer - Account Name - Summary - Bill To - Ship To

Region	Components
	• Owner • Contact • Contact Phone • Contact Email • Type • Severity • Urgency • SR Status • Item • Item Description • Creation Date • Created By • Channel • Account Number • Customer Type • Ship To City • Ship To Country • Customer Number • Date Closed • Column Set: Logistics • Launch Technician Portal

Region	Components
	- Launch Workbench - Launch Service Order Details - Service Order Number - RMA Number - RMA Item - Receive Into Warehouse - Receive Into Subinventory - Return from Location - Return Reason - Date Received - Sales Order - Ship Item - Ship From Org - Ship To Location - Planned Arrival Date - Date Shipped - RMA Creation Date - Column Set: Estimate - Launch Technician Portal - Launch Workbench - Launch Service Order Details

Region	Components
	- Service Order Number - Approval Status - Estimate Status - Column Set: Repair Actuals - Launch Technician Portal - Launch Workbench - Launch Service Order Details - Service Order Number - Bill To Location - Bill To Party - Bill To Account - Bill To Account Name - Column Set: Jobs - Launch Technician Portal - Launch Workbench - Launch Service Order Details - Service Order Number - Jobs - Item - Job Status - Accounting Class

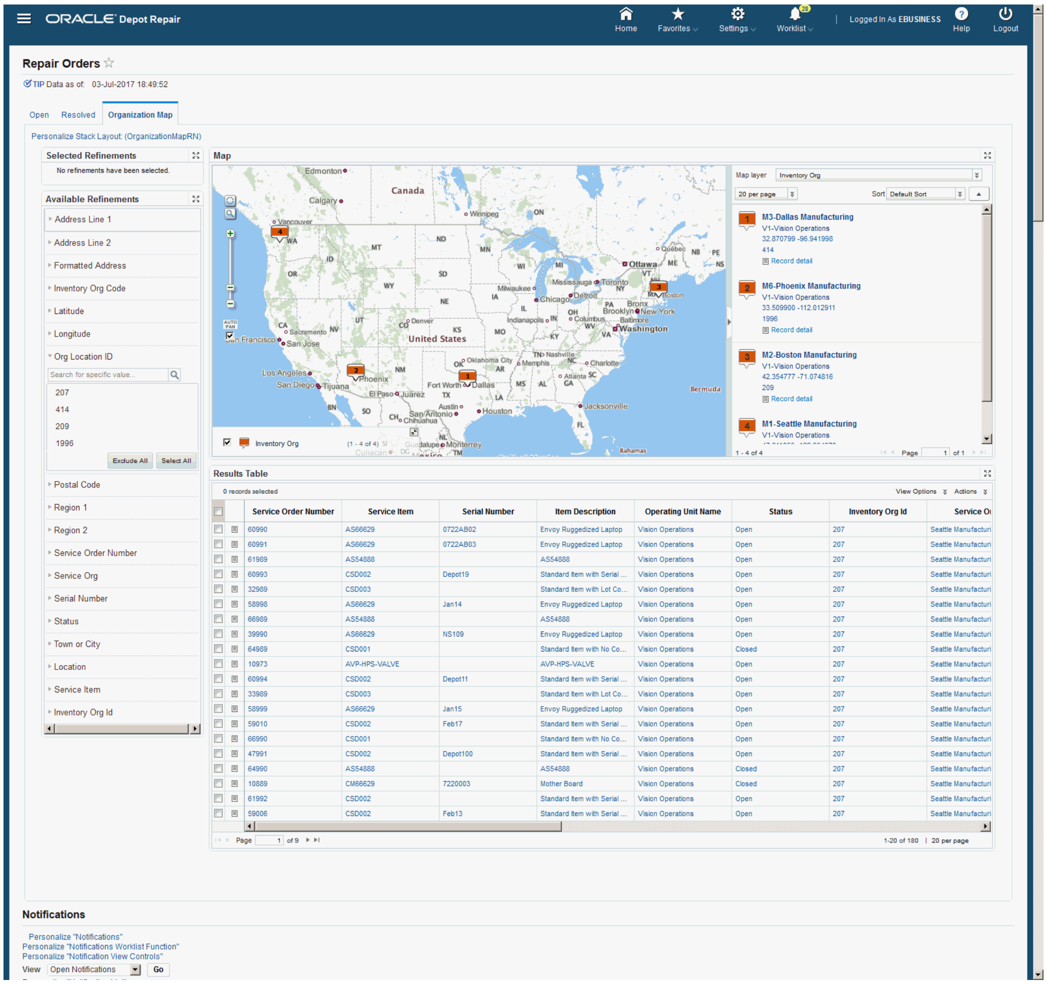
Region	Components
	- Creation Date - Operation Code - Department - Material Details - Requisition - Requisition Type - Requisition Status • Column Set: RO Tasks - Launch Technician Portal - Launch Workbench - Launch Service Order Details - Service Order Number - Name - Task Status - Priority - Type - Owner Type - Owner - Assignee Type - Assignee - Planned Start Date

Region	Components
	- Actual Start Date - Actual End Date - Scheduled Start Date - Scheduled End Date • Column Set: SR Tasks - Launch Technician Portal - Launch Workbench - Launch Service Order Details - Service Order Number - Name - Type - Priority - Task Status - Owner Type - Owner - Assignee Type - Assignee - Planned Start Date - Actual Start Date - Actual End Date - Scheduled Start Date

Region	Components
	- Scheduled End Date • Column Set: Internal Orders - Launch Technician Portal - Launch Workbench - Launch Service Order Details - Service Order Number - Internal Sales Order - Internal Order Item - Ship From Org - Receive Into Org • Hide/Show Columns • Sort • Reset table to default Table Actions include: • Print • Export • Compare - select multiple rows in the results table and click Compare to compare the selected rows.
Record Details	Displays details of the selected Service Order Number.
Notifications	This displays notifications in a tabular format.

Organization Map Tab

The Organization Map tab in the Repair Orders page displays information about the location of each repair inventory organization on the map. The page consists of the following regions and components:



Region	Components
Tip	Displays the date on which the data was last refreshed.

Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Address Line 1 • Address Line 2 • Formatted Address • Inventory Org Address • Latitude • Longitude • Org Location ID • Postal Code • Region 1 • Region 2 • Service Order Number • Service Org • Serial Number • Status • Town or City • Location • Service Item • Inventory Org ID

Region	Components
Map	This widget displays the location of each repair inventory organization on the map. Click the location of any of the inventory organizations on the map to filter and display data about service orders assigned to the selected organization's location.

Region	Components
Results Table	The details that display on the Results Table are: • Service Order Number • Service Item • Serial Number • Item Description • Operating Unit Name • Status • Inventory Org ID • Service Org • Town or City • Country • Address Line 1 • Address Line 2 • Address Line 3 • Region 1 • Region 2 • Region 3 • Hide/Show Columns • Sort • Reset table to default Table Actions include:

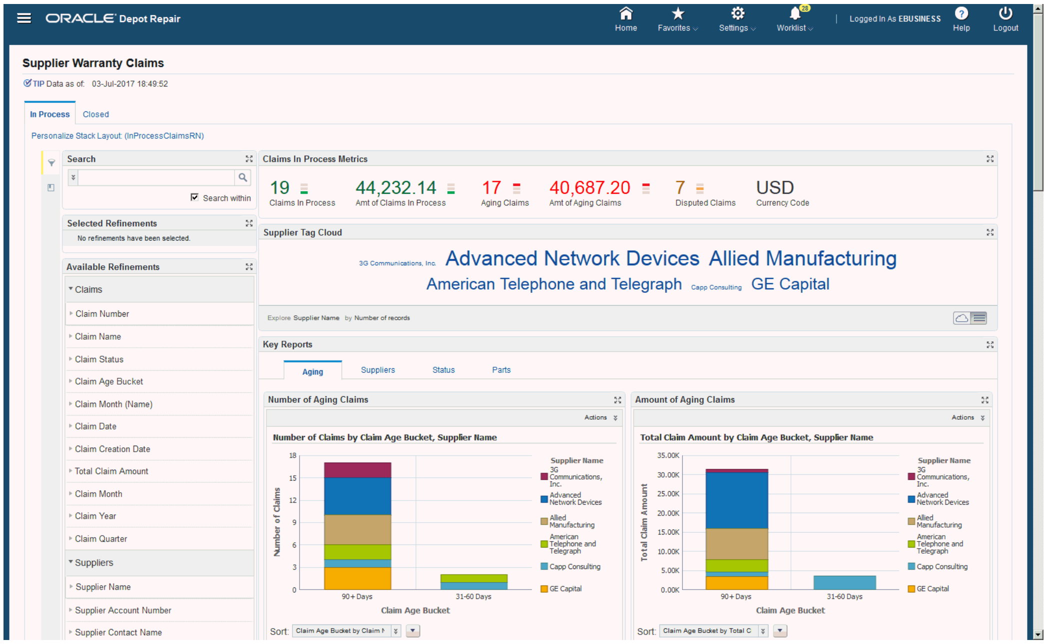
Region	Components
	• Print • Export • Compare

Supplier Warranty Claims Dashboard Page

Claims managers and claims administrators can access the Supplier Warranty Claims Dashboard page to view open and resolved orders to gather business intelligence and analysis of historical data. The Supplier Warranty Claims Dashboard page consists of two tabs - In Process and Closed.

In Process Tab

The In Process tab in the Supplier Warranty Claims Dashboard page displays information about in process claims and displays information and data graphically and in tabular format.



The page consists of the following regions and components:

Region	Components
Tip	Displays the date on which the data was last refreshed.
Search • Search Within	The Search component allows you to submit keyword searches and provides type-ahead suggestions displaying attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Claims In Process Metrics	• Claims in Process • Amt of Claims in Process • Aging Claims • Amt of Aging Claims • Disputed Claims • Currency Code

Key Reports	• Aging
	  • Number of Aging Claims
	  • Amount of Aging Claims
	• Suppliers
	  • Number of Claims By Supplier
	  • Total Claim Amount By Supplier
	• Status
	  • Number of Claims By Claim Status
	  • Total Claim Amount By Claim Status
	• Parts
	  • Number of Claim Lines
	  • Total Claim Line Amount

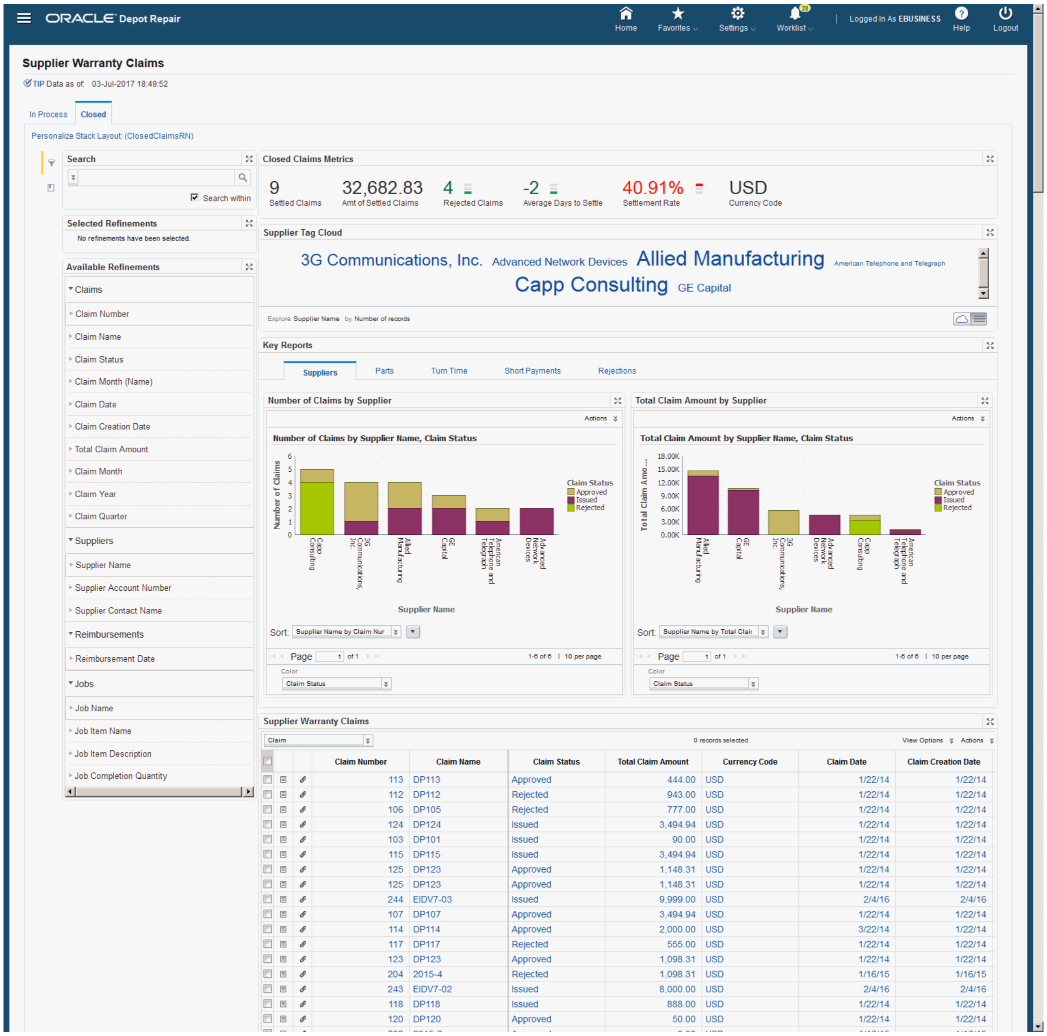
Region	Components

Supplier Warranty Claims	• Column Set: Claim
	  • Claim Number
	  • Claim Name
	  • View Claim
	  • Status
	  • Total Claim Amount
	  • Currency Code
	  • Claim Date
	  • Creation Date
	  • Month
	  • Year
	  • Quarter
	  • Claim Notes
	• Column Set: Supplier
	  • Claim Number
	  • Claim Name
	  • View Claim
	  • Supplier Name
	  • Account Number
	  • Contact Name
	  • Area Code

Region	Components
	• Phone Number • Email • Bill To Address • Ship To Address
Supplier Warranty Claim Details	Displays the details of the selected Claim Number
Supplier Tag Cloud	This tag cloud displays the distribution of all suppliers with claims in the result set.
Notifications	This displays notifications in a tabular format.

Closed Tab

The Closed tab in the Supplier Warranty Claims Dashboard page displays information about closed claims and displays information and data graphically and in tabular format.


ORACLE Depot Repair
Home
Favorites
Settings
Worklist
Logged In As EBUSINESS
Help
Logout
Supplier Warranty Claims
TIP Data as of: 03-Jul-2017 18:49:52
In Process
Closed
Personalize Stack Layout: (ClosedClaimsRN)
Search
Search within
Selected Refinements
No refinements have been selected.
Available Refinements
Claims
Claim Number
Claim Name
Claim Status
Claim Month (Name)
Claim Date
Claim Creation Date
Total Claim Amount
Claim Month
Claim Year
Claim Quarter
Suppliers
Supplier Name
Supplier Account Number
Supplier Contact Name
Reimbursements
Reimbursement Date
Jobs
Job Name
Job Item Name
Job Item Description
Job Completion Quantity
Closed Claims Metrics
9
Settled Claims
32,682.83
Amt of Settled Claims
4
Rejected Claims
-2
Average Days to Settle
40.91%
Settlement Rate
USD
Currency Code
Supplier Tag Cloud
3G Communications, Inc.
Advanced Network Devices
Allied Manufacturing
American Telephone and Telegraph
Capp Consulting
GE Capital
Key Reports
Suppliers
Parts
Turn Time
Short Payments
Rejections
Number of Claims by Supplier
Total Claim Amount by Supplier
Number of Claims by Supplier Name, Claim Status
Total Claim Amount by Supplier Name, Claim Status
Claim Status
Approved
Issued
Rejected
Supplier Name
Supplier Warranty Claims
Claim Number
Claim Name
Claim Status
Total Claim Amount
Currency Code
Claim Date
Claim Creation Date

Region	Component
Search • Search Within	The Search component allows you to submit keyword searches and provides type-ahead suggestions displaying attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Closed Claims Metrics	• # of Settled Claims • Amt of Settled Claims • # of Rejected Claims • Amt of Rejected Claims • Amt Short Paid • Average Days to Settle • Settlement Rate • Currency Code

Region	Component

Key Reports	• Suppliers
	  • Number of Claims By Supplier
	  • Total Claim Amount By Supplier
	• Parts
	  • Number of Claim Lines
	  • Total Claim Line Amount
	• Turn Time
	  • Average Turn Time By Supplier
	• Short Payments
	  • Number of Short Payments By Supplier
	  • Total Amount of Short Payments By Supplier
	• Rejections
	  • Number of Rejected Claims By Supplier
	  • Total Amount of Rejected Claims By Supplier

Region	Component

Supplier Warranty Claims	• Column Set: Claim
	  • Claim Number
	  • Claim Name
	  • View Claim
	  • Status
	  • Total Claim Amount
	  • Currency Code
	  • Claim Date
	  • Creation Date
	  • Month
	  • Year
	  • Quarter
	  • Claim Notes
	• Column Set: Reimbursement
	  • Claim Number
	  • Claim Name
	  • View Claim
	  • Reimbursement Type
	  • Reimbursement Amount
	  • Currency Code
	  • Reimbursement Date

Region	Component
	- Reimbursement Notes - Reference Document • Column Set: Supplier - Claim Number - Claim Name - View Claim - Supplier Name - Account Number - Contact Name - Area Code - Phone Number - Email - Bill To Address - Ship To Address
Supplier Warranty Claim Details	Displays the details of the selected Claim Number
Supplier Tag Cloud	This tag cloud displays the distribution of all suppliers with claims in the result set.
Notifications	This displays notifications in a tabular format.

Oracle Depot Repair Information Discovery Plus Product Configuration

Overview

Complete the Oracle Depot Repair Information Discovery Plus product configuration after the installation and common configurations are completed as described in the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1).

Set up Oracle Depot Repair Information Discovery Plus Integration

1. Add the Depot: Endeca Access Role to any predefined Oracle Depot Repair responsibility or to any custom Depot Repair responsibility. Update the Grant CSD_ENDECA_ACCESS_GRANT and the Permission Set CSD_ENDECA_ACCESS_PS.

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: Grants in Oracle Depot Repair Information Discovery Plus, page 9-48

   See: Permission Sets in Oracle Depot Repair Information Discovery Plus, page 9-48

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: Appendix C: Adding Roles to Responsibilities and Setting Security Context in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1)

2. Run the Full Graph to complete the initial data load for Oracle Depot Repair Information Discovery.

   See: *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1)

3. Run the Full Load Graph.

   See: Running the Full Load Graph, page 9-46

4. Set up the Scheduler.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 9-46

Running the Full Load Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Depot Repair Full Load Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select csd from the Sandbox list.
13. Select graph/FullLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler for Incremental Refresh

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), initial data load for Oracle Depot Repair Information Discovery Plus is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the volume of information requiring update.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Depot Repair Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select csd from the Sandbox list.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Technical Integration Components

Roles in Oracle Depot Repair Information Discovery Plus

- Role Name: Depot: Endeca Access Role
- Code: CSD_ENDECA_ACCESS_ROLE

Grants in Oracle Depot Repair Information Discovery Plus

- Grant Name: Depot: Endeca Access Role
- Grant Code: CSD_ENDECA_ACCESS_GRANT
- Grantee Type: Group of Users
- Grantee: Depot: Endeca Access Role
- Responsibility - select a predefined responsibility or a custom responsibility of your choice
- Permission Set Code: CSD_ENDECA_ACCESS_PS
- Permission Set Name- Depot: Endeca Access Permission Set

Permission Sets in Oracle Depot Repair Information Discovery Plus

- Permission Set Name- Depot: Endeca Access Permission Set
- Permission Set Code - CSD_ENDECA_ACCESS_PS
- Permissions Included in the Set: Depot: Repair Orders Endeca Page (CSD_ENDECA_REPAIRS_DASHBOARD_PG) and Depot: Supplier Warranty Endeca Dashboard PG (CSD_ENDECA_SUPWAR_DASHBOARD_PG)

Views and Joins to Load Oracle Depot Repair Information Discovery Plus

The following views are used by the ETL layer in Oracle Endeca to load and display Oracle Depot Repair Information Discovery Plus data to the Oracle Endeca data store:

- CSD_EID_SW_CLAIM_LINES_V - View to load Supplier Warranty Claims information.

- CSD_EID_REPAIRS_V - View to load Repair Orders information.
- CSD_EID_REPAIRS_INCR_V - View to load data from incremental refresh.
- CSD_EID_INV_ORG_MAP_V - View to load map data.

Menus and Functions in Oracle Depot Repair Information Discovery Plus

The following functions are available for the Depot Repair Depot Menu (CSD_DEPOT_MENU) in Oracle Depot Repair Information Discovery Plus:

Function Code	User Function Name	Function Type	Web HTML Call
CSD_ENDECA_SUPWAR_DASHBOARD_PG	Supplier Warranty Claims Dashboard	JSP	OA.jsp?page=/oracle/apps/csd/endeca/supwar/webui/EndecaSupwarrantyPG
CSD_ENDECA_REPAIRS_DASHBOARD_PG	Repair Orders Dashboard	JSP	OA.jsp?page=/oracle/apps/csd/endeca/ro/webui/EndecaRepairDashboardPG
CSD_ENDECA_INV_ORG_MAP	Inventory Organization Map View	JSP	GWY.jsp?targetAppType=Endeca&targetpage=web/csd-ro/csd_endeca_inv_org_map

The following functions are available for the Depot Repair Supplier Warranty Menu (CSD_SUPPLIER_WARRANTY_SUBMENU) in Oracle Depot Repair Information Discovery Plus:

Function Code	User Function Name	Function Type	Web HTML Call
CSD_ENDECA_SUPWAR_DASHBOARD_PG	Supplier Warranty Claims Dashboard	JSP	OA.jsp?page=/oracle/apps/csd/endeca/supwar/webui/EndecaSupwarrantyPG

10

Oracle Discrete Manufacturing Information Discovery Plus

This chapter covers the following topics:

- Overview
- Discrete Work Order Search User Interface
- Oracle Project Manufacturing - Overview Page
- Oracle Project Manufacturing - Work Orders Page
- Oracle Project Manufacturing - Procurement Page
- Oracle Project Manufacturing - Cost Activities Page
- Oracle Projects Manufacturing - Inventory Page
- Oracle Project Manufacturing - Sales Orders Page
- Setting Up Oracle Discrete Manufacturing Information Discovery Plus
- Setup and Configuration Steps
- Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Discrete Manufacturing Information Discovery Plus
- Scheduling Setup for Full Endeca Upload or Refresh
- ETL Parameters for Oracle Discrete Manufacturing Information Discovery Plus
- Views and Joins for Oracle Discrete Manufacturing Information Discovery Plus
- Concurrent Processes for Oracle Discrete Manufacturing Information Discovery Plus
- Menus for Oracle Discrete Manufacturing Information Discovery Plus
- Overview
- Setting Up Oracle Project Manufacturing
- Running the Full Load Graph

- Setting Up the Scheduler to Load Incremental Graphs
- Views and Joins in Oracle Project Manufacturing

Overview

Oracle Discrete Manufacturing Information Discovery Plus enables you to search and view dashboard metrics related to job status, job delays, component and resource shortage, quantity of scraps, and rejects. You can use the Oracle Information Discovery Discrete Work Order Search page to view and analyze the data using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables. Oracle Discrete Manufacturing Information Discovery Plus Work Order Search provides:

- Proactive response to work order issues
- Rapid diagnosis and resolution to current issues affecting schedules from key insights
- Accurate and fact based decisions for shopfloor
- Improved yield, cost, and cycle time management

This chapter provides product-specific details required to integrate Oracle E-Business Suite Information Discovery with Oracle E-Business Suite Release 12.2 V8 for the Oracle Discrete Manufacturing application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

Oracle Projects Manufacturing

You can use Oracle Project Manufacturing to get a 360 degree view of Project Supplier Chain activities. It allows you to analyze Oracle Projects and Oracle Project Manufacturing data from different dimensions.

As a Project Manager or a Supervisor, you can search for a project using project number, project name, or project description and other project attributes. You can then access the details for a project from the list of projects that matched your search criteria. Based on the Project search result, you can view all the project information and drill down to review additional details for the project including budgets, expenditures, project status, RFQ, quotation, requisitions, purchase orders, blanket POs, manufacturing plans, WIP jobs, onhand balances, sales orders, onhand values, and line schedules. You can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using Oracle Project Manufacturing pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Project Manufacturing for Oracle the Endeca application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

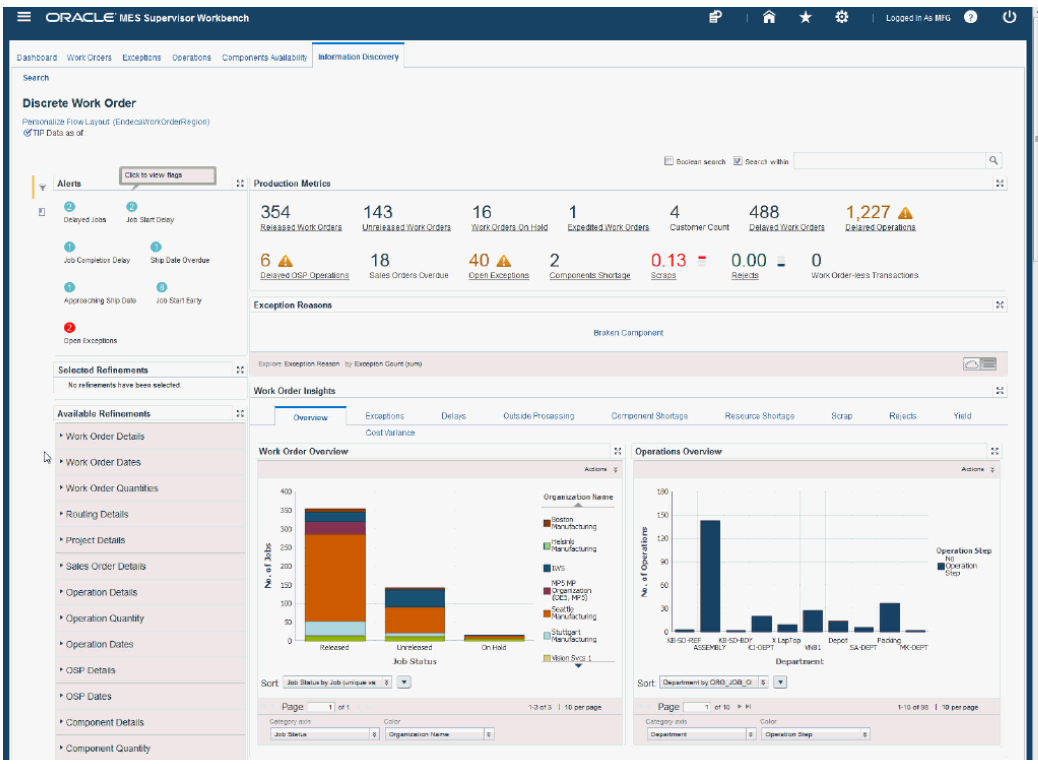
Oracle Discrete Manufacturing Information Discovery Plus User Interface

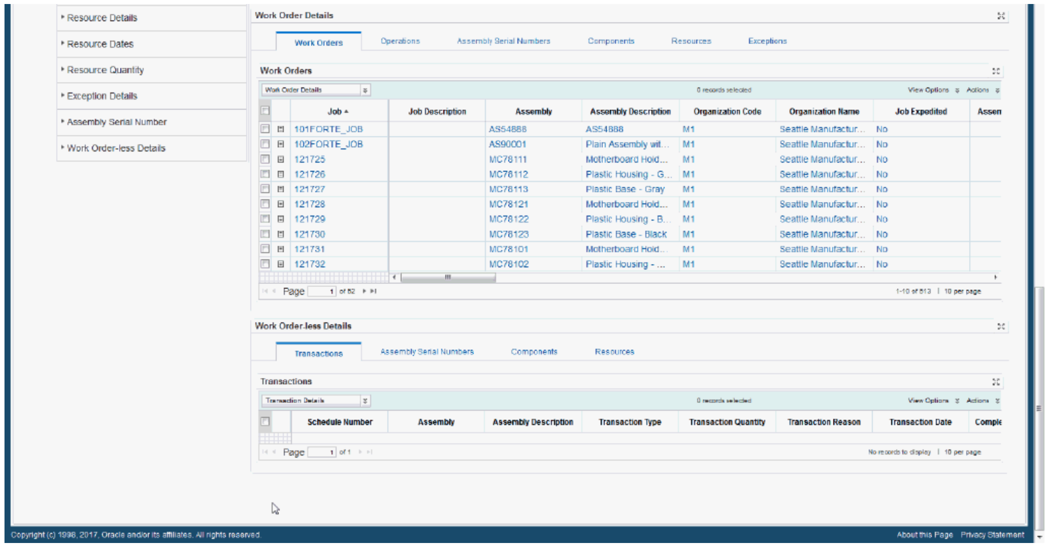
Discrete Work Order Search User Interface

Use the Discrete Work Order Search page to search and view dashboard metrics related to job status, job delays, component and resource shortage, quantity of scraps, and rejects. The page displays information and data graphically and in tabular format. The following graphic displays a partial view of the Discrete Work Order Search page.

From the MES Supervisor responsibility, navigate to the Discrete Work Order Search page:

(N) MES Supervisor > Discrete Work Order Information Discovery





Within the Discrete Work Order Search page, you can search and filter work order information. You can analyze the data and review work order and production metrics, charts, graphs, and tables. The following describes the Discrete Work Order Search page regions and components:

Region	Components
Alerts	Alerts are provided that guide users to critical actions that need to be taken to address time sensitive issues.
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.

Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Work Order Details • Work Order Quantities • Work Order Dates • Discrete Job (descriptive flexfield attributes) • Sales Order Details • Bill Details • Routing Details • Project Details • Operation Details • Operation Quantity • Operation Dates • Operation Information (descriptive flexfield attributes) • OSP Details • OSP Quantity • OSP Dates • Component Details • Component Quantity • Component Date

Region	Components
	• Resource Details • Resource Quantity • Resource Dates • Exception Details • Exception Dates • Assembly Serial Number • Serial Numbers (descriptive flexfield attributes) • Serial Attributes (descriptive flexfield attributes)

Region	Components
Production Metrics (summarization bar) **Note:** The Metrics Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning - Grey: Normal - Green: Good	• Released Work Orders • Unreleased Work Orders • Completed Work Orders • Work Orders on Hold • Cancelled Work Orders • Expedited Work Orders • Customer Count • Delayed Work Orders • Delayed Operations • Delayed OSP Operations • Sales Orders Overdue • Open Exceptions • Components Shortage • Resources Shortage • Scraps (percentage) • Rejects (percentage) • Work Order-less Transactions
Exception Reasons (tag cloud)	Top Ten Exception Reasons Tag Cloud Component **Note:** The Exception Reasons component displays the top ten exception reasons by frequency of occurrence.

Region	Components
Work Order Insights (tabbed container component) Overview (tab)	Work Order Overview (chart) - Sort Options - Job Status - Job Status by Job (unique values) - Dimensions (category axis) - Status - Assembly Base Model - Assembly - Customer - Department - Job Class - Job Early Start Days - Job Early Completion Days - Job Type - Project Name - Scheduled Start Date - Scheduled Completion Date - Scheduled Ship Date - Ship Date Approach Risk Days - Series Dimensions (color) (none) - Organization Name

Region	Components

	- Assembly Base Model
	- Job Expedited
	- Status
	
	Operations Overview (chart)
	- Sort Options
	  - Department
	  - Department by ORG_JOB_OP (unique values)
	- Dimensions (category axis)
	  - Department
	  - Assembly Base Model
	  - Department Description
	  - Operation Code
	  - Operation Step
	  - Resource
	  - Resource Description
	  - Scheduled Operation Start Date
	  - Scheduled Operation Completion Date
	  - Shopfloor Status
	- Series Dimensions (color)
	  - (none)
	  - Operation Step

Region	Components
	• Job Status • Operation Code • Operation Early Start Days • Operation Early Completion Days • Resource • Shopfloor Status

Region	Components

Work Order Insights (tabbed container component)
 	
Exceptions (tab)
	Exceptions Count by Exception Type (chart)
	• Sort Options
	  • Exception Type
	  • Exception Type by Exception ID (unique values)
	• Dimensions
	  • Exception Type
	  • Exception Reason
	• Series Dimensions (color)
	  • (none)
	  • Exception Status
	  • Assembly
	  • Customer
	  • Exception Reason
	  • Job Type
	  • Organization Name
	  • Project Name
	
	Impacted Jobs Details (chart)
	• Sort Options
	  • Assembly
	  • Assembly by Impacted Job (unique values)
	• Dimensions (category axis)

Region	Components
	- Assembly - Customer - Department - Job Type - Project Name - Series Dimensions (color) (none) - Exception Reason

Region	Components

Work Order Insights (tabbed component container)
 	
Delays (tab)
	Work Order Delays (chart)
	
	• Sort Options
	    • Organization Name
	    • Organization Name by Job (unique values)
	• Dimensions (category axis)
	    • Organization Name
	    • Assembly
	    • Customer
	    • Department
	    • Job Class
	    • Job Type
	    • Job Start Delay Days
	    • Job Completion Delay Days
	    • Operation Code
	    • Operation Start Delay Days
	    • Operation Completion Delay Days
	    • Project Name
	    • Ship Date Passed Days
	    • Status
	• Series Dimensions (color)
	    • (none)

Region	Components

	• Job Delays Days
	• Job Start Delay Days
	• Job Completion Delay Days
	• Operation Start Delay Days
	• Operation Completion Delay Days
	• Ship Date Passed Days
	
	Work Order Delay Details (chart)
	• Sort Options
	  • Assembly
	  • Assembly by Org Job Op (unique values)
	• Dimensions (category axis)
	  • Assembly
	  • Customer
	  • Department
	  • Job
	  • Job Class
	  • Job Type
	  • Job Start Delay Days
	  • Job Completion Delay Days
	  • Operation Start Delay Days
	  • Operation Completion Delay Days

Region	Components
	- Organization Name - Resource Description - Project Name - Status - Ship Date Passed Days • Series Dimensions (color) - (none) - Operation Delay Days - Job Start Delay Days - Job Completion Delay Days - Operation Start Delay Days - Operation Completion Delay Days - Ship Date Passed Days

Region	Components

Work Order Insights (tabbed component container)
 	
Outside Processing (tab)
	Outside Processing Suppliers (chart)
	• Sort Options
	  • OSP Supplier
	  • OSP Supplier by Org Job Op (unique values)
	• Series Dimensions (color)
	  • (none)
	  • Assembly
	  • Exception Reason
	  • Exception Status
	  • Exception Type
	  • Operation Delay Days
	  • Operation Start Delay Days
	  • Operation Completion Delay Days
	  • Scheduled Operation Start Date
	  • Scheduled Operation Completion Date
	
	Outside Processing Details (cross tab)
	• Column Sets
	  • Operation Details
	  • Purchase Order Details
	  • Operation Dates
	  • Operation Quantities

Region	Components

Work Order Insights (tabbed component container)
 	
Component Shortage (tab)
	Component Shortage (chart)
	• Sort Options
	  • Job
	  • Job by Component Shortage Quantity (sum)
	• Dimensions (category axis)
	  • Job
	  • Component
	  • Assembly
	  • Customer
	  • Job Type
	  • Organization Name
	  • Project Name
	
	Component Shortage Details (cross tab)
	• Column Sets
	  • Component Details
	  • Component Quantities

Region	Components
Work Order Insights (tabbed component container) Resource Shortage (tab)	Resource Shortage (chart) - Sort Options - Job - Job by Resource Shortage (sum) - Dimensions (category axis) - Job - Assembly - Customer - Job Type - Organization Name - Project Name - Resource Resource Shortage Details (cross tab) - Column Sets - Resource Details - Resource Quantities

Region	Components

Work Order Insights (tabbed component container)
 	
Scrap (tab)
	Scrap by Reason (chart)
	• Sort Options
	  • Scrap Reason
	  • Scrap Reason by Scrapped Quantity (sum)
	• Series Dimension (color)
	  • (none)
	  • Organization Name
	  • Assembly
	  • Job
	  • Job Class
	  • Job Type
	  • Project Name
	  • Sales Order
	
	Scrap Details (chart)
	• Sort Options
	  • Assembly
	  • Assembly by Scrapped Quantity (sum)
	• Series Dimension (color)
	  • (none)
	  • Organization Name
	  • Job

Region	Components
	• Job Class • Job Type • Project Name • Sales Order • Status

Region	Components

Work Order Insights (tabbed component container)
 	
Rejects (tab)
	Reject by Reason (chart)
	• Sort Options
	  • Reject Reason
	  • Reject Reason by Rejected Quantity (sum)
	• Series Dimensions (color)
	  • (none)
	  • Organization Name
	  • Assembly
	  • Job
	  • Job Class
	  • Job Type
	  • Project Name
	  • Sales Order
	
	Reject Details (chart)
	• Sort Options
	  • Assembly
	  • Assembly by Rejected Quantity (sum)
	• Series Dimensions (color)
	  • (none)
	  • Organization Name
	  • Job

Region	Components
	• Job Class • Job Type • Sales Order • Project Name

Work Order Insights (tabbed component container)
Yield (tab)
	Yield (chart)
	• Sort Options
	  • Job
	  • Job by Yield (average)
	• Dimensions (category axis)
	  • Job
	  • Assembly
	  • Customer
	Yield Details (cross tab)
	• Column Sets
	  • Work Order Details
	  • Work Order Quantities

Region	Components

Work Order Insights (tabbed component container)
 	
Cost Variance (tab)
	Cost Variance (chart)
	• Sort Options
	  • Job
	  • Job by TLTotalVariance (sum)
	• Dimensions (value axis)
	  • TL Variance Percent
	  • PL Variance Percent
	
	Cost Variance Details (cross tab)
	• Column Sets
	  • Work Order Details
	  • This Level Variance Details
	  • Previous Level Variance Details

Region	Components

Work Order Details (tabbed component container)
 	
Work Orders (tab)
	Work Orders (results table)
	• Column Sets
	  • Work Order Details
	  • Work Order Dates
	  • Work Order History
	  • Bill Details
	  • Routing Details
	  • Project Details
	  • Sales Order Details
	  • Job Note
	  • Actions
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Region	Components

Work Order Details (tabbed component container)
 	
Operations (tab)
	Operations (results table)
	• Column Sets
	  • Operation Details
	  • Operation Quantities
	  • Operation Dates
	  • Work Order Details
	  • Shopfloor Status
	  • Actions
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Work Order Details (tabbed component container)
 	
Assembly Serial Numbers (tab)
	Operations (results table)
	• Column Sets
	  • Assembly Details
	  • Assembly Serial Number Details
	  • Actions
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Region	Components

Work Order Details (tabbed component container)
 	
Components (tab)
	Components (results table)
	• Column Sets
	    • Component Details
	    • Component Quantities
	    • Supply Details
	    • Actions
	• View Options
	    • Hide / Show Columns
	    • Sort
	    • Reset table to default

Work Order Details(tabbed component container)
 	
Resources (tab)
	Resources (results table)
	• Column Sets
	    • Resource Details
	    • Resource Quantities
	    • Resource Scheduling
	    • Resource Costing
	    • OSP Details
	    • Actions
	• View Options
	    • Hide / Show Columns
	    • Sort
	    • Reset table to default

Region	Components

Work Order Details (tabbed component container)
 	
Exceptions (tab)
	Exceptions (results table)
	• Column Sets
	  • Exception Details
	  • Exception Notes
	  • Actions
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Work Order-Less Details (tabbed component container)
 	
Transactions (tab)
	Transactions (results table)
	• Column Sets
	  • Transaction Details
	  • Bill Details
	  • Project Details
	  • Sales Order Details
	  • Actions
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Region	Components

Work Order-Less Details (tabbed component container)
 	
Assembly Serial Numbers (tab)
	Assembly Serial Numbers (results table)
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Work Order-Less Details (tabbed component container)
 	
Components (tab)
	Components (results table)
	• Column Sets
	  • Component Details
	  • Actions
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

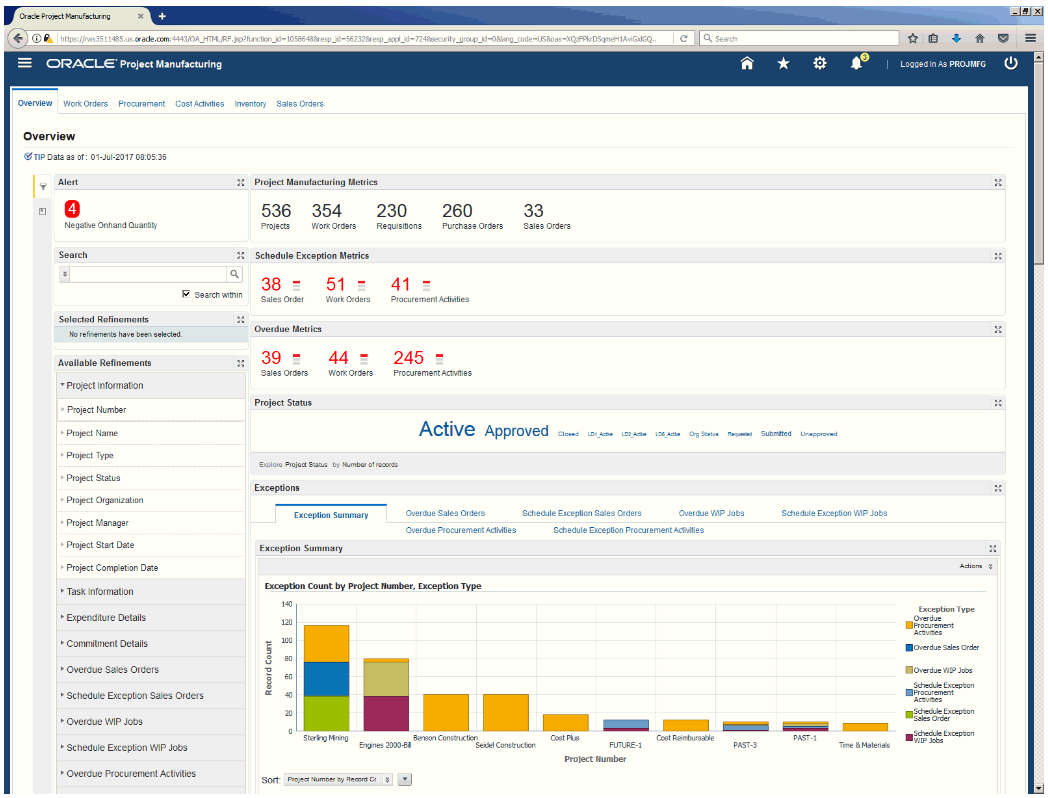
Work Order-Less Details (tabbed component container)
 	
Resources (tab)
	Resources (results table)
	• Column Sets
	  • Resource Details
	  • Resource Costing
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Oracle Project Manufacturing - Overview Page

Use the Overview page to see an overview of projects and tasks exception and overdue reports.

From the Manufacturing and Distribution Manager responsibility, navigate to the Overview page:

- (N) Projects > Inquiry > Inquiries > Project Manufacturing Discovery > Overview



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.

Region	Components
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Filters	Use filters to refine the displayed data to only include records that have attribute values within a specified range.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Region	Components
Project Manufacturing Metrics	Displays current statistics on selected: • Projects • Work Orders • Requisitions • Purchase Orders • Sales Orders
Schedule Exception Metrics	Displays current statistics on: • Sales Orders • Work Orders • Procurement Activities
Overdue Metrics	Displays current statistics on: • Sales Orders • Work Orders • Procurement Activities
Project Status	Displays the top 10 project statuses.

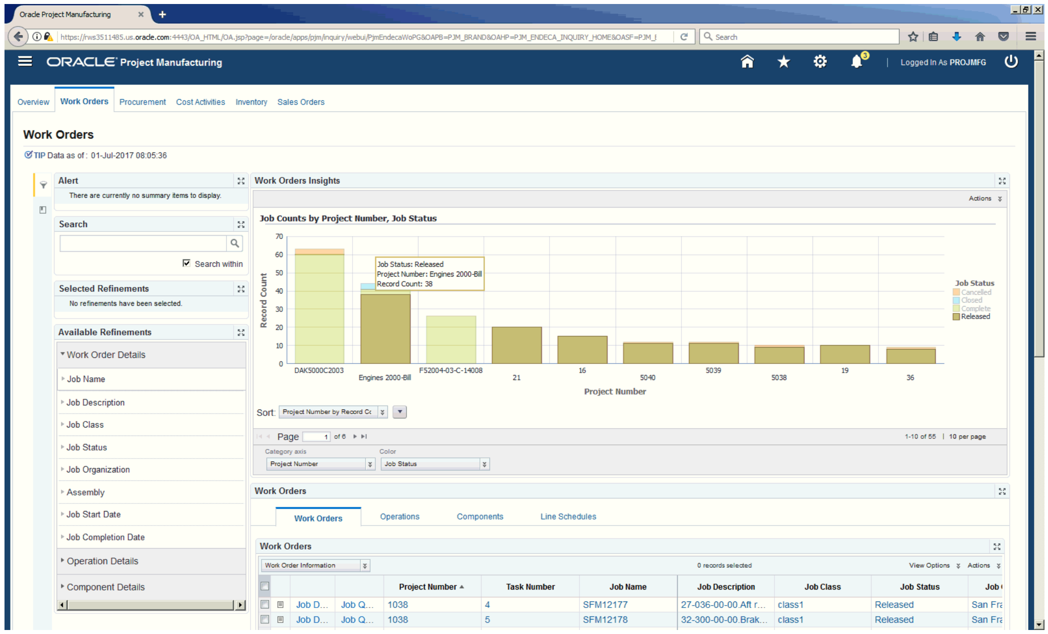
Region	Components
Exceptions	Displays the following tabs: • Exception Summary • Overdue Sales Orders • Schedule Exception Sales Order • Overdue WIP Jobs • Schedule Exception WIP Jobs • Overdue Procurement Activities • Schedule Exception Procurement Activities
Project Information, Expenditures and Commitments	Displays the following tabs: • Projects • Tasks • Expenditures • Committments

Oracle Project Manufacturing - Work Orders Page

Use the Work Orders page to see an overview of project related WIP jobs.

From the Manufacturing and Distribution Manager responsibility, navigate to the Work Orders page:

- (N) Projects > Inquiry > Inquiries > Project Manufacturing Discovery > Work Orders



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.

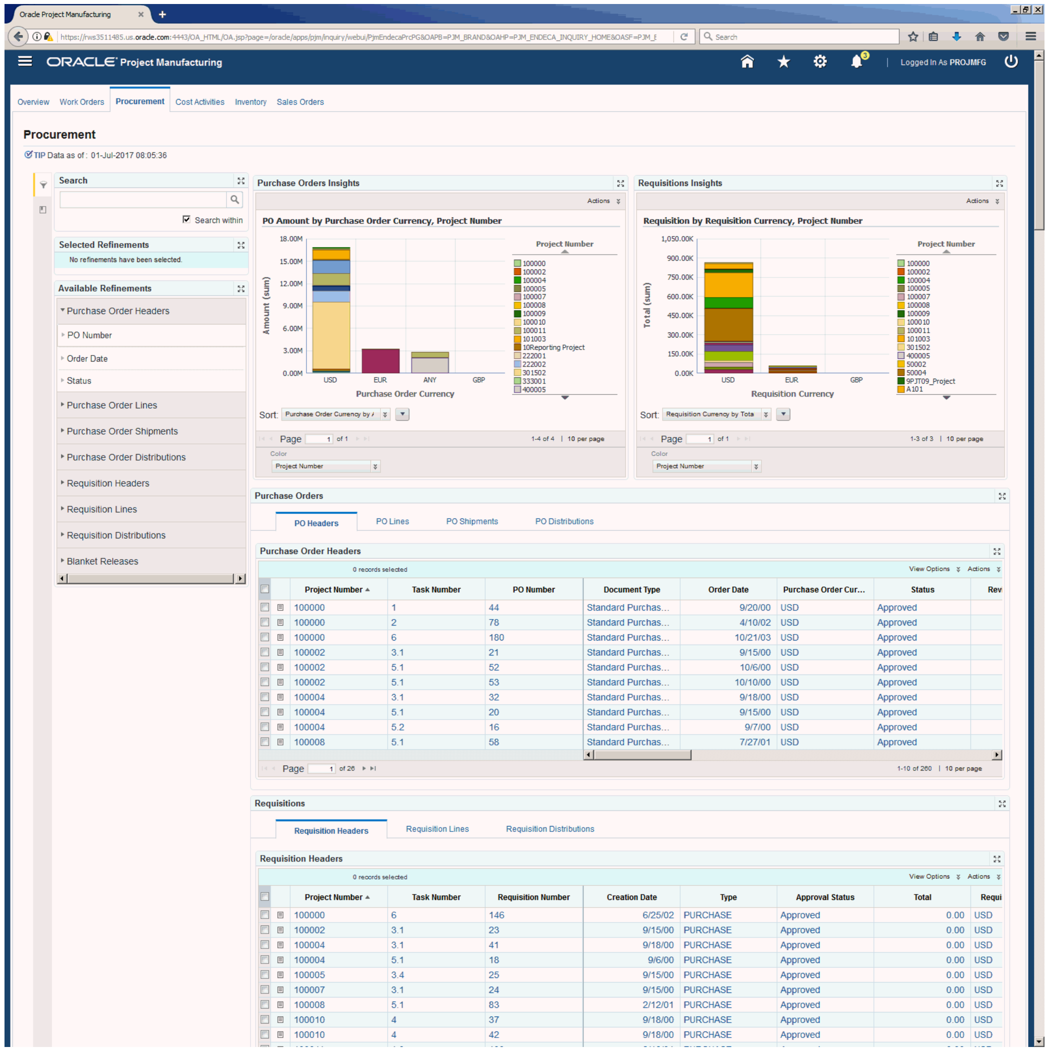
Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Work Orders Insights	Displays job counts by project number and job status in a graphical format.
Work Orders	Displays the following tabs: • Work Orders • Operations • Components • Line Schedules

Oracle Project Manufacturing - Procurement Page

Use the Procurement page to see an overview of project related purchase orders, requisitions, quotations, blanket releases and RFQs.

From the Manufacturing and Distribution Manager responsibility, navigate to the Procurement page:

- (N) Projects > Inquiry > Inquiries > Project Manufacturing Discovery > Procurement



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.

Region	Components
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Purchase Orders Insights	Displays PO Amount by currency and project number and job status in a graphical format.
Requisitions Insights	Displays requisition total by currency and project number.

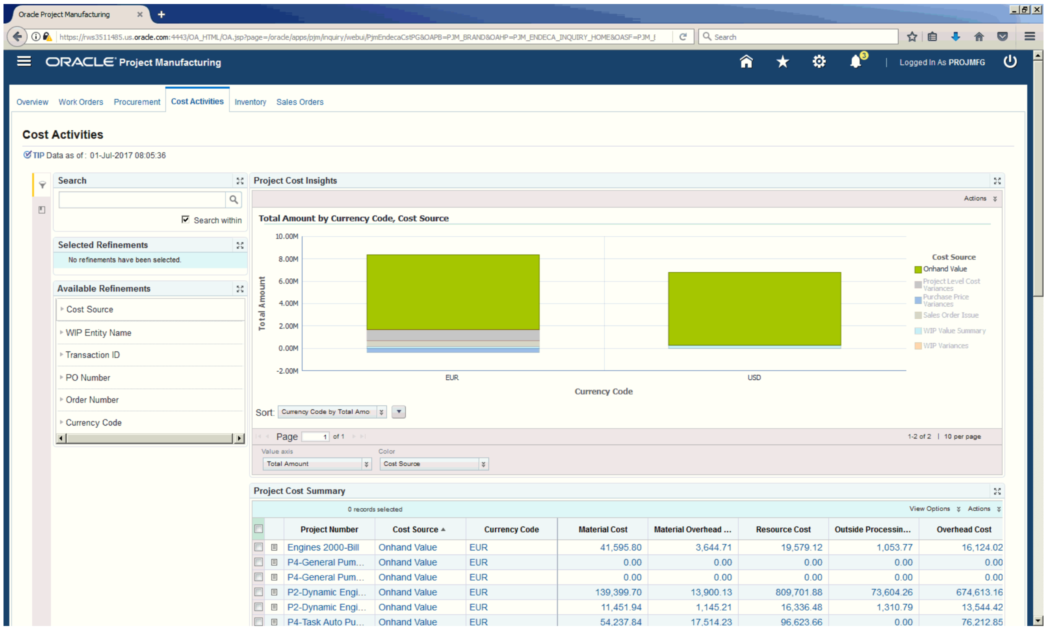
Region	Components
Purchase Orders	Displays the following tabs: • PO Headers • PO Lines • PO Shipments • PO Distributions
Requisitions	Displays the following tabs: • Requisition Headers • Requisition Lines • Requisition Distributions
Other Procurement Activities	Displays the following tabs: • Quotations • Blanket Releases • RFQs

Oracle Project Manufacturing - Cost Activities Page

Use the Cost Activities page to see an overview of project cost summary and details.

From the Manufacturing and Distribution Manager responsibility, navigate to the Cost Activities page:

- (N) Projects > Inquiry > Inquiries > Project Manufacturing Discovery > Cost Activities



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.

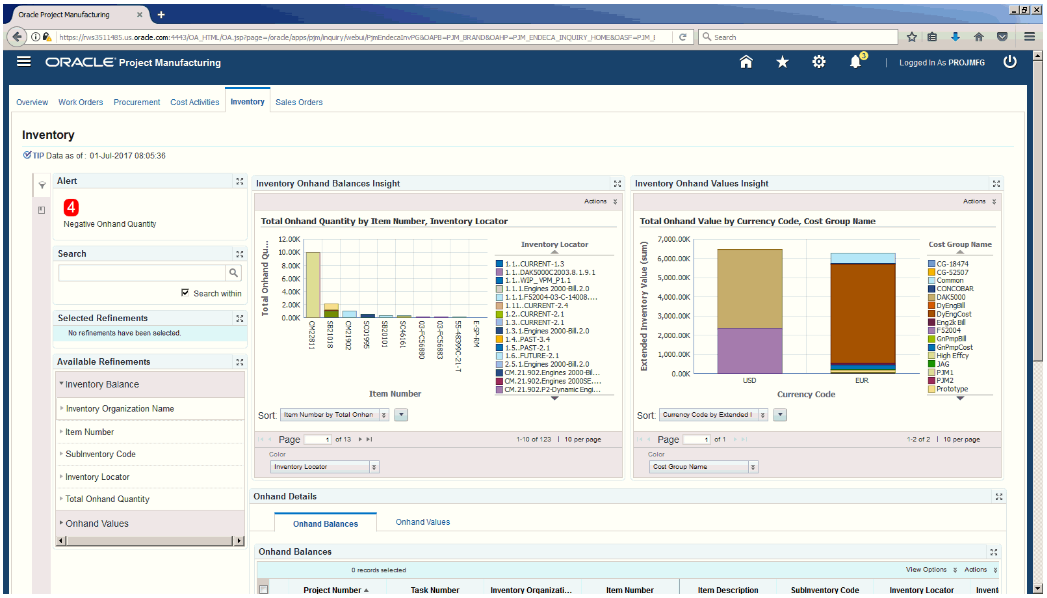
Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Project Cost Insights	Displays total amount by project number and cost source in a graphical format.
Project Cost Summary	Displays details such as Project Number, Cost Source, Currency Code, Material Cost, Material Overhead Cost, Resource Cost, Outside Processing Cost, Overhead Cost, Transaction Variances and Total Amount.
Cost Detail	Displays the following tabs: • WIP Value Summary • WIP Variances • Purchase Price Variances • Sales Order Issues • Project Level Cost Variances • Onhand Values

Oracle Projects Manufacturing - Inventory Page

Use the Inventory page to see an overview of on-hand balance and values.

From the Manufacturing and Distribution Manager responsibility, navigate to the Inventory page:

- (N) Projects > Inquiry > Inquiries > Project Manufacturing Discovery > Inventory



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.

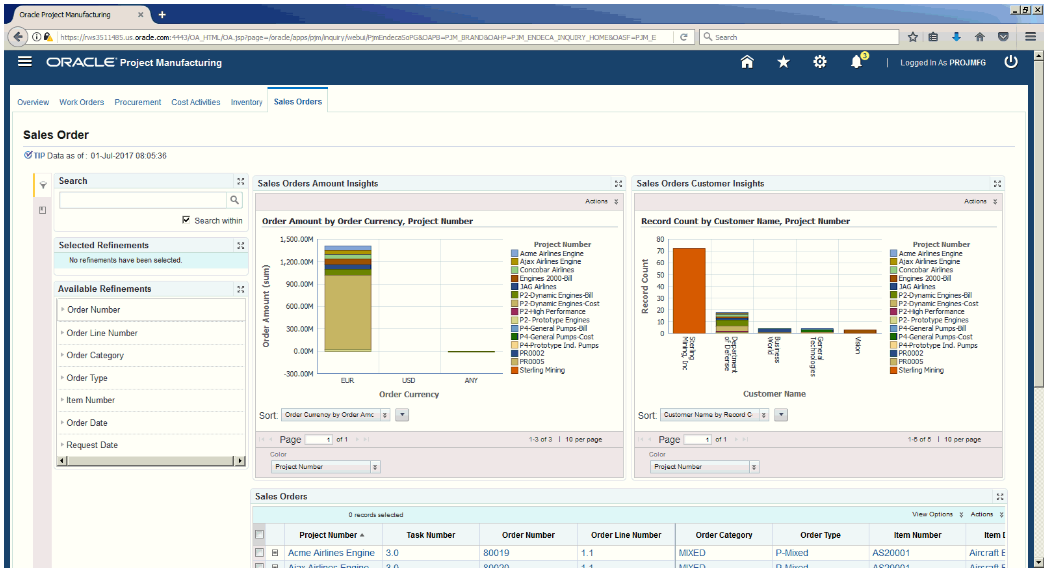
Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Inventory Onhand Balances Insights	Displays total onhand quantity by item number and locator in a graphical format.
Inventory Onhand Values Insights	Displays total onhand value by item number and cost group name in a graphical format.
Onhand Details	Displays the following tabs: • Onhand Balances • Onhand Values

Oracle Project Manufacturing - Sales Orders Page

Use the Sales Orders page to see an overview of project related sales orders.

From the Manufacturing and Distribution Manager responsibility, navigate to the Sales Orders page:

- (N) Projects > Inquiry > Inquiries > Project Manufacturing Discovery > Sales Orders



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Sales Orders Amounts Insights	Displays order amount by order currency and project number in a graphical format.
Sales Orders Customer Insights	Displays sales orders by customer number and project number in a graphical format.
Sales Orders	Displays details such as Project Name, Task Number, Order Number, Order Line Number, Customer PO Number, Order Category, Order Type, Item Number, Item Description, Unit Number, Freight Terms, Payment Terms, Customer Number, Customer Name, Order Date, Request Date, Cancelled, Ship-to-Location, Ship Method, Ship Priority, Allow Partial Ship, Bill-to-Location, Order Amount, Order Currency, and Tax Exempt Flag.

Oracle Discrete Manufacturing Information Discovery Plus Product Configuration

Setting Up Oracle Discrete Manufacturing Information Discovery Plus

This document provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 for the Oracle Discrete Manufacturing application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

Setup and Configuration Steps

To set up Oracle Discrete Manufacturing Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 10-46 by assigning UMX roles and updating access grants.
2. Load Work Order data to the Endeca Data Domain, page 10-48 by running graphs provided by the Oracle Discrete Work Order application.
3. Run Concurrent Processes, page 10-51 for Oracle Discrete Work Order.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Discrete Manufacturing Information Discovery Plus

As part of the Oracle E-Business Suite-EID integration for the Oracle Discrete Work Order application, the following UMX Role is provided:

UMX Role	Internal Code Name
WIP Endeca Discrete Work Order Discoverer	UMX|WIP_ENDECA_SEARCH

You must add the new UMX role 'WIP Endeca Discrete Work Order Discoverer' (Internal Code Name: UMX|WIP_ENDECA_SEARCH) to enable Endeca menu items for the responsibility, or any other custom responsibility which is using the same menu. When this UMX role is assigned to the responsibility, the menu items appear.

The page name on the Endeca search interface must be the same as the function name. In order to access the Endeca pages for Discrete Work Order, either of the following approaches must be followed, depending on your requirements:

- If access is required to be granted to an individual user:
  - Assign the Role 'WIP Endeca Discrete Work Order Discoverer' to the user

- If access is required to be given to a set of users with common responsibilities:
  - Assign the Role 'WIP Endeca Discrete Work Order Discoverer' to the responsibility

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Scheduling Setup for Full Endeca Upload or Refresh

Once the full graph is run in accordance with *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes and the initial data load for Discrete Work Order Search is complete.

Daily full refresh is required to reflect and synchronize any data deletions against existing Work Orders in EBS systems, or to periodically remove Work Orders with ' Closed' status from the Endeca data domain. Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. Out-of-the box ETL filters closed work orders for data ingest into the Endeca data domain.

Customers can choose an appropriate time of day to run daily full refresh. This can be daily or nightly when there is no work order transaction activity, or once new jobs for the day are loaded to the application.

> **Note:** Ensure that you run the gather schema statistics concurrent program for the schemas (WIP, INV, PO, BOM, PJM) before running the FullLoadConfig.grf

For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time while considering system load and performance. Discrete Work Order information such as work order header, operations, components, resources, exceptions, move transactions, and so on, is updated in the EBS system continuously. The status of work orders and operations are also updated in the EBS system throughout the day. Updates should be synchronized with the Endeca data domain with minimal lag, providing near real time shop floor status and data snapshots for analysis and actions throughout the day.

> **Important:** Patch 16184293:R12.WIP.C contains indexes that are

dependent on Last_Update_Date and is a separate (stand-alone) patch. For better performance for incremental load, it is critical that you apply patch 16184293:R12.WIP.C.

To Schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the schedule.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Specify the Sandbox as 'wip-dwo'
13. Specify the Graph as 'graph/IncrementalLoadConfig.grf'
14. Click Create to set the scheduler.

ETL Parameters for Oracle Discrete Manufacturing Information Discovery Plus

You can load data to the Oracle Discrete Work Order data domain by running graphs provided by the Oracle Discrete Work Order application.

To load data to the Oracle Work Order Search data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under csf-parts.

2. Graphs to load data include:

Graph Name	Description
FullLoadConfig.grf	This graph loads meta data and data from all views. It resets all records in the csf-parts data domain, and then loads data. Run this graph to load data for the Work Orders page. This graph will load data for part orders and debrief.
IncrementalLoadConfig.grf	This graph performs incremental load for part orders and debrief. Only those records that were updated subsequent to the last load are loaded. Note: Data deleted in EBS (Work Orders) will not be removed from Endeca by running Incremental Graph. You must run FullLoadConfig.grf graph to remove all the data from Endeca and then reload all data. Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system.

Important: Patch 16184293:R12.WIP.C contains indexes that are dependent on Last_Update_Date and is a separate (stand-alone) patch. For better performance for incremental load, it is critical that you apply patch 16184293:R12.WIP.C.

Note: Data deleted in EBS (Work Orders) will not be removed from Endeca by running Incremental Graph. You must run FullLoadConfig.grf graph to remove all the data from Endeca and then reload all data. Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system.

```
##### Endeca Server Specifics ######
ENDECA_SERVER_PORT=7770
DATA_STORE_NAME=WIP-DWO

##### Data Store Specifics ######
#MDEX_INDEX_DIRECTORY=${PROJECT}/mdex
MDEX_EXTRA_ARGS=<server-control:arg>--threads</server-control:
arg><server-control:arg>4</server-control:arg>
MDEX_PORT=7340
MDEX_BULK_PORT=7341
MDEX_TRANSACTION_ID=


##### EBS FND Table Specifics #####
LANGUAGE_CODE=US
INSTANCE_ID=9
LOAD_TYPE=F
FND_USER=1
RECORD_TYPE=DWO

### Misc ########
MULTIASSIGN_DELIMITER=\u007F

##### Sample Load View view_config.xml Location #####
viewXMLFile=sandbo//wix:p-dwo/data-out/view_config.xml
```

Views and Joins for Oracle Discrete Manufacturing Information Discovery Plus

The following views are used by the ETL layer in Endeca to load Oracle Discrete Work Order data to the Endeca data domain:

Full Load View

View Name	Purpose
WIP_DWO_ENDECA_V	Loads discrete work order information during full load.

Incremental Load Views

View Name	Purpose
WIP_ENDECA_INCR_COST_V	Loads work order cost information during incremental load.
WIP_ENDECA_INCR_EXCEP_V	Loads work order exceptions information during incremental load.

View Name	Purpose
WIP_ENDECA_INCR_NONE_V	Loads additional work order information not captured in other views during incremental load.
WIP_ENDECA_INCR_OPER_V	Loads work order operation information during incremental load.
WIP_ENDECA_INCR_RES_V	Loads work order resources information during incremental load.
WIP_ENDECA_INCR_SCRJ_V	Loads work order scrap and rejects information during incremental load.

Concurrent Processes for Oracle Discrete Manufacturing Information Discovery Plus

Concurrent Process	Description
Discrete Job Shortage Calculation	You must run this concurrent program before running the full load graph daily or nightly.
Gather Schema Statistics	You must run this concurrent program for the following schemas: WIP, INV, PO, BOM, PJM **Note:** You must run this concurrent program before executing the full load graph for the first time, and then schedule it to run weekly thereafter.

Note: You must run this concurrent program before executing the full load graph for the first time, and then schedule it to run weekly thereafter.

Menus for Oracle Discrete Manufacturing Information Discovery Plus

Oracle Discrete Work Order integration includes the following user menu:

User Menu Name	Internal Name
Endeca Discrete Work Order Information Discovery	WIP_WS_MAIN

Oracle Project Manufacturing Product Configuration

Overview

Complete the Oracle Project Manufacturing product configuration after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setting Up Oracle Project Manufacturing

1. Add the PJM Endeca Inquiry Role (UMX|PJM_ENDECA_INQUIRY_ROLE) to any predefined Oracle Project Manufacturing responsibility or to any custom Project Manufacturing responsibility. Update the Grant PJM Endeca Inquiry Grant (PJM_ENDECA_INQUIRY_GRANT) and the Permission Set PJM Endeca Inquiry Permission Set (PJM_ENDECA_INQUIRY_PS).

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: Appendix C: Adding Roles to Responsibilities and Setting Security Context in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

2. Run the Full Graph to complete the initial data load for Oracle Depot Repair Information Discovery.

   See: *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

3. Run the Full Load Graph.

   See: Running the Full Load Graph, page 10-53

4. Set up the Scheduler.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 10-54

Running the Full Load Graph

Once you have run the full load graph in accordance with *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Project Manufacturing Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select pjm-inq from the Sandbox list.
13. Select graph/FullLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler to Load Incremental Graphs

Once you have run the full load graph in accordance with *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the volume of information requiring update.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler, for example, Project Manufacturing Incremental Load Scheduler.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.

7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Execute graph from the Task Type list.

12. Select pjm-inq from the Sandbox list.

13. Select graph/IncroadConfig.grf from the Graph list.

14. Click Create to set the scheduler.

Views and Joins in Oracle Project Manufacturing

The following views are used by the ETL layer in Oracle Endeca to load and display Oracle Project Manufacturing for Oracle Endeca data to the Oracle Endeca data store:

- **PJM_EID_WORK_ORDERS_V** - View built on wip_discrete_jobs, wip_requirement_operations and wip_operations for work order, component and operation information.

- PJM_EID_LINE_SCHEDULES_V - View built on wip_flow_schedules & wip_lines for line schedule information.

- **PJM_EID_WIP_SHORTAGE_V** - View built on wip_ws_comp_shortage for implementing WIP Shortage Alert feature.

- **PJM_EID_PURCHASE_ORDERS_V** - View built on po_headers_all, po_lines_all, po_line_locations_all and po_distributions_all for purchase order information.

- **PJM_EID_REQUISITIONS_V** - View built on po_requisition_headers_all, po_requisition_lines_all and po_req_distributions_all for requisition information.

- **PJM_EID_BLANKET_RELEASES_V** - View built on po_releases_all &

po_headers_all for Blanket Release information.

- **PJM_EID_QUOTATIONS_V** - View built on po_headers_all for quotation information.
- **PJM_EID_RFQS_V** - View built on po_headers_all for RFQ information.
- **PJM_EID_COST_ACTIVITIES_V** - View built on wip_period_balances, mtl_transaction_accounts, cst_quantity_layers, cst_item_costs, mtl_onhand_quantities, for project cost information from cost source: Onhand Value, Purchase Price Variances, Project Level Cost Variances, WIP Value Summary, WIP Variances and Sales Order Issue.
- **PJM_EID_INVENTORY_BALANCE_V** - View built on mtl_onhand_quantities_detail table for project onhand balance information.
- **PJM_EID_ONHAND_VALUES_V** - View built on cst_quantity_layers and mtl_onhand_quantities_detail for project onhand value information.
- **PJM_EID_SALES_ORDERS_V** - View built on oe_order_headers_all and oe_order_lines_all for sales order information.
- **PJM_EID_PA_OVERDUE_V** - Procurement activity overdue exceptions.
- **PJM_EID_PA_SCHED_EXCP_V** - Procurement activity schedule exceptions.
- **PJM_EID_SO_OVERDUE_V** - Sales order overdue exceptions.
- **PJM_EID_SO_SCHED_EXCP_V** - Sales order exception exceptions.
- **PJM_EID_WIP_OVERDUE_V** - Work order overdue exceptions.
- **PJM_EID_WIP_SCHED_EXCP_V** - Work order schedule exceptions.

11

Oracle Enterprise Asset Management Information Discovery Plus

This chapter covers the following topics:

Overview

You can use Oracle Enterprise Asset Management Information Discovery Plus to search and filter assets, work requests, work orders, and item information. Using the Information Discovery dashboard pages, you can review and analyze data using key

Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using eAM pages and Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS. In eAM, the following region and pages enable search functions using Information Discovery integration:

- **Overview Region in the Maintenance Home Page**: This page under the Maintenance Home tab lets you search for work orders and assets. The page displays work order and asset metrics, work order charts, and a work order results table.

- **Assets Overview Page**: This page under the Assets tab lets you search for assets. The page displays asset metrics, asset charts, and an asset results table.

- **Work Requests Overview Page**: This page under the Work Request tab lets you search for work requests. The page displays work request metrics, work request charts, and a work request results table.

- **Work Orders Overview Page**: This page under the Work Order tab lets you search for work orders. The page displays work order metrics, work order charts, and a work orders results table.

- **Materials Overview Page**: This page under the Stores tab lets you search for items. The page displays item metrics and an item results table.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Enterprise Asset Management Information Discovery Plus application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

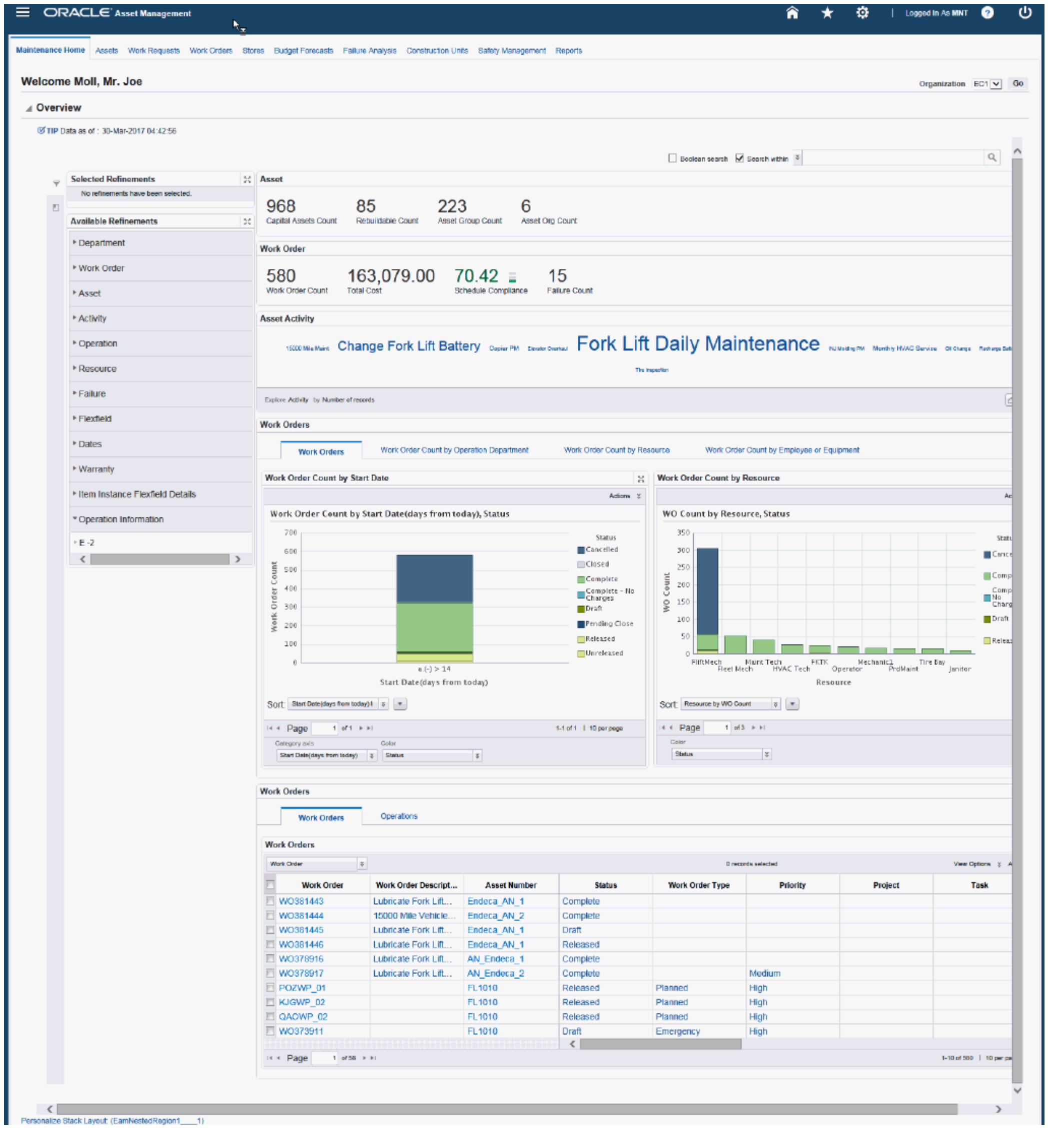
Oracle Enterprise Asset Management Information Discovery Plus User Interfaces

Overview Region in the eAM Maintenance Home Page

The Overview region in the eAM Mainenance Home page displays Endeca content for Oracle Enterprise Asset Management. You can search for work orders and assets, and view work order and asset metrics, work order charts, and a work order results table. The following is a partial display of the Endeca region in the eAM Maintenance Home page.

From the Maintenance Super User responsibility, navigate to the eAM Home page:

(N) Maintenance Super User > Home



Within the Overview region on the eAM Maintenance Home page, you can track work order and asset activity. You can analyze data and review work order and assets metrics, charts, graphs, and tables. The following describes the eAM Maintenance Home page Endeca regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Department • Work Order • Asset • Activity • Operation • Resource • Failure • Dates • Warranty • Flexfield Asset Attributes • Item Instance Flexfields • Discrete Job • Operation Information • Operation Resource

Region	Components
Asset (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Green: Good - Gray: Normal	• **Capital Asset Count** Number of distinct Capital Assets . • **Rebuildable Count** Number of distinct Rebuildable Assets. • **Asset Group Count** Number of distinct Asset Groups. • **Asset Org Count** Number of Asset Organizations to which different Assets are assigned.
Work Order (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Green: Good - Gray: Normal	• **Work Order Count** Number of distinct work orders. • **Total Cost** Sum of total actual cost in all the work orders. • **Schedule Compliance** (Number of completed work orders (on time) divided by number of scheduled work orders) x 100 • **Failure Count** Number of Work Orders which have failure data.
Asset Activity (tag cloud)	Top Ten Asset Activities Tag Cloud Component **Note:** The Asset Activity tag cloud component displays the top ten asset activities by frequency of occurrence.

Region	Components

Work Orders (tabbed component container)
Work Orders (tab)
	Work Order Count by Start Date (chart)
	• Sort Options
	  • Start Date (days from today)
	  • Start Date (days from today) by Work Order Count
	• Dimensions (category axis)
	  • Start Date (days from today)
	  • Month
	  • Quarter
	  • Year
	• Series Dimension (color)
	  • (none)
	  • Status
	  • Priority
	  • Type
	Work Order Count by Resource, Status (chart)
	• Sort Options
	  • Resource
	  • Resource By Work Order Count
	• Series Dimension (color)
	  • (none)
	  • Status

Region	Components
	• Priority • Type
Work Orders (tabbed component container) Work Order Count by Operation Department (tab)	Work Order Count by Operation Department (cross tab)
Work Orders (tabbed component container) Work Order Count by Resource (tab)	Work Order Count by Resource (cross tab)
Work Orders (tabbed component container) Work Order Count by Employee or Equipment (tab)	Work Order Count by Employee or Equipment (cross tab)

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Work Orders (results table)</td><td>Work Orders (tab) (results table)
Column Sets
Work Order
Asset
Activity
Department
Cost
Dates
Failure
Attachment
Flexfield
Warranty
Actions
Print
Export
Compare
Print Work Order Report
Export Work Order Schedule
Map All
Operations (tab) (results table)
Column Sets
Operation</td></tr>
</table>

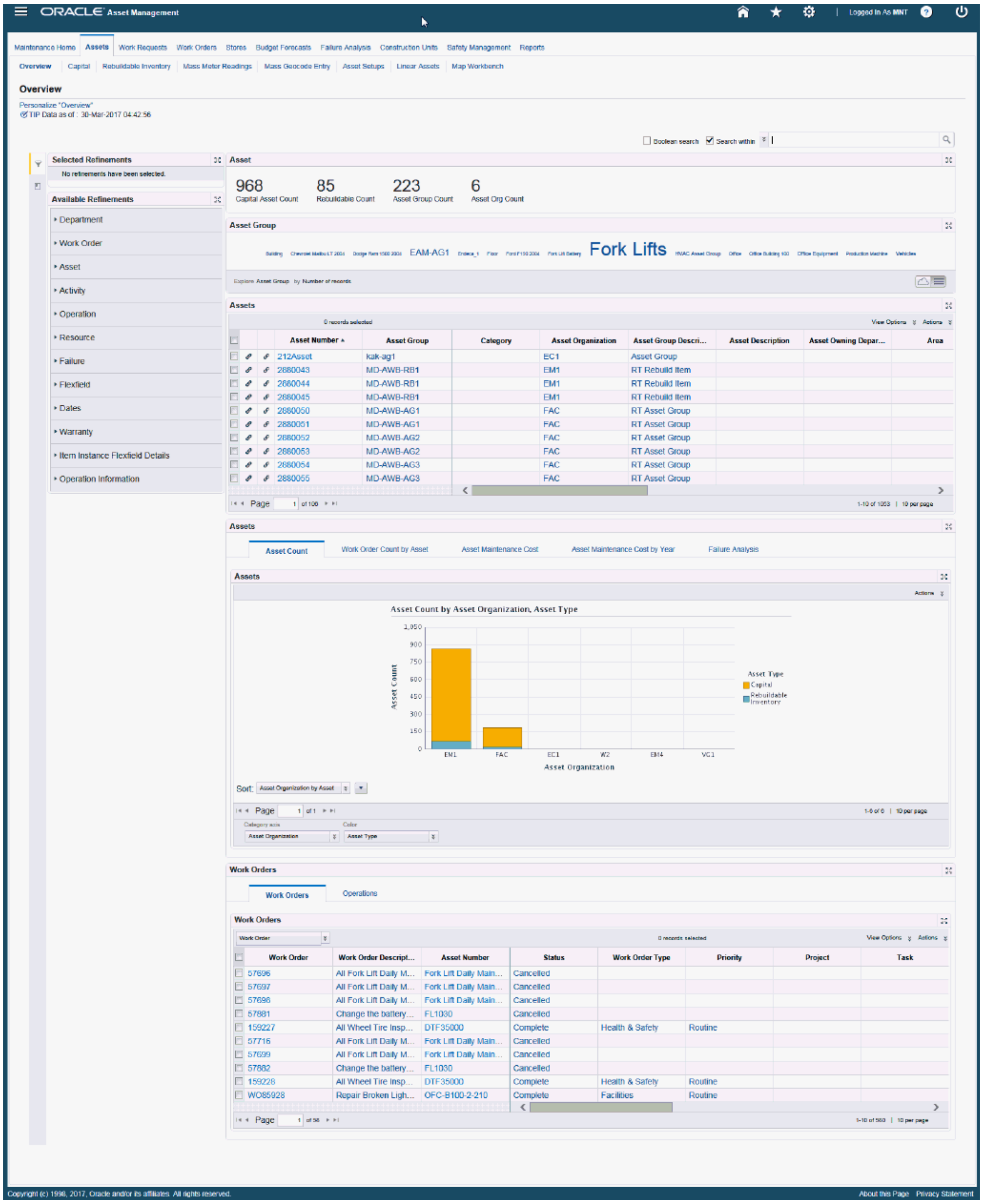
Region	Components
	- Work Order - Asset - Activity - Dates - Department - Resource - Cost - Failure - Attachment - Flexfield - Warranty • Actions - Print - Export - Print Work Order Report - Export Work Order Schedule - Map All

Assets Overview Page

Use the eAM Assets Overview page to search for and view asset information and activity. You can view asset metrics, asset charts, and an assets results table. The following is a partial display of the eAM Assets Overview page.

From the Maintenance Super User responsibility, navigate to the eAM Assets page:

(N) Maintenance Super User > Home > Assets (tab)



Within the eAM Assets Overview page, you can track assets and asset group activity. You can analyze data and review assets and activity, asset metrics, charts, graphs, and tables. The following describes the Endeca eAM Assets Overview page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Department • Work Order • Asset • Activity • Operation • Resource • Failure • Dates • Warranty • Flexfield Asset Attributes • Item Instance Flexfields • Discrete Job • Operation Information • Operation Resource

Region	Components
Asset (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Green: Good - Gray: Normal	• **Capital Asset Count** Number of distinct capital assets. • **Rebuildable Count** Number of distinct rebuildable assets. • **Asset Group Count** Number of distinct asset groups. • **Asset Org Count** Number of distinct asset organizations.
Asset Group (tag cloud)	Top Ten Asset Groups Tag Cloud Component **Note:** The Asset Groups tag cloud component displays the top ten asset groups by frequency of occurrence.

Region	Components

Assets (results table)	Assets (results table)
	• Actions
	  • Print
	  • Export
	  • Map All
	• Links
	  • Create Work Order icon - select this link to open the Create Work Order html page.
	  • Create Work Request icon - select this link to open the Create Work Request html page to request maintenance on an asset.
	  • Asset Number - select the Asset Number link for the selected row to open the Asset Details html page to view specific details about an asset number.

Region	Components

Assets (tabbed component container)
Asset Count (tab)
	Assets (chart)
	• Sort Options
	  • Asset Organization
	  • Asset Organization by Asset Count
	• Dimensions (category axis)
	  • Asset Organization
	  • Category
	  • Asset Group
	  • Area
	  • Asset Owning Department
	• Series Dimension (color)
	  • (none)
	  • Asset Type
	  • Maintainable

Assets (tabbed component container)
Work Order Count by Asset (tab)
	Work Orders (results table)
	• Actions
	  • Print
	  • Export

Assets (tabbed component container)
Asset Maintenance Cost (tab)
	Assets (results table)
	• Actions
	  • Print
	  • Export

Region	Components

Assets (tabbed component container)
Asset Maintenance Cost by Year (tab)
	Maintenance Cost for Assets by Year (cross tab)
	• Actions
	  • Export to Microsoft Excel
	  • Print

Region	Components

Assets (tabbed component container)
 	
Failure Analysis (tab)
	Cost Analysis by Failure
	• Sort Options
	  • Failure
	  • Total Cost (sum) by Failure
	• Metric (value axis)
	  • Total Cost (sum)
	  • Estimated Total Cost (sum)
	  • Total Equipment Cost (sum)
	  • Total Labor Cost (sum)
	  • Total Material Cost (sum)
	• Dimensions (category axis)
	  • Failure
	  • Asset Group
	  • Month
	  • Quarter
	  • Year
	• Series Dimension (color)
	  • (none)
	  • Failure
	  • Cause
	  • Resolution
	
	Cost Analysis by Cause

Region	Components
	- Sort Options - Cause - Total Cost (sum) by Cause - Metric (value axis) - Total Cost (sum) - Estimated Total Cost (sum) - Total Equipment Cost (sum) - Total Labor Cost (sum) - Total Material Cost (sum) - Dimensions (category axis) - Cause - Resolution - Asset Group - Month - Quarter - Year - Series Dimension (color) (none) - Failure - Cause - Resolution

Region	Components

Work Orders (tabbed component container)
Work Orders (tab)
	Work Orders (results table)
	• Column Sets
	  • Work Order
	  • Asset
	  • Activity
	  • Department
	  • Cost
	  • Dates
	  • Failure
	  • Attachment
	  • Flexfield
	  • Warranty
	• Links
	  • Work Order link - select this link for the selected row to open the Work Order Details html page.
	  • Asset Number link - select this link to open the Asset Details html page to view specific details about an asset number.
	• Actions
	  • Print
	  • Export
	  • Print Work Order Report

Region	Components
	• Export Work Order Schedule • Map All

Region	Components

Work Orders (tabbed component container)
 	
Operations (tab)
	Operations (results table)
	• Column Sets
	  • Operation
	  • Work Order
	  • Asset
	  • Activity
	  • Dates
	  • Department
	  • Resource
	  • Cost
	  • Failure
	  • Warranty
	  • Flexfield
	  • Attachment
	• Links
	  • Work Order link - select this link for the selected row to open the Work Order Details html page.
	  • Asset Number link - select this link to open the Asset Details html page to view specific details about an asset number.
	• Actions
	  • Print

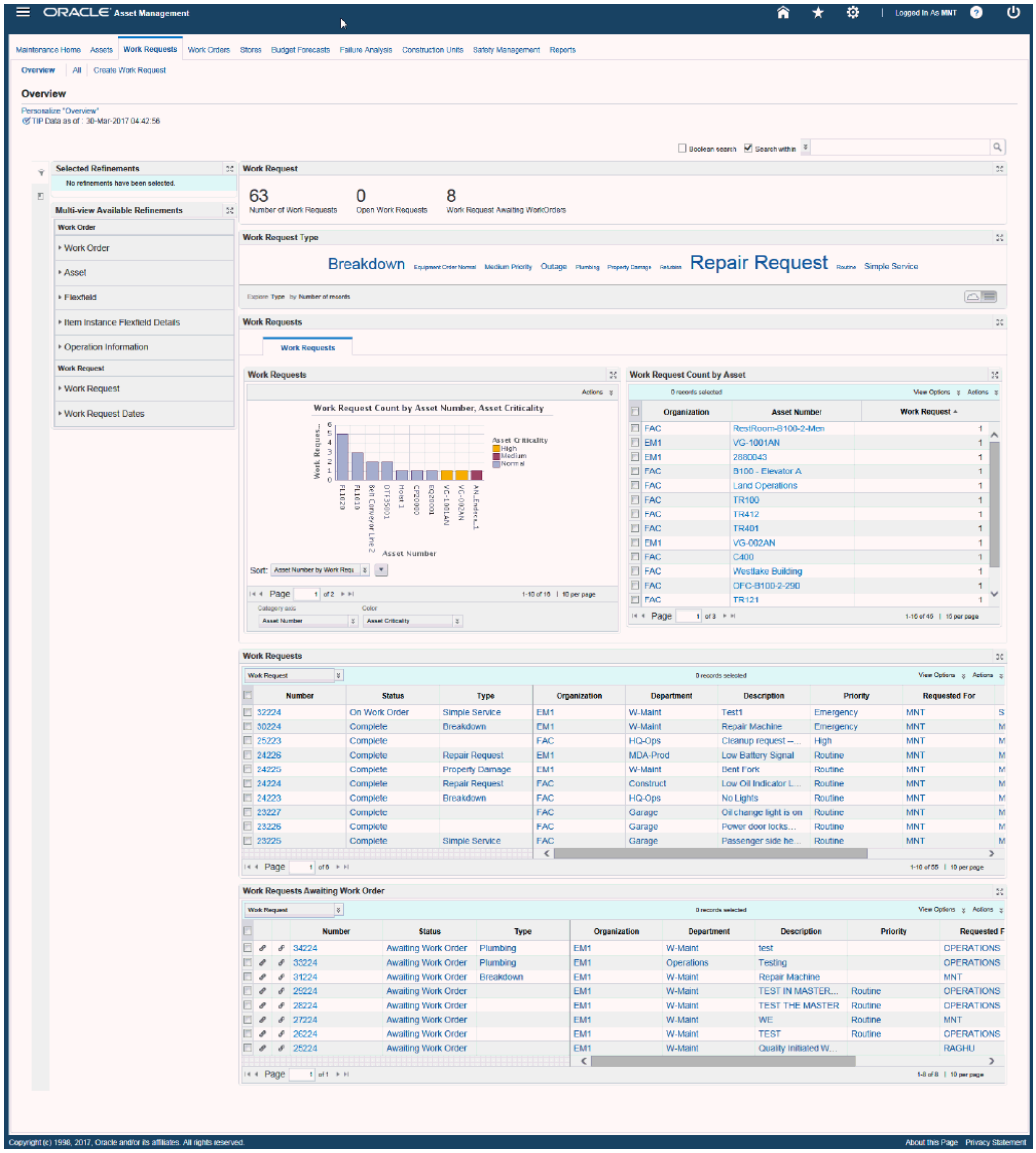
Region	Components
	• Export • Print Work Order Report • Export Work Order Schedule • Map All

Work Requests Overview Page

Use the Work Requests Overview page to search for work requests, work request types, and work request activity . You can view work request metrics, work request charts, and a work request results table. The following is a partial display of the eAM Work Requests Overview page.

From the Maintenance Super User responsibility, navigate to the eAM Work Requests page:

(N) Maintenance Super User > Home > Work Requests (tab)



Within the Work Requests page, you can track work requests and activity. You can analyze data and review work requests, metrics, charts, graphs, and tables. The following describes the Endeca eAM Work Requests page regions and components:

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Page Links</td><td>Overview - select this link to open the Endeca Work Requests Overview page to search for work requests, types, and work request activity.
All - select this link to open the Work Requests html page to search for existing work requests and create new work requests for an asset.
Create Work Request - select this link to open the Create Work Request html page to create new work requests for an asset.</td></tr>
<tr><td>Advanced Search
Boolean Search
Search within</td><td>The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.</td></tr>
<tr><td>Selected Refinements</td><td>The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.</td></tr>
<tr><td>Bookmarks</td><td>The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.</td></tr>
</table>

Region	Components
Multi-view Available Refinements	You can use the Multi-view Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: **Work Order** • Work Order • Asset • Flexfield Asset Attributes • Item Instance Flexfields • Discrete Job • Operation Information • Operation Resource **Work Request** • Work Request • Work Request Dates • Work Request Information • Work Request Information (Descriptive Flexfield)

Region	Components
Work Request (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Green: Good	• **Number of Work Requests** Total number of Work Requests. • **Open Work Requests** Number of Open Work Requests (Statuses: Open and Additional Information) • **Work Requests Awaiting Work Orders** Number of Work Requests awaiting Work Orders.
Work Request Type (tag cloud)	Top Ten Work Request Type Tag Cloud Component **Note:** The Work Request Type tag cloud component displays the top ten work request types by frequency of occurrence.

Region	Components

Work Requests (tabbed component container)
Work Requests (tab)
	Work Requests (chart)
	• Sort Options
	  • Asset Number
	  • Asset Number by Work Request Count
	• Dimensions (category axis)
	  • Asset Number
	  • Asset Category
	  • Asset Group
	  • Asset Area
	  • Organization
	• Series Dimensions (color)
	  • (none)
	  • Asset Criticality
	  • Asset Type
	  • Department
	  • Priority
	  • Request Type
	Work Request Count by Asset (cross tab)
	• Links
	  • Asset Number link - select this link to open the Asset Details html page for the selected row to view specific details about an asset number.

Region	Components

	• Actions
	  ◦ Print
	  ◦ Export

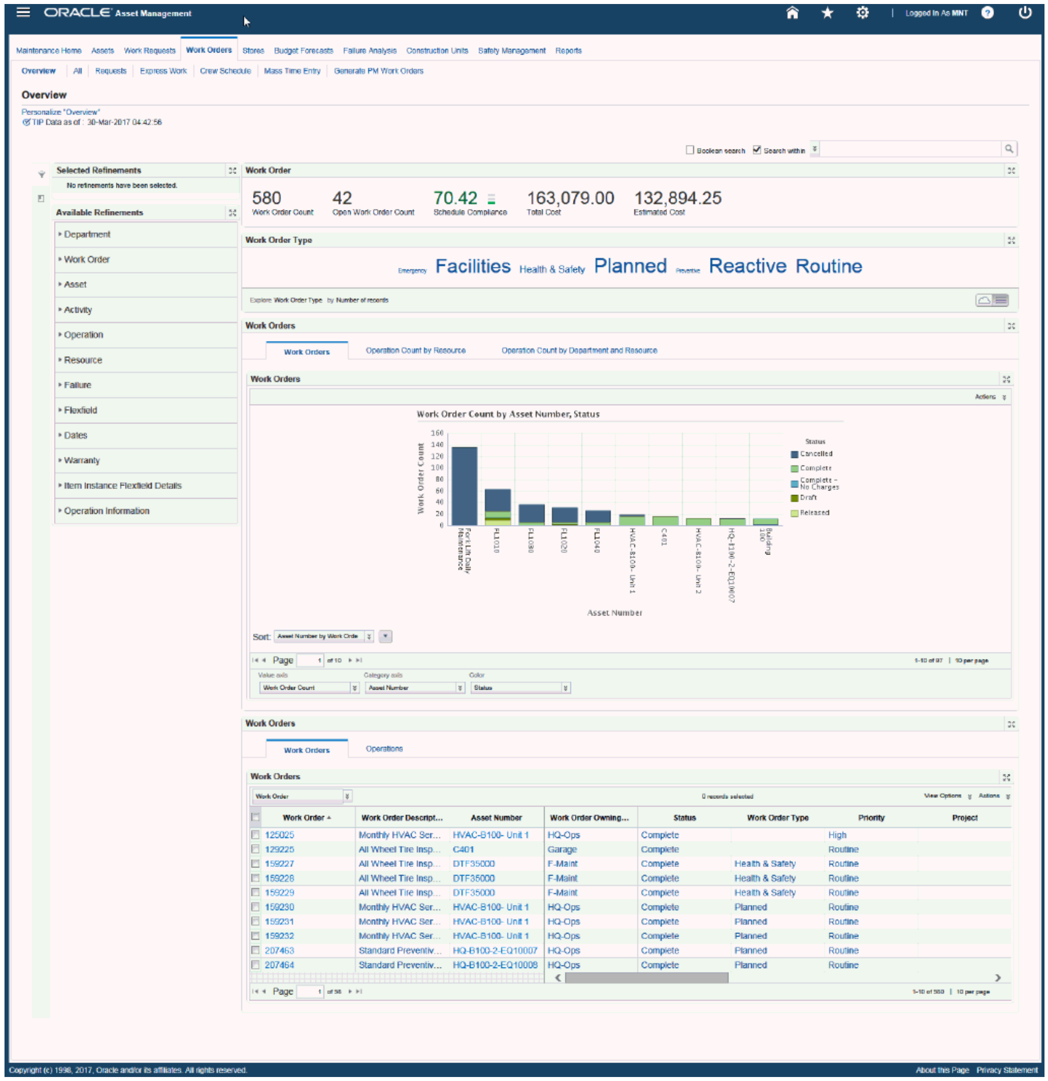
Work Requests (results table)	Work Requests (results table)
	• Column Sets
	  ◦ Work Request
	  ◦ Work Request Dates
	  ◦ Asset
	  ◦ Work Order
	  ◦ Flex Field
	• Links
	  ◦ Number link - select this link to open the View Work Request details html page.
	• Actions
	  ◦ Print
	  ◦ Export

Work Orders Overview Page

You can use the Work Orders Overview page to search for work orders, work order types, and work order activity. You can view work order metrics, work order charts, and a work orders results table. The following is a display of the eAM Work Orders Overview page.

From the Maintenance Super User responsibility, navigate to the eAM Work Orders Overview page:

(N) Maintenance Super User > Home > Work Orders (tab)



Within the Work Orders Overview page, you can track work orders and work order activity. You can analyze data and review work order orders, metrics, charts, graphs, and tables. The following describes the Endeca eAM Work Orders Overview page regions and components:

Region	Components
Page Links	• **Overview** - select this link to open the Endeca Work Orders Overview page to search for work orders, types, and work order activity. • **All** - select this link to open the Work Requests html page to search for existing work requests and create new work requests for an asset. • **Requests** - select this link to open the Requests Search page to search for and view work request details. • **Express Work** - select this link to open the Express Work Order html page to create work orders for work that has already been completed. • **Crew Schedule** - select this link to open the Crew Schedule html page to view work schedules. • **Mass Time Entry** - select this link to open the Mass Time Entry html page to enter time and operation details against a work order. • **Generate PM Work Orders** - select this link to open the Schedule Request html page to create Preventive Maintenance (PM) work orders.

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Department • Work Order • Asset • Activity • Operation • Resource • Failure • Dates • Warranty • Flexfield Asset Attributes • Item Instance Flexfields • Discrete Job • Operation Information • Operation Resource

Region	Components
Work Order (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Green: Good - Gray: Normal	• **Work Order Count** Number of distinct work orders. • **Open Work Order Count** Number of distinct Open work orders. • **Schedule Compliance** (Number of Work Orders completed on time divided by total number of Work Orders) x 100. Work Orders are completed on time if Actual Start Date of a Work Order is less than or equal to Scheduled Start Date. • **Total Cost** Sum of total actual cost in all work orders. • **Estimated Cost** Sum of total estimated cost in all work orders.
Work Order Type (tag cloud)	Top Ten Work Order Type Tag Cloud Component **Note:** The Work Order Type tag cloud component displays the top ten work order types by frequency of occurrence.

Region	Components

Work Orders (tabbed component container)
Work Orders (tab)
	Work Orders (chart)
	• Sort Options
	  • Asset Number
	  • Asset Number by Work Order Count
	• Metric (value axis)
	  • Work Order Count
	  • Actual Cost
	  • Estimated Cost
	  • Labor Cost
	  • Material Cost
	  • Equipment Cost
	• Dimensions (category axis)
	  • Asset Number
	  • Asset Group
	  • Category
	  • Organization
	  • Work Order Owning Department
	  • Source
	  • Cause
	  • Activity Type
	  • Schedule Name
	  • Project

Region	Components

	- Task
	- Series Dimensions (color)
	  - (none)
	  - Status
	  - Work Order Type
	  - Priority
	  - Asset Type
	  - Criticality
	  - Cause
	  - Failure
	  - Resolution

Work Orders (tabbed component container)
Operation Count by Resource (tab)
	Operations Assigned to Employee or Equipment (results table)
	- Actions
	  - Print
	  - Export
	Operations Assigned to Resource (results table)
	- Actions
	  - Print
	  - Export

Region	Components

Work Orders (tabbed component container)
 	
Operation Count by Department and Resource (tab)
	Operation Count by Operation Department and Resource (cross tab)
	• Actions
	  • Export to Microsoft Excel
	  • Print

Work Orders (tabbed component container)
 	
Work Orders (tab)
	Results Table
	• Column Sets
	  • Work Order
	  • Dates
	  • Asset
	  • Activity
	  • Cost
	  • Failure
	  • Attachment
	  • Flexfield
	  • Warranty
	• Actions
	  • Print
	  • Export
	  • Print Work Order Report
	  • Export Work Order Schedule
	  • Map All

Region	Components

Work Orders (tabbed component container)
Operations (tab)
	Results Table
	• Column Sets
	  • Operation
	  • Work Order
	  • Asset
	  • Activity
	  • Department
	  • Resource
	  • Cost
	  • Dates
	  • Failure
	  • Attachment
	  • Flexfield
	  • Warranty
	• Actions
	  • Print
	  • Print Work Order Report
	  • Export Work Order Schedule
	  • Map All
	  • Export
	Note: You can select a Work Order from the list and add operations

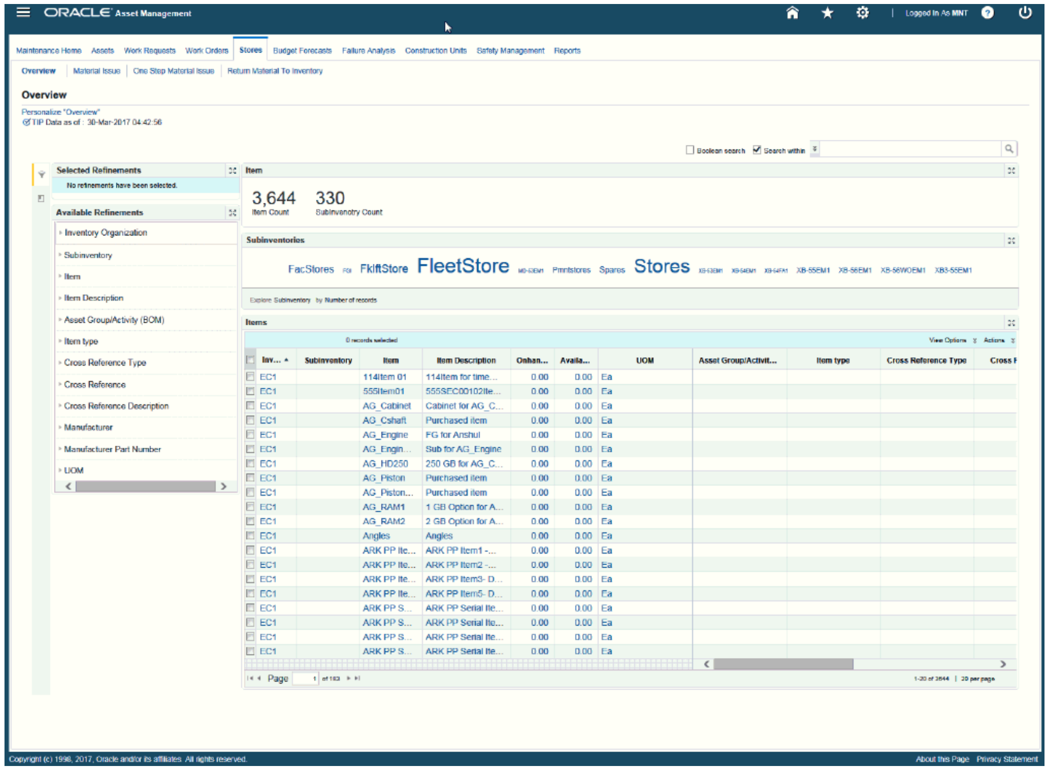
Region	Components
	attachments against the work orders in EBS for various file formats. Format types allowed include: • Long Text • Short Text • File • URL

Materials Overview Page

Use the Materials Overview page under the Stores tab to search for items, item details, and activity. You can view item metrics. subinventories, and an item results table. The following is a display of the eAM Materials Overview page.

From the Maintenance Super User responsibility, navigate to the eAM Materials Overview page:

(N) Maintenance Super User > Home > Stores (Tab)



Within the Materials Overview page, you can track item, inventory, and sub-inventory information and activity. You can view item and inventory, metrics, and an Item results table. The following describes the Endeca eAM Materials Overview page regions and components:

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Page Links</td><td>Overview - select this link to open the Endeca Material Overview page to search for items, item details, and activity.
Material Issue - select this link to open the Material Issue html page to search for material allocations by material request number.
One Step Material Issue - select this link to open the One Step Material Issue html page. A one-step material issue does not create a request and is used to issue one-off or ad hoc material to a work order.
Return Material to Inventory - select this link to open the Return Material to Inventory html page to return material to inventory from a maintenance work order. Only material issued to work orders can be returned to Inventory.</td></tr>
<tr><td>Advanced Search
Boolean Search
Search within</td><td>The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.</td></tr>
<tr><td>Selected Refinements</td><td>The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.</td></tr>
</table>

Region	Components
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Inventory Organization • Subinventory • Item • Item Description • Asset Group/Activity (BOM) • Item Type • Cross Reference Type • Cross Reference • Cross Reference Description • Manufacturer • Manufacturer Part Number • UOM
Item (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Green: Good - Gray: Normal	• **Item Count** Total Items • **Subinventory Count** Total subinventory items.

Region	Components
Subinventories (tag cloud)	Top Ten Subinventories Tag Cloud Component **Note:** The Subinventories tag cloud component displays the top ten subinventories by frequency of occurrence.

Items (results table)	Items (results table)
	• Actions
	  • Print
	  • Export

Oracle Enterprise Asset Management Information Discovery Plus Product Configuration

Setting Up Oracle Enterprise Asset Management Information Discovery Plus

The Oracle Enterprise Asset Management (eAM) application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Enterprise Asset Management Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 11-45 by assigning UMX roles and updating access grants.
2. Load eAM data to the Endeca Data Domain, page 11-46 by running graphs provided by eAM.
3. Schedule Setup for Full Endeca Refresh, page 11-46.
4. Set Profile Options, page 11-48.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Enterprise Asset Management (eAM)

As part of the Oracle E-Business Suite-EID integration for the Oracle Enterprise Asset Management (eAM) application, the following UMX Role is provided:

UMX Role	Internal Code Name
EAM Endeca Access Role	UMX|EAM_ENDECA_ ACCESS_ROLE

You must add the new UMX role 'EAM Endeca Access Role' (Internal Code Name: UMX|EAM_ENDECA_ ACCESS_ROLE) to enable Endeca menus for the Maintenance Super User responsibility (or any other custom responsibility which is using the same menu). You must assign this UMX role to the responsibility. When this UMX role is assigned to the eAM Information Portal, the Information Discovery tab appears.

If you want to use the Endeca-related role with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process instead of while you are adding the role to the responsibility.

Complete the following steps to enable Endeca Menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.

2. Update EAM_ENDECA_ACCESS_GRANT Grant.

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Loading eAM Data into the Data Domain

Clover ETL within Endeca queries eAM Views and does a full data load to the eAM data domain in Endeca. After the first data load, full data load or incremental data load can be performed periodically. Incremental data load will update all the records in the Endeca eAM data domain which were updated in EBS after the last load. After the data has been loaded in the eAM data domain, it can be queried and shown in the eAM pages.

eAM Data Sources in eAM Data Domain

Three data sources are defined in the eAM data domain in Endeca and are used to query data for different pages in eAM. These data sources include:

- **eam-wo**: This data source queries data for the Home Page, Work Order page, and Asset Page.

- **eam-wr**: This data source queries data for the Work Request Page.

- **eam-mat**: This data source queries data for the Stores Page.

Setting Up the Scheduler for Endeca Full Refresh

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.

7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Start a graph from the Task Type list.

12. Select the graph for schedule to run. I.e. Full.grf/incremental.grf.

13. Click Create to set the scheduler.

ETL Parameters for Enterprise Asset Management (eAM)

You can load data to the eAM data domain by running graphs provided by eAM.

To load data to the eAM data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under eAM.

2. Graphs to load data include:

   - **LoadDataFull.grf**: This graph loads data from Work Order View, Work Request View, and Material View. This graph is for internal use.

   - **LoadDataIncr.grf**: This graph loads incrementally changed order line transaction data. This graph is for internal use.

   - **Full.grf**: This graph loads metadata and data from all views. It resets all records in the eAM data domain, and then loads data. Run this graph if you plan to load data for all pages. This graph will load data for Home, Assets, Work Requests, Work Orders, and Material pages.

   - **Incremental.grf**: This graph performs incremental load for work orders, work requests and assets. Only those records that were updated subsequent to the last load are loaded.

> **Note:** Data deleted in EBS (eAM) will not be removed from Endeca by running Incremental Graph. You must run Full.grf graph to remove all the data from Endeca and reload everything. If you are loading data for the first time, then run Full.grf only. You can run other graphs according to your requirements. Run Incremental.grf periodically. You can set up this graph from the Scheduling tab.

Profile Options for Enterprise Asset Management (eAM)

You must set the following profile options if you do not want to load all historical data. Oracle recommends that you load data for all years. If you do not set the following profile options, then all Work Order, Asset, and Work Request data will be loaded.

Profile Option Name	Description
EAM : Endeca Work Order Data Load Start Date (mm/dd/yyyy)	Loads all Work Orders created on and after the specified date to the Endeca Data Domain.
EAM : Endeca Work Request Data Load Start Date (mm/dd/yyyy)	Loads all Work Requests created on and after the specified date to the Endeca Data Domain.
FND: Endeca Portal URL	This profile acts as the gateway between EBS and Endeca to bring the Endeca pages from the Endeca Studio Portal Server.

Views and Joins for Enterprise Asset Management (eAM)

The following views are used by the ETL layer in Endeca to load eAM data to the Endeca data domain:

View Name	Purpose
EAM_EID_WORK_ORDERS_V	Loads work order and asset data
EAM_EID_WORK_REQUESTS_V	Loads work request data

View Name	Purpose
EAM_EID_MATERIALS_V	Loads material data

The following temporary views are used as part of parallel processing for use with flexfields and attachments.

View Name	Purpose
EAM_EID_WO_PROCESS_TEMP	Loads flexfield and attachments of work orders and assets.
EAM_EID_WR_PROCESS_TEMP	Loads work request flexfield and attachment details.
EAM_EID_MAT_PROCESS_TEMP	Loads flexfield and attachment details for materials in the Store (Materials) page.

Menus for Endeca Enterprise Asset Management (eAM)

Endeca Enterprise Asset Management (eAM) integration includes nine new user menu functions as follows:

User Function Name	Function Name
EAM Endeca Home Page Destination	EAM_ENDECA_HOME_DEST
EAM Endeca Asset Landing Page	EAM_ENDECA_ASSET_LANDING_PAGE
EAM Endeca Assets Page Destination	EAM_ENDECA_ASSET_DEST
EAM Endeca Work Order Landing Page	EAM_ENDECA_WO_LANDING_PAGE
EAM Endeca Work Order Page Destination	EAM_ENDECA_WO_DEST
EAM Endeca Work Request Landing Page	EAM_ENDECA_WR_LANDING_PAGE
EAM Endeca Work Request Page Destination	EAM_ENDECA_WR_DEST

User Function Name	Function Name
EAM Endeca Stores Landing Page	EAM_ENDECA_MAT_LANDING_PAGE
EAM Endeca Stores Page Destination	EAM_ENDECA_MAT_DEST

- **Home**: One new function added to the existing Home menu
- **Asset**: Two new functions added to the existing Assets menu
- **Work Order**: Two new functions added to the existing Work Orders menu
- **Work Request**: Two new functions added to the existing Work Request menu
- **Materials (Under Stores Tab)**: Two new functions added to the existing Stores menu
- **Permission Set**: New Permission set 'EAM Endeca Access Permission Set' has been created and all new functions are assigned to this permission set

12

Oracle Field Service Information Discovery Plus

This chapter covers the following topics:

- Overview
- Field Service Tasks Summary Page
- Field Service Parts Summary Page
- Field Service Information Discovery Plus Administrator Portal
- Setting Up Oracle Field Service Information Discovery Plus
- Setup and Configuration Steps
- Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Field Service
- Scheduling Setup for Full Endeca Upload or Refresh
- ETL Parameters for Oracle Field Service
- Views and Joins for Oracle Field Service Information Discovery Plus
- Menus for Oracle Field Service Information Discovery Plus

Overview

Oracle Field Service Information Discovery Plus enables you to search and filter Field Service Execution data and Spares Supply Chain data. You can use the Oracle Field Service Tasks Summary and Field Service Parts Summary pages to view and analyze the data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables for Field Technicians, Field Service Tasks, and Spares Management.

This chapter provides product-specific details required to integrate Information Discovery with Oracle E-Business Suite Release 12.2 V8 for the Oracle Field Service

Information Discovery Plus application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

Oracle Field Service Information Discovery Plus User Interfaces

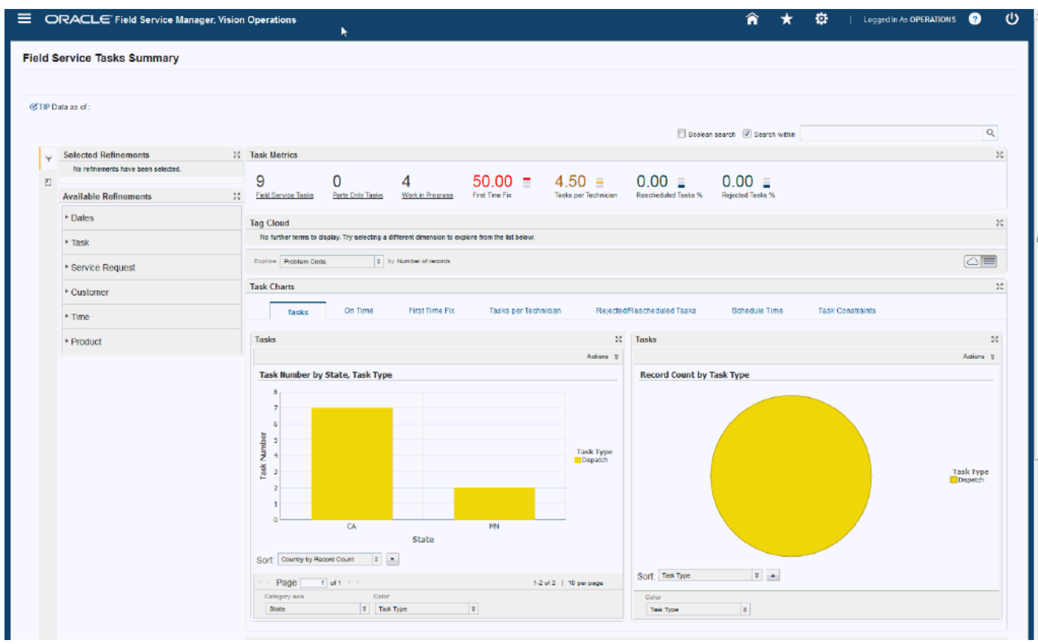
Field Service Tasks Summary Page

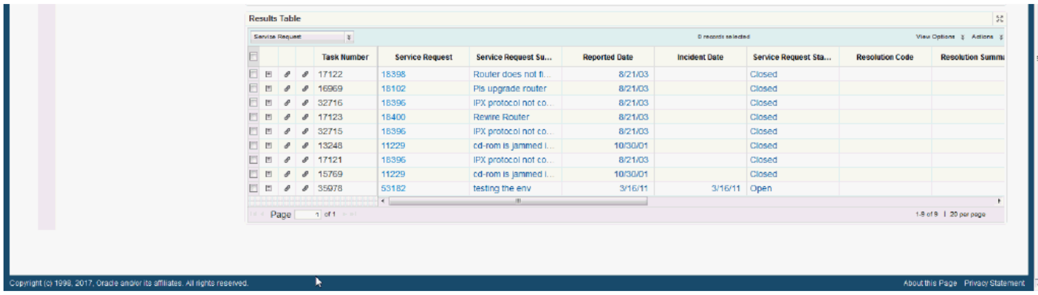
You can use the Field Service Tasks Summary page to view Key Performance Indicators (KPIs) and Metrics for measuring the efficiency of field operations. You can drill down into Field Service Tasks and Technician information using guided navigation, tag cloud, charts, and a results table that displays attributes and various dimensions. You can also export results table data to an Excel spreadsheet.

The following is a display of the Field Service Tasks Summary page.

From the Field Service Manager responsibility, navigate to the Field Service Tasks Summary page:

(N) Field Service Manager > Field Service Tasks Summary





Within the Field Service Tasks Summary page, you can view and analyze field performance data using display tools that include metrics, charts, graphs, and tables. The following describes the Endeca Field Service Tasks Summary page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: Dates • Planned Start Time • Scheduled Start Time • Task Creation Date Task • Task Priority • Task Type • Task Status • First Time Fix • Closed • Owner • Resource Name • Started on Time • Finished on Time • Times Rescheduled • Times Rejected • Number of Required Parts • Number of Required Skills • Customer Confirmation

Region	Components
	• After Hours • Access Hours Service Request • Service Request Severity • Service Request Type • Service Request Status • Service Request Owner • Problem Code • Resolution Code Customer • Customer Name • Address • Postal Code • City • State • Country Product • Product Category • Product Number • Product Description • Serial Number

Region	Components
Task Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning - Grey: Normal - Green: Good	• Field Service Tasks • Parts Only Tasks • Work in Progress • Started On Time • Finished on Time • First Time Fix • Tasks per Technician • Median Schedule Time • Rescheduled Tasks • Rejected Tasks
Tag Cloud	Top Ten Problem Codes Tag Cloud Component **Note:** The Problem Code tag cloud component displays the top ten tasks by frequency of occurrence for the following: • Problem Code • Customer Name • Resource Name • Task Type • Month

Region	Components

Tasks Charts (tabbed component container)
 	
Tasks (tab)
	Tasks (bar chart)
	• Sort Options
	  • Country
	  • Country by Record Count (count)
	• Dimensions (category axis)
	  • Country
	  • State
	  • City
	  • Customer Name
	  • Resource Name
	  • Year
	  • Year-Month
	  • Month
	  • Week
	• Series Dimensions (color)
	  • (none)
	  • Task Type
	  • Task Priority
	  • Task Status
	  • Problem Code
	  • Started on Time
	  • Finished on Time

Region	Components

	- Year
	- Year-Month
	- Month
	- Week
	- Day of Week
	- After Hours
	- Access Hours
	- Customer Confirmation
	
	Tasks (pie chart)
	- Sort Options
	  - Task Type
	  - Task Type by Record Count
	- Series Dimensions (color)
	  - Task Type
	  - Task Priority
	  - Task Status
	  - Problem Code
	  - Started on Time
	  - Finished on Time
	  - Year
	  - Year-Month

Region	Components
	• Month • Week • Day of Week • Access Hours • After Hours • Customer Confirmation

Region	Components

Tasks Charts (tabbed component container)
On Time (tab)
	On Time (bar chart)
	• Sort Options
	  • Country
	  • Country by Started On Time
	• Metric (value axis)
	  • Started on Time
	  • Finished on Time
	  • Started on Time, Finished on Time
	• Dimensions (category axis)
	  • Country
	  • State
	  • City
	  • Customer Name
	  • Problem Code
	  • Task Type
	  • Task Priority
	  • Task Status
	  • Resource Name
	  • Year
	  • Year-Month
	  • Week
	  • Day of Week

Region	Components

	• After Hours
	• Access Hours
	• Customer Confirmation
	
	On Time, Effort, Duration (trend chart)
	• Sort Options
	  • Year
	  • Year by Started on Time
	  • Year by Finished on Time
	• Dimensions (category axis)
	  • Year
	  • Year-Month
	  • Month
	  • Week
	  • Day of Week

Region	Components

Tasks Charts (tabbed component container)
First Time Fix (tab)
	First Time Fix (bar chart)
	• Sort Options
	  • Country
	  • Country by First Time Fix
	• Dimensions (category axis)
	  • Country
	  • State
	  • City
	  • Customer Name
	  • Resource Name
	  • Problem Code
	  • Task Type
	  • Task Priority
	  • Task Status
	  • Year
	  • Year-Month
	  • Month
	  • Week
	  • Day of Week
	  • Access Hours
	  • After Hours
	  • Customer Confirmation

Region	Components

	First Time Fix (trend chart)
	• Dimensions (category axis)
	  • Year
	  • Year-Month
	  • Month
	  • Week
	  • Day of Week

Region	Components

Tasks Charts (tabbed component container)
Tasks per Technician (tab)
	Tasks per Technician (bar chart)
	• Sort Options
	  • Country
	  • Country by Tasks per Technician
	• Dimensions (category axis)
	  • Country
	  • State
	  • City
	  • Customer Name
	  • Resource Name
	  • Problem Code
	  • Task Type
	  • Task Priority
	  • Task Status
	  • Year
	  • Year-Month
	  • Month
	  • Week
	  • Day of Week
	  • Access Hours
	  • After Hours
	  • Customer Confirmation

Region	Components

	Tasks per Technician (trend chart)
	• Dimensions (category axis)
	    • Year
	    • Year-Month
	    • Month
	    • Week
	    • Day of Week

Region	Components

Tasks Charts (tabbed component container)
Rejected/Rescheduled Tasks (tab)
	Rejected/Rescheduled Tasks (bar chart)
	• Sort Options
	  • Country
	  • Country by Rejected
	• Metric (value axis)
	  • Rejected
	  • Rescheduled
	  • Times Rejected (sum)
	  • Times Rescheduled (sum)
	• Dimensions (category axis)
	  • Country
	  • State
	  • City
	  • Customer Name
	  • Resource Name
	  • Problem Code
	  • Task Type
	  • Task Priority
	  • Task Status
	  • Year
	  • Year-Month
	  • Month

Region	Components

	• Week
	• Day of Week
	• Access Hours
	• After Hours
	• Customer Confirmation
	
	Rejected/Rescheduled Tasks (pie chart)
	• Sort Options
	  • Task Type
	  • Task Type by Times Rejected (sum)
	• Metric (value)
	  • Times Rejected (sum)
	  • Times Rescheduled (sum)
	• Dimensions (Color)
	  • Task Type
	  • Task Status
	  • Task Priority
	  • Problem Code
	  • Year
	  • Year-Month
	  • Month
	  • Week

Region	Components
	• Day of Week • Started on Time • Finished on Time • Access Hours • After Hours • Customer Confirmation

Region	Components

Tasks Charts (tabbed component container)
 	
Schedule Time (tab)
	Schedule Time (bar chart)
	
	• Sort Options
	    • Country
	    • Country by Schedule Time (Minutes) (median)
	• Metric (value axis)
	    • Schedule Time (Minutes) (median)
	    • Schedule Time (Minutes) (average)
	    • Schedule Time (Minutes) (sum)
	• Dimension (category axis)
	    • Country
	    • State
	    • City
	    • Customer Name
	    • Resource Name
	    • Problem Code
	    • Task Type
	    • Task Priority
	    • Task Status
	    • Year
	    • Year-Month
	    • Week

Region	Components

	• Day of Week
	• Access Hours
	• After Hours
	• Customer Confirmation
	
	Schedule Time (trend chart)
	• Metric (value axis)
	  • Schedule Time (Minutes) (median)
	  • Schedule Time (Minutes) (average)
	  • Schedule Time (Minutes) (sum)
	• Dimensions (category axis)
	  • Year
	  • Year-Month
	  • Month
	  • Week
	  • Day of Week

Region	Components

Tasks Charts (tabbed component container)
Task Constraints (tab)
	Task Constraints (bar chart)
	• Sort Options
	  • Country
	  • Country by Parts Required
	  • Country by Skills Required
	  • Country by Access Hours Required
	  • Country by After Hours Required
	  • Country by Confirmation Required
	• Metric (value axis)
	  • (All Task Constraints)
	  • Parts Required
	  • Skills Required
	  • Access Hours Required
	  • After Hours Required
	  • Customer Confirmation Required
	  • Number of Required Parts (sum)
	  • Number of Required Skills (sum)
	• Dimensions (category axis)
	  • Country
	  • State
	  • City
	  • Customer Name

Region	Components

	- Problem Code
	- Task Type
	- Task Priority
	- Task Status
	- Year
	- Year-Month
	- Month
	- Week
	- Day of Week
	
	Task Constraints (trend chart)
	- Metric (value axis)
	  - (All Task Constraints)
	  - Parts Required
	  - Skills Required
	  - Access Hours Required
	  - After Hours Required
	  - Customer Confirmation Required
	  - Number of Required Parts (sum)
	  - Number of Required Skills (sum)
	- Dimensions (category axis)
	  - Year

Region	Components
	• Year-Month • Month • Week • Day of Week
Results Table	Column Sets: • Service Request • Customer • Product • Time • Task

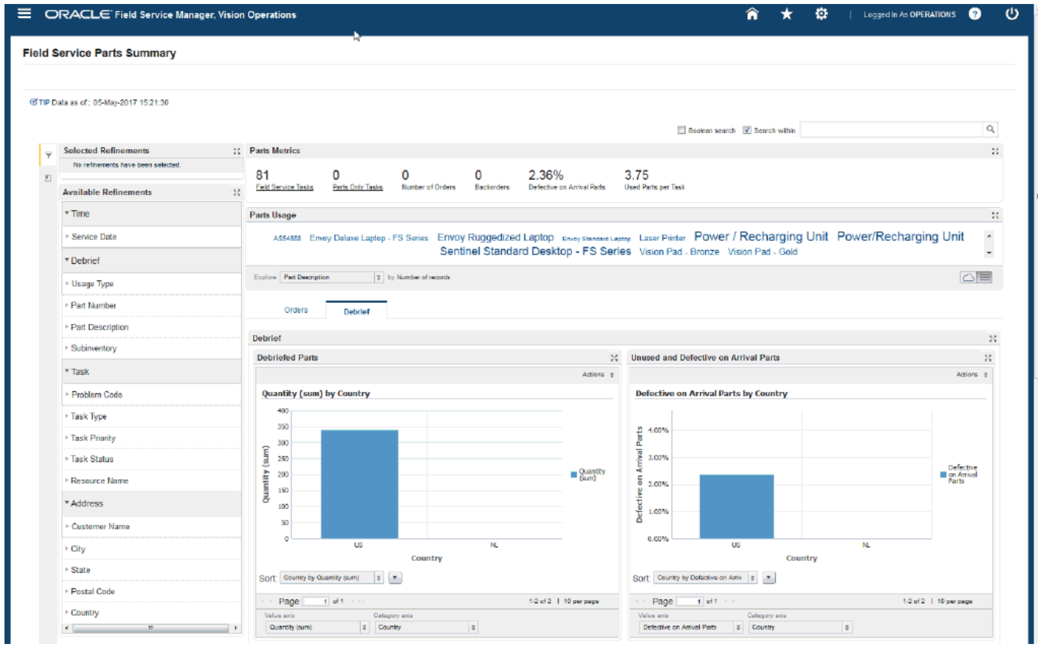
Field Service Parts Summary Page

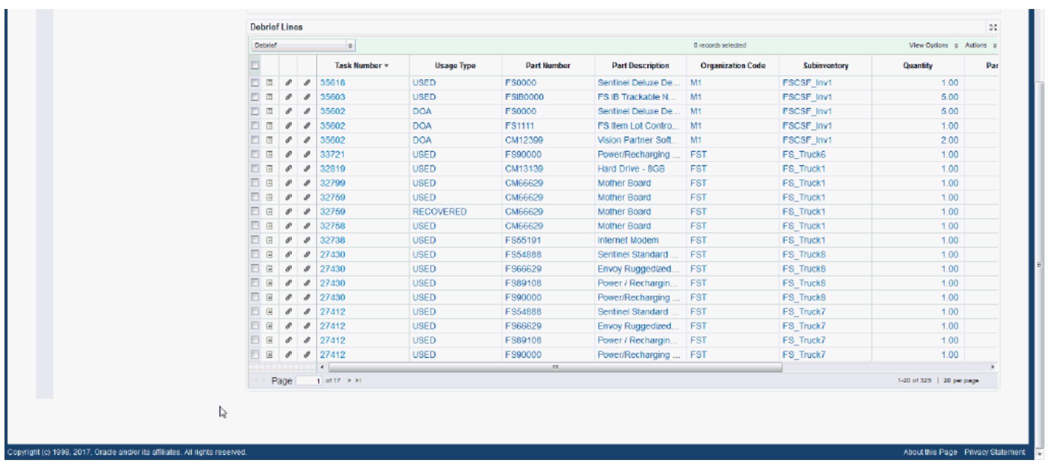
You can use the Field Service Parts Summary page to view Key Performance Indicators (KPIs) and Metrics for spare parts usage, parts orders and back orders pending, and areas of concern. This information is vital for decision making to further improve the operational efficiency of warehouse and service supply chain operations. You can drill down into parts orders, backorders, and debrief information using guided navigation, tag cloud, charts, and a results table that displays attributes and various dimensions. You can also export results table data to an Excel spreadsheet.

The following is a display of the Field Service Parts Summary page.

From the Field Service Manager responsibility, navigate to the Field Service Parts Summary page:

(N) Field Service Manager > Field Service Parts Summary





Within the Field Service Parts Summary page, you can view and analyze the efficiency of Spares Supply Chain and Logistics Operations, based on the analysis of data related to Spare Parts Consumption, Parts Orders, Backorders, Unused Parts, Parts Dead on Arrival (DOA), and Parts utilization per Task using display tools that include metrics, charts, graphs, and tables. The following describes the Endeca Field Service Parts Summary page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: Time • Service Date • Actual Shipping Date • Actual Arrival Date Order • Order Status • Shipping Method • Shipped on Time • Received on Time • Fulfilled Debrief • Usage Type • Part Number • Part Description • Subinventory • Product Number • Product Description Task • Problem Code

Region	Components
	• Task Type • Task Priority • Task Status • Resource Name Address • Address Type • Customer Name • Address • City • State • Postal Code • Country Service Request • Service Request Severity • Service Request Type • Service Request Status • Service Request Owner • Problem Code • Resolution Code

Region	Components
Parts Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning - Grey: Normal - Green: Good	Parts Metrics • Number of Orders • Backorders • Unused Parts • Defective on Arrival Parts • Used Parts per Task
Parts Usage (tag cloud)	Top Ten Parts Tag Cloud Component **Note:** The Parts Usage tag cloud component displays the top ten parts by frequency of occurrence. The Tag Cloud is dynamically rendered based on distinct Part Names associated with all Field Service Tasks in the system. Tag cloud can be used to filter the displayed records based on the tag clicked by the user.

Region	Components

Charts (tabbed component container)
Orders (tab)
	Order Number Count (bar chart)
	• Sort Options
	  • Country
	  • Country by Number of Orders
	• Dimensions (category axis)
	  • Country
	  • State
	  • City
	  • Customer Name
	  • Order Status
	  • Customer Name
	  • Organization Code
	  • Address Type
	  • Shipping Method
	  • Product Number
	  • Part Category
	  • Part Number
	  • Resource Name
	  • Task Priority
	  • Task Status
	  • Task Type
	  • Year

Region	Components
	- Year-Month - Month - Week - Day of Week • Series Dimension (color) - (none) - Task Priority - Task Status - Task Type - Part Category - Part Number - Product Number - Country - State - City - Customer Name Received and Shipped on Time (bar chart) • Sort Options - Country - Country by Received on Time • Metric (value axis)

Region	Components
	- Received on Time - Shipped on Time - Received on Time, Shipped on Time • Dimensions (category axis) - Country - Order Status - Customer Name - Organization Code - Address Type - Shipping Method - Part Category - Product Number - Resource Name - Task Priority - Task Status - Task Type - Year - Year-Month - Month - Week - Day of Week

Region	Components

Charts (tabbed component container)
Debrief (tab)
	Debrief (chart)
	• Sort Options
	  • Country
	  • Country by Quantity (sum)
	• Metric (value axis)
	  • Quantity (sum)
	  • Parts per Task
	• Dimension (category axis)
	  • Country
	  • Usage Type
	  • Customer Name
	  • Organization Code
	  • Subinventory
	  • Product Number
	  • Part Category
	  • Part Number
	  • Resource Name
	  • Task Priority
	  • Task Status
	  • Task Type
	  • Problem Code
	  • Year

Region	Components
	- Year-Month - Month - Week - Day of Week Unused and Defective on Arrival Parts (chart) - Sort Options - Country - Country by Unused Parts - Metric (value axis) - Unused Parts - Defective on Arrival Parts - Unused Parts, Defective on Arrival Parts - Dimensions (category axis) - Country - Usage Type - Customer Name - Organization Code - Subinventory - Product Number - Part Category - Part Number

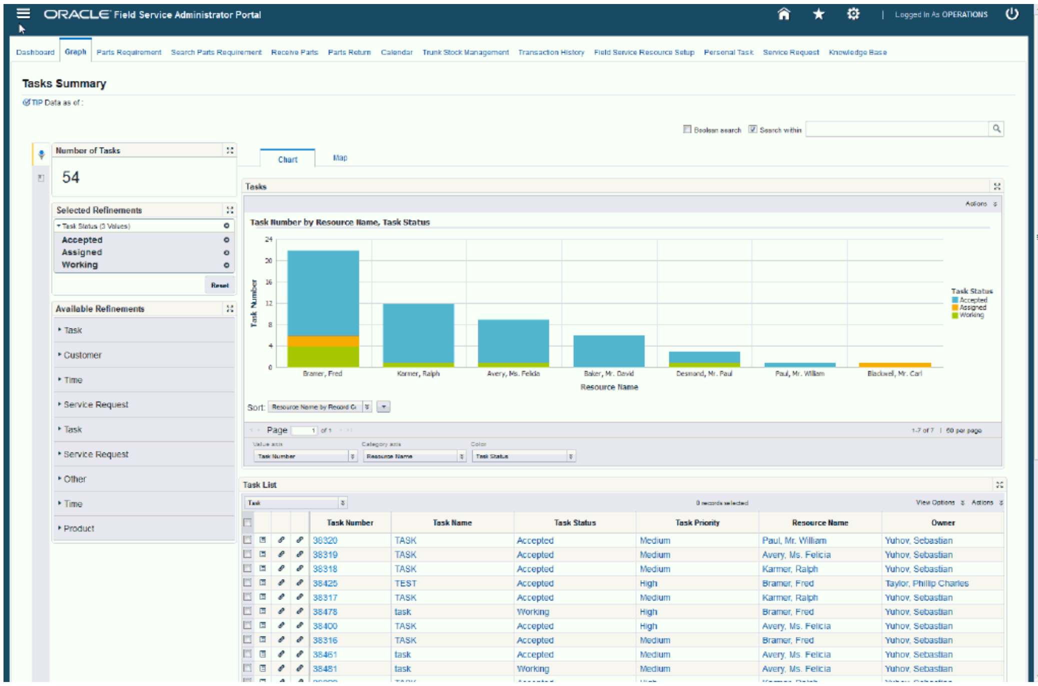
Region	Components
	• Resource Name • Task Priority • Task Status • Task Type • Problem Code • Year • Year-Month • Month • Week • Day of Week
Debrief Lines (results table)	Column Sets: • Debrief • Task • Customer • Time

Field Service Information Discovery Plus Administrator Portal

Field Service Administrators can use this dashboard to analyze data related to Service Requests, Tasks, and Technicians. The following is a partial display of the Field Service Administrator Portal page.

From the Field Service Administrator Portal responsibility, navigate to the Field Service Administrator Portal page:

(N) Field Service Administrator Portal > Dashboard > Graph (T)



Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Region	Components
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Task • Customer • Time • Service Request • Task • Service Request • Other • Time • Product
Summarization Bar **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning - Grey: Normal - Green: Good	• Number of Tasks

Region	Components

Chart (tabbed component container)
 	
Tasks
	Task Number by Resource Name, Task Status (chart)
	
	• Sort Options
	  • Resource Name
	  • Resource Name by Record Count
	• Metric (value axis)
	  • Task Number
	  • Planned Effort (Minutes) (sum), Scheduled Travel Duration (Minutes) (sum)
	  • Actual Effort (Minutes) (sum), Actual Travel Duration (Minutes) (sum)
	• Dimensions (category axis)
	  • Resource Name
	  • Customer Name
	  • Country
	  • State
	  • City
	  • Year
	  • Year-Month
	  • Month
	  • Week
	  • Owner
	  • Started on Time

Region	Components
	- Finished on Time - Problem Code - Task Priority - Task Status - Task Type • Series Dimensions (color) - (none) - Task Status - Task Priority - Task Type - Customer Name - Country - State - City - Year - Year-Month - Month - Week - Day of Week - Started on Time - Finished on Time

Region	Components
	• Problem Code
Task List (Results Table)	Column Sets: • Task • Service Request • Time

Oracle Field Service Information Discovery Plus Product Configuration

Setting Up Oracle Field Service Information Discovery Plus

The Oracle Field Service product configuration setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Field Service Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 12-41 by assigning UMX roles and updating access grants.

2. Schedule Setup for Full Endeca Upload or Refresh, page 12-42.

3. Load data to the Oracle Field Service Data Domain, page 12-43 by running graphs provided by Oracle Field Service.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Field Service

As part of the Oracle E-Business Suite Information Discovery integration for the Oracle Field Service application, the following UMX Roles are provided:

UMX Role	Internal Code Name
Field Service Endeca Access Role	UMX|CSF_ENDECA_ACCESS_ROLE
Field Service Endeca Admin Portal Access Role	UMX|CSF_ENDECA_ADMIN_PO_ACCESS_ROLE
Field Service Endeca Global Access Role	UMX|CSF_ENDECA_GLOBAL_ACCESS_ROLE

You must add the new UMX role 'Field Service Endeca Access Role' (Internal Code Name: UMX|CSF_ENDECA_ACCESS_ROLE) to enable Endeca menu items for the Field Service Manager responsibility, or any other custom responsibility which is using the same menu. When this UMX role is assigned to the Field Service Manager responsibility, the menu items 'Field Service Tasks Summary' and 'Field Service Parts Summary' appear.

To obtain access to the Field Service Admin Portal, you must add the new UMX role 'Field Service Endeca Admin Portal Access Role' (Internal Code Name: UMX|CSF_ENDECA_ADMIN_PO_ACCESS_ROLE) to the 'Field Service Administrator Portal' responsibility.

If a user requires access to the complete (global) dataset, the 'Field Service Endeca Global Access Role' (Internal Code Name: UMX|CSF_ENDECA_GLOBAL_ACCESS_ROLE) must be added for that user. If a user does not have global access to the dataset, that user will have access to task, debrief, and parts order information related to resources belonging to his/hers group or territory only.

For assigning UMX roles and grants, refer to *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Scheduling Setup for Full Endeca Upload or Refresh

The following data domains are included with the Oracle Field Service application:

Data Domain Name	Purpose
csf-tasks	Domain Service Request, Task, and Resource (Technician) information.
csf-parts	Stores Parts Order and Task Debrief information.

Each data domain comes with a set of graphs. The naming of the graphs is identical across data stores.

The initial data upload for Endeca Field Service is complete when the Full graph is run as described in the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental data load or refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.

7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Start a graph from the Task Type list.

12. Select the graph for schedule to run. I.e. FullLoadConfig.grf/IncrementalLoadConfig.grf.

13. Click Create to set the scheduler.

ETL Parameters for Oracle Field Service

You can load data to the Oracle Field Service Data Domain by running graphs provided by Oracle Field Service.

To load data to the Oracle Field Service data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under csf-parts.

2. Graphs to load data include:

   - **FullLoadConfig.grf**: This graph loads meta data and data from all views. It resets all records in the csf-parts data domain, and then loads data. Run this graph to load data for the Field Service Parts Summary page. This graph will load data for part orders and debrief.

   - **IncrementalLoadConfig.grf**: This graph performs incremental load for part orders and debrief. Only those records that were updated subsequent to the last load are loaded. Note: Data deleted in EBS (Field Service) will not be removed from Endeca by running Incremental Graph. You must run FullLoadConfig.grf graph to remove all the data from Endeca and then reload all data. Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system.

Views and Joins for Oracle Field Service Information Discovery Plus

The following views are used by the ETL layer in Endeca to load Oracle Field Service data to the Endeca data domain:

View Name	Purpose
CSF_EID_TASKS_V	Loads Service Request, Task and Resources (Technician) data
CSF_EID_PARTS_V	Loads Parts Orders and Task Debrief data

Menus for Oracle Field Service Information Discovery Plus

Oracle Field Service Information Discovery Plus integration includes the following new user menu functions:

User Function Name	Function Name
Oracle Field Service Parts Destination	CSP_ENDECA_PARTS
Oracle Field Service Parts Landing Page	CSP_ENDECA_PARTS_LANDING_PG
Oracle Field Service Tasks Destination	CSF_ENDECA_TASKS
Oracle Field Service Tasks Landing Page	CSF_ENDECA_TASKS_LANDING_PG
Oracle Field Admin Portal Destination	CSF_ENDECA_AP
Oracle Field Service Admin Portal Landing Page	CSF_ENDECA_AP_LANDING_PG

13

Oracle Financials Information Discovery Plus: Payables

This chapter covers the following topics:

Overview

You can use Oracle Financials Information Discovery Plus for Payables to quickly search and filter transaction details across organizations and related entities.

Using the payables pages, you can review and analyze data using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using payables pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS. In Oracle Payables, the following pages enable search functions using Endeca Information Discovery Integration:

- **Supplier Balance Page:** The Supplier Balance Page enables a payables manager to utilize several different features and functionality to access pertinent payables information quickly. For example, the manager can view which supplier has highest invoice amount due along with the due date; and once that information is identified, can then take an action on that invoice for example pay up that specific invoice. In addition this page also lists the recently paid invoices. With this the manager will be able to quickly look at the details of invoices which were recently paid and track necessary information as required.

- **Holds Page:** The Holds page, provides the payables manager the ability to view payables invoices which are currently on hold due to several reasons. Based on the information available, the manager can easily view the problematic invoices and act upon those invoices by resolving the issues that resulted in holding of the invoice; the action may also involve resolving potential dispute with the supplier. Once the invoice gets released from the hold, it can be paid. The Holds page is designed to show both PO matched and non-PO invoices.

- **Discounts Opportunity Page:** The Discounts Opportunity page, provides the payables manager the ability to view payables invoices along with the discounts that can be availed on these invoices. The discount available information includes a breakdown of the discount amounts by invoices as well as by discount expiration dates etc. Based on the information available, the manager can maximize discounts by managing the timing of invoice payments.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Financials Information Discovery Plus: Payables application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

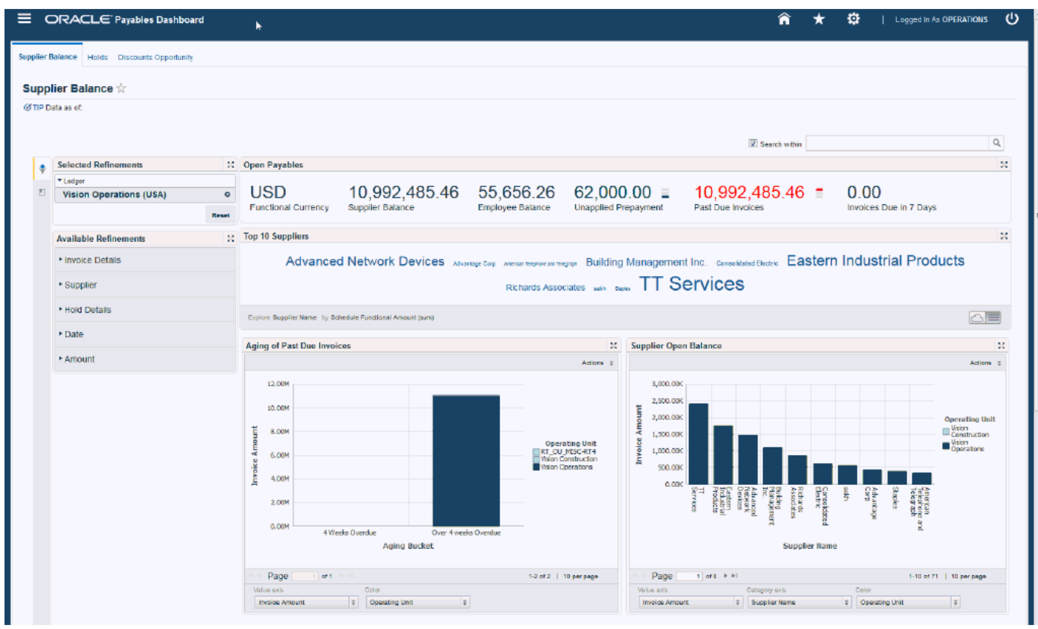
Oracle Financials Information Discovery Plus: Payables User Interfaces

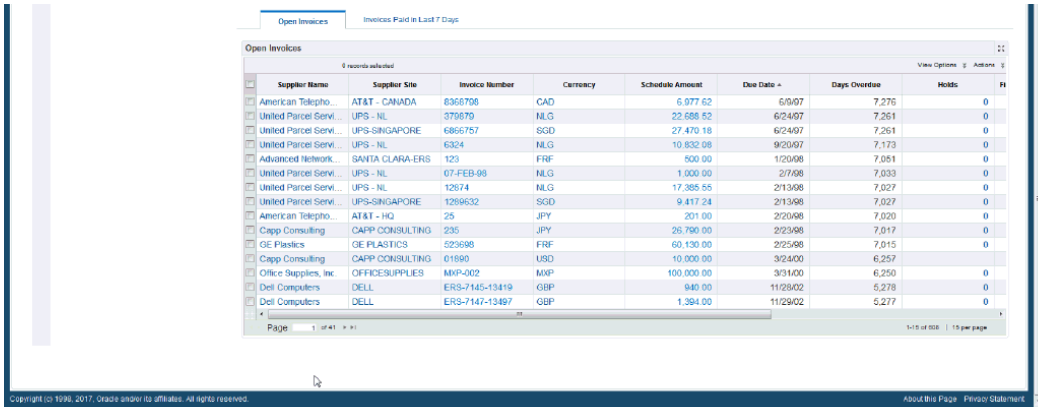
Supplier Balance Page

The Supplier Balance Page enables a payables manager to utilize several different features and functionality to access payables information quickly. For example, the manager can view which supplier has highest invoice amount due along with the due date; and once that information is identified, can then take an action on that invoice for example pay up that specific invoice. In addition this page also lists the recently paid invoices. The payables manager can quickly view details of recently paid invoices and track information as required. The following describes the Endeca Supplier Balance page regions and components:

From the Payables responsibility, navigate to the Supplier Balance page:

(N) Payables Dashboard > Supplier Balance





Region	Components
Sub Tabs (page links)	• **Supplier Balance** - Select this sub-tab to navigate to the Supplier Balance page. • **Holds** - Select this sub-tab to navigate to the Holds page. • **Discounts Opportunity** - Select this sub-tab to navigate to the Discounts Opportunity page.
Advanced Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.

Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Ledger • Invoice Details • Supplier • Hold Details • Date • Amount

Region	Components
Open Payables (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: • Red: Critical Warning State • Yellow: Warning state • Green: Good	**Open Payables** - Use this to monitor the health of payables open transactions. These metrics are based on the filters applied for the report. However in the default view as there will be no filters applied the information displayed will be based on the data which you can access. Following metrics are displayed for this report: • **Functional Currency:** The currency of the selected ledger (primary filter) • **Supplier Balance:** Sums all invoices in ledger currency which are unpaid or partially paid invoices. This displays all invoice types except for Expense Reports and Prepayments. Only unpaid prepayment invoices are included. Amount displays in ledger currency and the conversion of foreign currency invoices uses the invoice exchange rate. • **Employee Balance:** Sums all invoices of Expense Reports type that are unpaid. Amount displays in ledger currency and the conversion of foreign currency invoices uses the invoice exchange rate. • **Unapplied Prepayment:** Sums all prepayment invoices that are available and are not fully applied. Amount displays in ledger currency and the conversion of foreign currency invoices uses the invoice exchange rate. • **Past Due Invoices:** Displays the sum of all overdue invoices. Amount displays in ledger currency and the conversion of foreign currency invoices uses the invoice exchange rate. • **Invoices Due in 7 Days**: Displays the sum of all invoices due within the next 7 days. Amount displays in ledger currency and the conversion of foreign currency

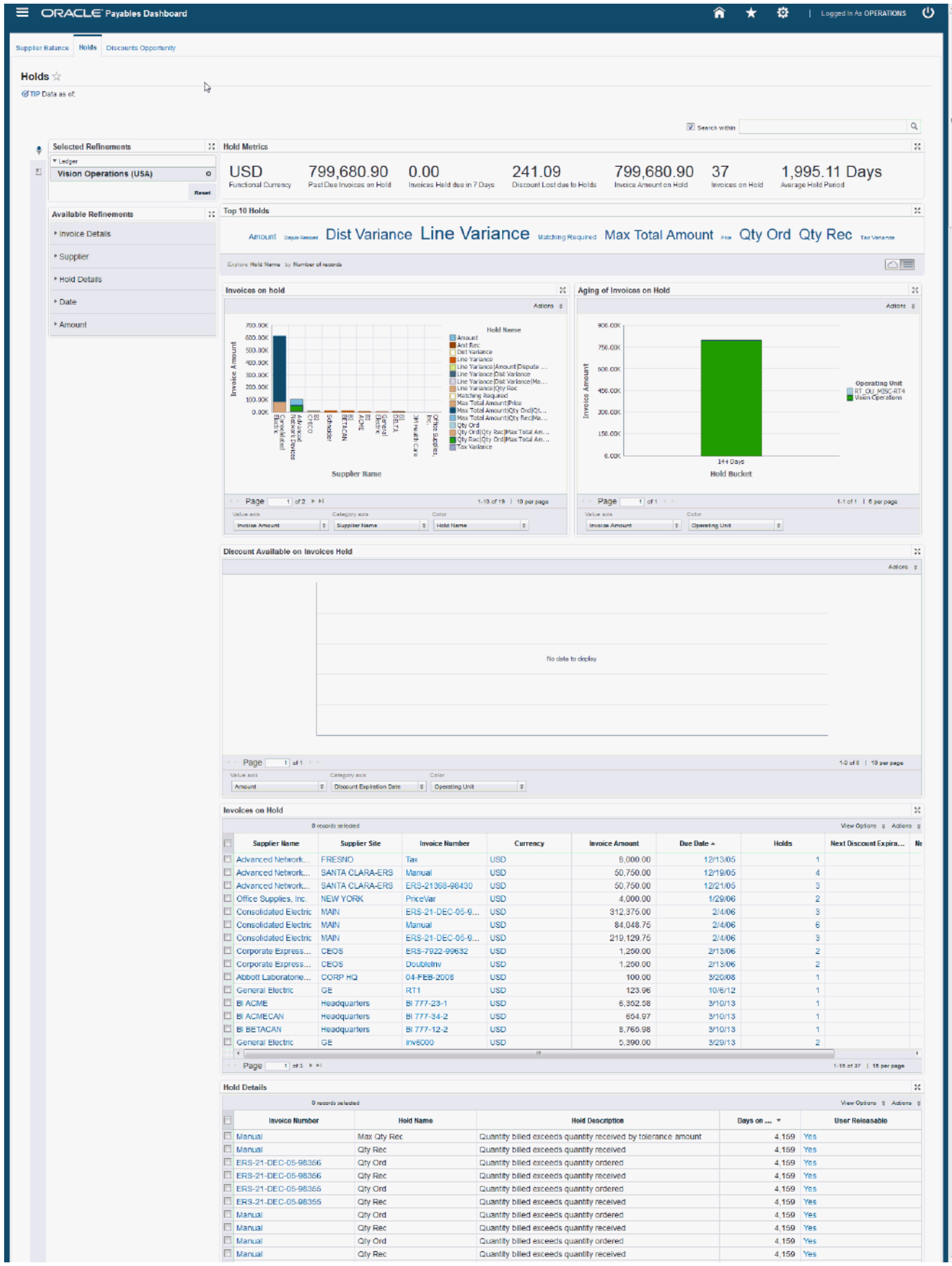
Region	Components
	invoices uses the invoice exchange rate.
Top 10 Suppliers	**Top 10 Suppliers** - Displays details of the top 10 suppliers. The ranking is based on the frequency of operations with the supplier
Charts and Graphs	**Aging of Past Due Invoices:** The resulting data, based on applicable filters, is displayed according to the aging template selected. The x-axis represents the aging periods for open invoices according to the template set in the profile option and the y-axis represents Unpaid Invoice Amount / Invoice Count. The invoice amount displays ledger currency and the conversion uses the exchange rate available on the invoice. **Supplier Open Balance:** The resulting data, based on applicable filters, displays party wise. The x-axis represents the LE/BU/Supplier/Currency and the y-axis represents Unpaid Invoice Amount / Invoice Count. The invoice amount displays ledger currency and the conversion uses the exchange rate available on the invoice.
Results Tables	**Open Invoices:** Displays results based on filters applied on various dimensions. Results display in column format and display schedules of all unpaid or partially paid invoices that are accessible to you (OU security). **Invoices Paid in Last 7 Days:** Displays results based on filters applied on various dimensions. Results display in a column format and display schedules of invoices paid in the last 7 days.

Holds Page

The Holds page provides the payables manager the ability to view payables invoices which are currently on hold due to several reasons. Based on the information available, the manager can easily view the problematic invoices and act upon those invoices by resolving the issues that resulted in holding of the invoice; the action may also involve resolving potential disputes with the supplier. Once the invoice is released from the hold, it can be paid. The Holds page is designed to show both PO matched and non-PO matched invoices. The following describes the Endeca Holds page regions and components:

From the Payables responsibility, navigate to the Holds page:

(N) Payables Dashboard > Holds


ORACLE Payables Dashboard
Supplier Balance
Holds
Discounts Opportunity
Holds
Selected Refinements
Vision Operations (USA)
Available Refinements
Invoice Details
Supplier
Hold Details
Date
Amount
Hold Metrics
USD
799,680.90
0.00
241.09
799,680.90
37
1,995.11 Days
Top 10 Holds
Amount
Dist Variance
Line Variance
Max Total Amount
Qty Ord
Qty Rec
Invoices on hold
Supplier Name
Aging of Invoices on Hold
Hold Bucket
Discount Available on Invoices Held
No data to display
Invoices on Hold
Hold Details

Region	Components
Sub Tabs (page links)	• **Supplier Balance** - Select this sub-tab to navigate to the Supplier Balance page. • **Holds** - Select this sub-tab to navigate to the Holds page. • **Discounts Opportunity** - Select this sub-tab to navigate to the Discounts Opportunity page.
Advanced Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Ledger • Invoice Details • Supplier • Hold Details • Date • Amount

Region	Components
Hold Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: • Red: Critical warning state • Yellow: Warning state • Green: Good	**Hold Metrics** • **Functional Currency**: Currency of the selected ledger (primary filter) • **Past Due Invoices on Hold:** Amount of invoices on hold with past due date. • **Invoices Held due in 7 Days**: Amount of invoices on hold and due in the next 7 days. • **Discount Lost due to Holds:** Discount amount available on invoices on hold and missing at least one discount date. • **Invoice Amount on Hold:** Sum of all invoices on hold (not payment hold). Amount displays in selected ledger currency and the conversion of foreign currency invoices uses the invoice exchange rate. • **Invoices on Hold:** Count of the invoices on hold. • **Average Hold Period:** Derived as Sysdate - Hold date for all pending holds / count of invoices on hold.
Top 10 Holds (tag cloud component)	**Top 10 Holds Tag Cloud:** - Displays details of the top 10 hold reasons. The ranking is based on the frequency that a hold is applied, either manually or by the application. The analysis is based on the display filters. However, the default view applies no filters and the analysis covers the entire data set. The tag cloud displays the hold name and count of invoices on hold. When you select any hold name, the hold is added as a filter and data is refreshed.

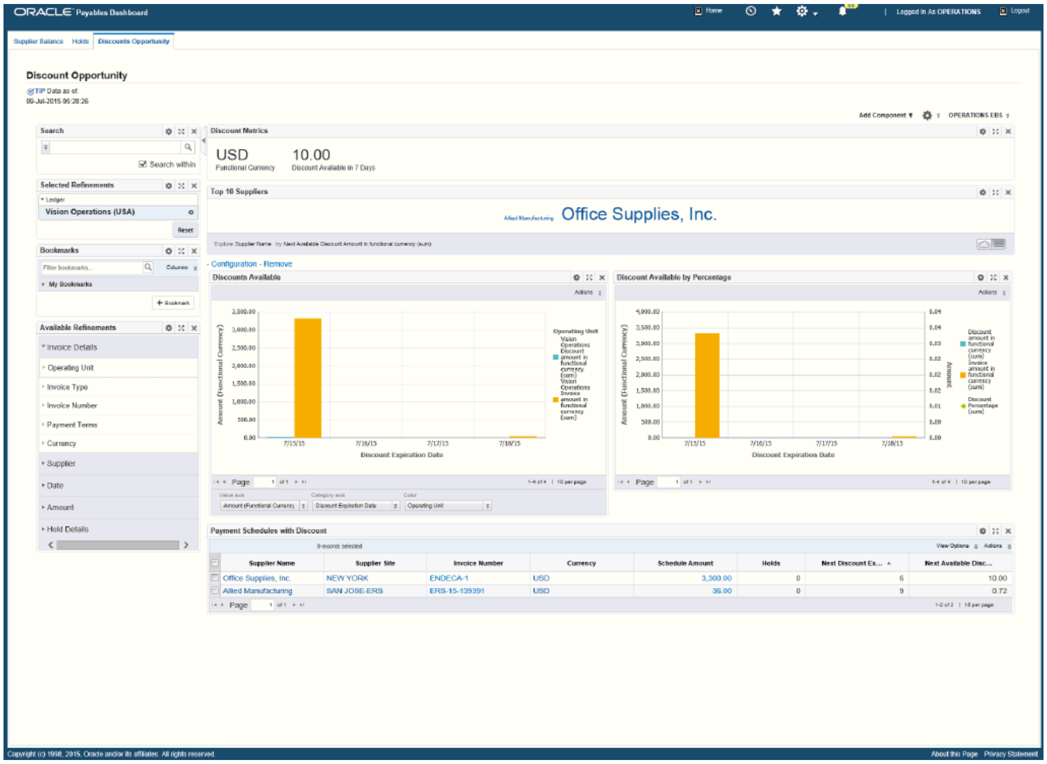
Region	Components
Charts and Graphs	**Invoices on Hold:** The data is based on the filters displays party wide. The x-axis represents the LE/OU/Supplier and the y-axis represents Invoice amount on Hold / Count of Invoices on Hold. The invoice amount displays in the selected ledger currency and the conversion uses the exchange rate available on the invoice. **Aging of Invoices on Hold:** The data is based on filters and displays according to the pre-seeded aging buckets. The aging is based on the period in which the invoice was on hold. The x-axis represents the aging periods for invoices which are on hold and the y-axis represents the Invoice amount on hold / count of invoices on hold. The invoice amount displays in the selected ledger currency and the conversion uses the exchange rate available on the invoice. **Discount Available on Invoices Held:** The data is based on the filters and displays according to discount or due date. This alerts you of a potential loss of discount or the possibility of slipping payments on a due date if the holds are not resolved within the next few days. The x-axis represents either Discount date or due date and the y-axis represents count of invoices on hold.
Results Tables	**Invoices on Hold:** - Displays all invoices on hold according to selected parameters. **Hold Details:** - Displays hold details.

Discounts Opportunity Page

The Discounts Opportunity page provides the payables manager the ability to view payables invoices along with the discounts that can be availed on these invoices. The discount available information includes a breakdown of the discount amounts by invoices as well as by discount expiration dates, etc. Based on the information available, the payables manager can maximize discounts by managing the timing of invoice payments. The following describes the Discounts Opportunity page regions and components:

From the Payables responsibility, navigate to the Discounts Opportunity page:

(N) Payables Dashboard > Discounts Opportunity



Region	Components
Sub Tabs (page links)	• **Supplier Balance** - Select this sub-tab to navigate to the Supplier Balance page. • **Holds** - Select this sub-tab to navigate to the Holds page. • **Discounts Opportunity** - Select this sub-tab to navigate to the Discounts Opportunity page.

Region	Components
Advanced Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Ledger • Invoice Details • Supplier • Date • Amount • Hold Details

Region	Components
Discount Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: • Red: Critical warning state • Yellow: Warning state • Green: Good	**Discount Metrics** • **Functional Currency**: The currency of the selected ledger (primary filter) • **Discount Available in 7 Days:** Displays the sum of all available discounts (either first/second/third) expiring in the next 7 days. Amount displays in the ledger currency and the conversion of foreign currency invoices uses the invoice exchange rate. • **Discount on Invoices Held:** Discount amount, presented in ledger currency, is available on invoices on hold but has the risk to be lost due to holds on invoices. Derived by summing the next available discount on invoices which are placed on hold.
Top 10 Suppliers (tag cloud component)	**Top 10 Suppliers:** Displays details of the top 10 suppliers. Ranking is based on the maximum number of discountable schedules available from each supplier's outstanding balance.

Region	Components
Charts and Graphs	**Discounts Available:** The data is a result of the selected filters and is based on the discount date. One bar represents the schedule amount and another bar represents the discount available on the scheduled amount. The x-axis represents the individual Dates/Weeks/Suppliers and the y-axis represents discount amount and the invoice amount. The amount displays the ledger currency or entered currency and the conversion uses the invoice exchange rate. **Discount Available by Percentage:** The data is a result of the selected filters and displays by discount date. The graph is a bar chart where two bars are displayed for every value of x-axis. One bar represents the schedule amount and another bar represents the discount available on the scheduled amount. The x-axis represents discount dates and the y-axis represents discount amount. The amount displays the ledger currency or entered currency, and the conversion uses invoice exchange rate. In addition, there is a trend line that displays the discount percentage for the available discounts across discount expiration dates.
Results Table	**Payment Schedules with Discount:** Displays all invoices with discount terms (based on the parameters selected).

Oracle Financials Information Discovery Plus: Payables Product Configuration

Setting Up Oracle Financials Information Discovery Plus: Payables

The Oracle Payables application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

You must complete the following steps to set up Oracle Financials Information Discovery Plus for Payables:

1. Set Access Control, page 13-18, by assigning UMX roles and updating access grants.
2. Set Profile Options, page 13-22.
3. Run the full load graph, page 13-20, in the Clover server to import all transaction and dispute data.
4. Schedule Setup, page 13-20, in the Clover server to run incremental load graphs.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Payables

As part of the Oracle E-Business Suite-EID integration for the Oracle Payables application, the following UMX Roles are provided:

UMX Role	Internal Code Name
Payables Endeca Access Role	UMX|AP_ENDECA_ACCESS_ROLE

You must add the new UMX role Payables Endeca Access Role (Internal Code Name: UMX|AP_ENDECA_ACCESS_ROLE) for the Payables Manager responsibility to enable the Endeca menus.

If you want to use the Endeca-related roles with more than one responsibility, then you must have additional grants with a security context corresponding to each responsibility. You can add grants for a given role as a separate process instead of while you are adding the role to the responsibility.

Payables includes the following Permission Sets, Grants, and Responsibilities.

Permission Sets

- **Permission Set Name:** Payables Endeca Access Permission Set
- **Code:** AP_ENDECA_ACCESS_PS
- **Permissions Included in the Set:**
  - Discount Opportunity (EID)
  - Payables Discounts Page
  - Supplier Balance (EID)
  - Payables Supplier Balance Page
  - Holds Management (EID)
  - Payables Holds Page
  - Payments Schedule Validation

Grants

- **Grant Name:** AP Endeca Access Grant
- **Grantee Type:** All Users
- **Responsibility:** select the predefined responsibility Payables Manager or a custom responsibility of your choice
- **Permission Set Name:** Payables Endeca Access Permission Set

Responsibilities

- Payables Manager
- Any custom responsibility

Enabling Financials Information Discovery Plus: Payables Menus in Oracle E-Business Suite (EBS)

1. Assign a UMX Role to the Responsibility
2. Add the Payables Endeca Access Role to the predefined Payables Manager responsibility or to any custom payables responsibility. Update the Grant AP

Endeca Access Grant and the Permission Set Payables Endeca Access Permission Set.

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Loading Payables Data into the Endeca Data Domain

Clover ETL within Endeca queries payables views and completes a full data load to the payables data domain in Endeca. After the first data load, you can perform full data load, incremental data load, and daily load as required. Incremental data load updates all records in the Endeca data domain which were updated in EBS after the last load. The daily load calculates the aging bucket and discount. After the data has been loaded into the Endeca data domain, it can be loaded and displayed in the payables pages.

Payables Data Sources in the Endeca Data Domain

Data sources are defined in the payables data domain in Endeca and are used to load data for different payables extensions for Oracle Endeca pages. The parent data source is ap and includes the following:

- **ap-trx:** This data domain is used to load data for supplier balance pages.
- **ap-disc:** This data domain is used to load data for discount opportunity pages.
- **ap-hold:** This data domain is used to load hold pages.
- **ap-misc:** This data domain is used to load hold details and recent paid history.

Setting Up the Scheduler for Endeca Full and Incremental Load

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

> **Note:** No changes will be reflected in the Payables pages until incremental refresh is performed. Therefore, Oracle recommends that you schedule incremental load to perform frequent updates. These processes typically finish quickly. Full load can take time to finish and is not required once it has been implemented unless exceptions occur.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.

7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Start a graph from the Task Type list.

12. Select the graph for schedule to run. i.e. FullLoadConfig.grf or IncrementalLoadConfig.grf.

13. Click Create to set the scheduler.

ETL Parameters for Payables

You can load data to the payables data domain by running the full load and incremental load graphs provided by payables.

To load data to the Payables data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under ap.

2. Graphs to load data include:

   - **FullLoadConfig.grf**: This graph deletes all existing data, initializes the data domain, and loads all data to the payables data domain.

   - **IncrementalLoadConfig.grf**: This graph loads updated and new data, and deletes closed or incomplete records since last full load or incremental load was processed. The Purpose of this graph is to synchronize the Endeca data domain with the database. Oracle recommends that you run this graph frequently (every few minutes), depending on your business requirements.

Profile Options for Payables

You must set the following profile option:

Profile Option Name	Description
AP: Endeca Aging Template	This profile option (AP_EID_AGING_TEMPLATE) set at the site level enables you to set your own aging template for Endeca reports. The profile option displays a list of all the aging templates defined in payables which are active. You can select any one template for use. **Important:** If this profile is not set, then Full Load Graph cannot run for payables during the Endeca installation and configuration process.

Views and Joins for Payables

The following views are used by the ETL layer in Endeca to load payables data to the Endeca data domain:

View Name	Purpose
AP_EID_INSTALLMENT_V	Fetches installment data from the AP payment schedule and other reference tables. It queries attributes of invoices, installment, hold, supplier, and so on.
AP_EID_HOLD_V	Fetches hold details data from the AP holds which are not released.
AP_EID_PAID_HISTORY_V	Fetches recent payments from the invoice payments & AP checks tables.

View Name	Purpose
AP_EID_PREPAYMENT_V	Fetches the paid prepayments.

Menus and Functions for Payables

Payables integration includes the following new user menu and responsibilities functions:

Functions

User Function Name	Function Name
Discount Opportunity(EID)	AP_ENDECA_DISCOUNT_HOME
Discount Opportunity	AP_ENDECA_DISCOUNTS
Supplier Balance(EID)	AP_ENDECA_BALANCE_HOME
Supplier Balance	AP_ENDECA_SUPP_BALANCE
Holds Management(EID)	AP_ENDECA_HOLD_HOME
Holds Management	AP_ENDECA_HOLDS
Payments Schedule Validation	AP_ENDECA_VALIDATION

Menus

Menu Name	Menu Code	Function Name
Payables EID Dashboard	AP_ENDECA_EID_MENU	Holds Management(EID)
Payables EID Dashboard	AP_ENDECA_EID_MENU	Discounts Opportunity(EID)
Payables EID Dashboard	AP_ENDECA_EID_MENU	Supplier Balance(EID)
Payables Dashboard Prompt - Holds Management	AP_ENDECA_MENU	Holds Management

Menu Name	Menu Code	Function Name
Payables Dashboard Prompt - Discounts Opportunity	AP_ENDECA_MENU	Discounts Opportunity
Payables Dashboard Prompt - Supplier Balance	AP_ENDECA_MENU	Supplier Balance
Payables Dashboard	AP_ENDECA_MENU	Payments Schedule Validation
Payables Dashboard	AP_ENDECA_MENU Sub Menu - Payables EID Dashboard	

14

Oracle Financials Information Discovery Plus: Receivables

This chapter covers the following topics:

- Overview
- Outstanding Receivables Overview Pages
- Disputes Overview Page
- Outstanding Receivables Overview Page
- Billing Process Overview Page
- Payment Process Overview page
- Payment History Page
- Setting Up Oracle Receivables
- Setup and Configuration Steps
- Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Receivables
- Loading Receivables Data into the Endeca Data Domain
- Setting Up the Scheduler for Endeca Full and Incremental Load
- ETL Parameters for Receivables
- Profile Options for Receivables
- Views and Joins for Receivables
- Menus for Endeca Receivables

Overview

You can use Oracle Financials Information Discovery Plus for Receivables to quickly search and filter receivables transaction details across organizations and related entities.

Using the Receivables pages, you can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using Receivables pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS. In Oracle Receivables, the following pages enable search functions using Endeca Information Discovery integration:

- **Outstanding Receivables Overview**: The Outstanding Receivables Overview pages provide an overview of open receivables transactions and associated key metrics. There are two Outstanding Receivables Overview pages:
  - Outstanding Receivables Overview page (internal)
  - Outstanding Receivables Overview page (external)

  You can filter and view the individual transaction details, and take appropriate actions on an individual transaction or across multiple transactions, such as Pay, Print, or Initiate Dispute.

- **Disputes Overview**: The Disputes Overview page lets you analyze disputes flow within the organization, identify specific dispute reasons that require attention and further investigation, and identify those customers abusing the disputes mechanism to delay payments. The Disputes Overview page also allows users easy access to a specific dispute to investigate and possibly cancel it.

- **Outstanding Receivables Overview**: This third Outstanding Receivables Overview page also provides an overview of open receivables transactions and associated key metrics. This page targets the requirements of receivables personnel for identifying potential outstanding receivables issues. You can narrow and analyze individual receivables transactions to initiate appropriate action.

- **Billing Process Overview**: The Billing Process Overview page allows receivables personnel to analyze and process billing transactions. This page displays potential issues that require attention in the billing process, such as incomplete transactions, adjustments pending approval, and import errors.

- **Payment Process Overview**: The Payment Process Overview page provides an overview of payment processes, transactions, and associated key metrics. This page targets the requirements of receivables personnel responsible for streamlining the processing of payment-related transactions, and provides information on items that require attention for ensuring smooth processing of receipt and remittance batches, unapplied receipts, and resolution of lockbox errors.

- **Payment History**: The Payment History page provides an overview of paid transactions and payments, and associated key metrics. This page targets the requirements of receivables personnel and provides insight into recent historical payment patterns across customers and operating units.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Receivables Extensions for the Oracle Endeca application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

Oracle Financials Information Discovery Plus: Receivables User Interfaces

Outstanding Receivables Overview Pages

The Outstanding Receivables Overview pages provide an overview of open receivables transactions and associated key metrics. There are two Outstanding Receivables Overview pages:

- Outstanding Receivables Overview page (internal): addresses the needs of internal users that may include collections personnel, account managers, sales support, and so on.

- Outstanding Receivables Overview page (external): addresses the needs of external customers requiring easy access to individual transactions and to take specific action.

The structure of the two pages is nearly the same, however, there is a difference in the list of attributes available to support Guided Navigation, Key Metrics and related Graphs, as well as the transaction details displayed in the transactions list and details regions. The differences address specific business needs of users, and allow them to efficiently perform analysis and related tasks.

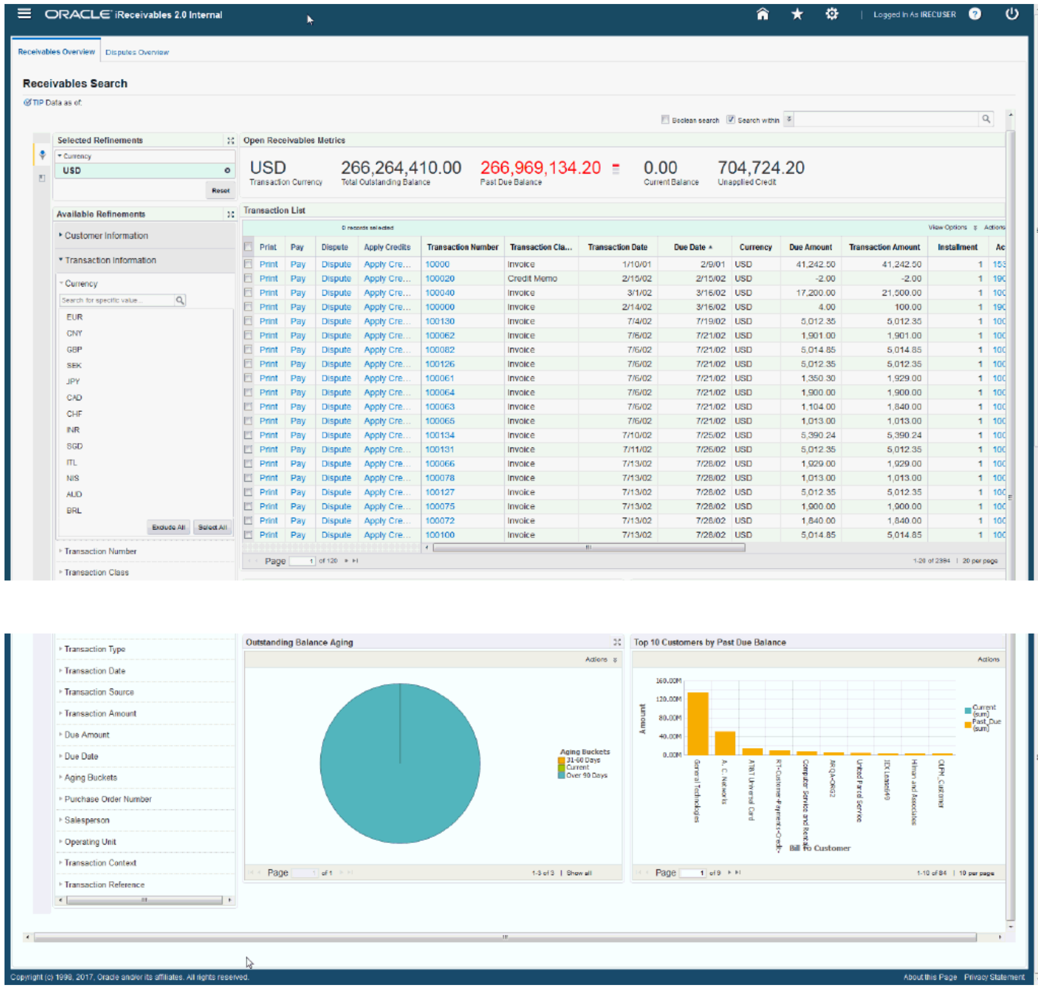
You can perform specific actions directly from the Outstanding Receivables Overview pages, or navigate to the core iReceivables application to perform further investigation prior to taking necessary actions. This is available from action icons and links associated with a specific transaction in the transactions list table, actions menu items applicable across multiple selected transactions, or through links associated with individual transaction attributes. The following describes the Outstanding Receivables Overview pages.

Within the Outstanding Receivables Overview page, you can view and analyze problem areas in respect to outstanding receivables using display tools that include metrics, charts, graphs, and tables. The following describes the Endeca Outstanding Receivables Overview page regions and components:

Outstanding Receivables Overview Page (internal)

From the iReceivables responsibility, navigate to the Outstanding Receivables Overview (internal) page:

(N) iReceivables 2.0 Internal > Outstanding Receivables Overview



Within the Outstanding Receivables Overview page, you can view and analyze problem areas in respect to outstanding receivables using display tools that include metrics, charts, graphs, and tables. The following describes the Endeca Outstanding Receivables Overview page regions and components:

Region	Components
Alerts	Alerts bring attention to specific accounts or subsets of transactions that require immediate attention. You can customize alerts based on your business requirements.

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Customer Information Attributes
	  • Account Number
	  • Bill-to Customer
	  • Bill-to Location
	  • Ship-to Customer
	  • Ship-to Location
	  • Collector
	  • Profile Class
	• Transaction Information Attributes
	  • Currency
	  • Transaction Number
	  • Transaction Class
	  • Transaction Type
	  • Transaction Date
	  • Transaction Source
	  • Transaction Amount
	  • Due Amount
	  • Due Date
	  • Aging Buckets

Region	Components
	- Purchase Order Number - Sales Order Number - Salesperson - Operating Unit - Transaction Context - Transaction Reference • Transaction Information (Descriptive Flexfield Attributes) - Context Value **Important:** If you enable or update Descriptive Flex Field (DFF) functionality, then you must run Full Load to import all receivables data into the Endeca Data Domain.

Region	Components
Open Receivables Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning state - Green: Good	• **Transaction Currency** Either value of currency attribute selected or 'Multiple' if either no currency or multiple currencies are selected by the user. • **Total Outstanding Balance** Sum of all open Debit transactions (Transaction amount - Payment and Credits - Adjusted amount) - Sum of all open Credit transactions amount. • **Past Due Balance** Sum of all debit transactions Due amount where the Due Date < System Date. • **Current Balance** Sum of all debit transactions Due amount where the Due Date >= System Date • **Unapplied Credit** Sum of all credit transactions amount, independent of Due Date value

Region	Components

Transaction List (results table)	Transaction List (results table)
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Export to Microsoft Excel
	  • Print
	  • Pay
	  • Dispute
	  • Apply Credits
	Note: You can apply credits by selecting individual or multiple transactions and the 'Apply Credits' link to navigate to the Apply Credits Flow page:
	1. From the Endeca Receivables Overview page, select individual or multiple transactions from the Transactions List results table and then click the Apply Credits link in the Apply Credits column, or from the Actions menu. The Apply Credits flow page appears.
	2. Confirm that the transaction(s) selected appear in the Apply Credits flow page. Select transactions and click Next to continue applying credits, or Cancel to return to the Endeca

Region	Components

	Receivables Overview page.
	3. Applying credits is not supported when multi customer and currency transactions are selected.
	
	• Column Sets
	  • Transaction Number
	  • Transaction Class
	  • Transaction Date
	  • Due Date
	  • Currency
	  • Due Amount
	  • Transaction Amount
	  • Installment
	  • Account Number
	  • Bill-to Customer
	  • Bill-to Location
	  • Purchase Order Number
	  • Operating Unit

Region	Components

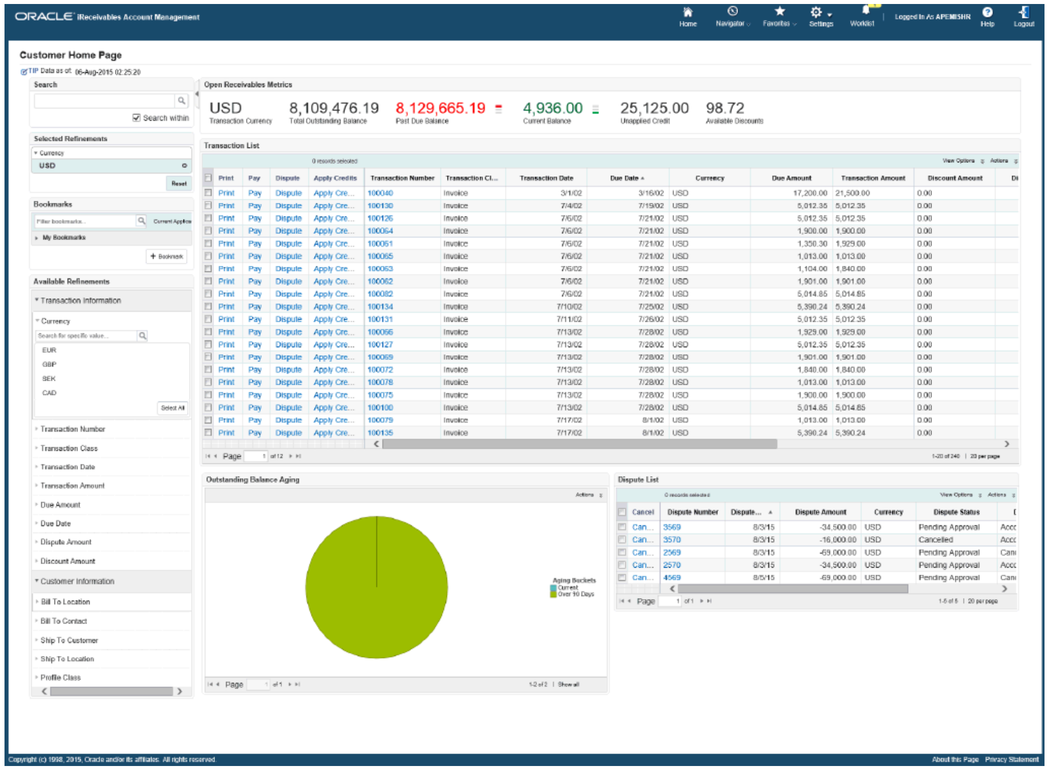
Graphs	Outstanding Balance Aging (pie chart)
	
	Top 10 Customers by Past Due Balance (bar chart)
	• Sort Options
	    • Bill-to Customers
	    • Bill-to Customers by Past Due (sum)
	    • Bill-to Customers by Current (sum)

Outstanding Receivables Overview Page (external)

The Outstanding Receivables Overview Page (external) targets the requirements of external customers who are either responsible for reconciling their account receivables balance, or need easy access to individual transactions to take specific action. The following is a display of the Outstanding Receivables Overview (external) page.

From the iReceivables Account Management responsibility, navigate to the Outstanding Receivables Overview (external) page:

(N) iReceivables Account Management > Outstanding Receivables Overview



Within the Outstanding Receivables Overview page, you can view and analyze problem areas in respect to outstanding receivables using display tools that include metrics, charts, graphs, and tables. The following describes the Endeca Outstanding Receivables Overview (external) page regions and components:

Region	Components
Alerts	Alerts bring attention to specific accounts or subsets of transactions that require immediate attention. You can customize alerts based on your business requirements.

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Transaction Information Attributes • Customer Information Attributes • Transaction Information (Descriptive Flexfield Attributes) • Context Value **Important:** If you enable or update Descriptive Flex Field (DFF) functionality, then you must run Full Load to import all receivables data into the Endeca Data Domain.

Region	Components
Open Receivables Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning state - Green: Good	• **Transaction Currency** Either value of currency attribute selected or 'Multiple' if either no currency or multiple currencies are selected by the user. • **Total Outstanding Balance** Sum of all open Debit transactions (Transaction amount - Payment and Credits - Adjusted amount) - Sum of all open Credit transactions amount. • **Past Due Balance** Sum of all debit transactions Due amount where the Due Date < System Date. • **Current Balance** Sum of all debit transactions Due amount where the Due Date >= System Date • **Unapplied Credit** Sum of all credit transactions amount, independent of Due Date value • **Available Discounts** Sum of all early payment discount amounts available

Region	Components

Transaction List (results table)	Transaction List (results table)
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Export to Microsoft Excel
	  • Print
	  • Pay
	  • Dispute
	  • Apply Credits
	Note: You can apply credits by selecting individual or multiple transactions and the 'Apply Credits' link to navigate to the page:
	1. From the Endeca Receivables Overview page, select individual or multiple transactions from the Transactions List results table and then click the Apply Credits link in the Apply Credits column, or from the Actions menu. The Apply Credits flow page appears.
	2. Confirm that the transaction(s) selected appear in the page. Select transactions and click Next to continue applying credits, or Cancel to return to the Endeca Receivables Overview page.

Region	Components

	3. Applying credits is not supported when multi customer and currency transactions are selected.
	
	• Columns
	  • Print (link to print output)
	  • Pay (link to Invoice Payment page)
	  • Dispute (link to Dispute Description page)
	  • Apply Credits (link to Select Invoices page)
	  • Transaction Number (link to Transaction Details page)
	  • Transaction Number
	  • Transaction Class
	  • Transaction Date
	  • Due Date
	  • Currency
	  • Due Amount
	  • Transaction Amount
	  • Discount Amount
	  • Dispute Amount
	  • Purchase Order Number
	  • Account Number

Region	Components
	• Bill to Customer • Bill to Location
Graph	Outstanding Balance Aging (pie chart)

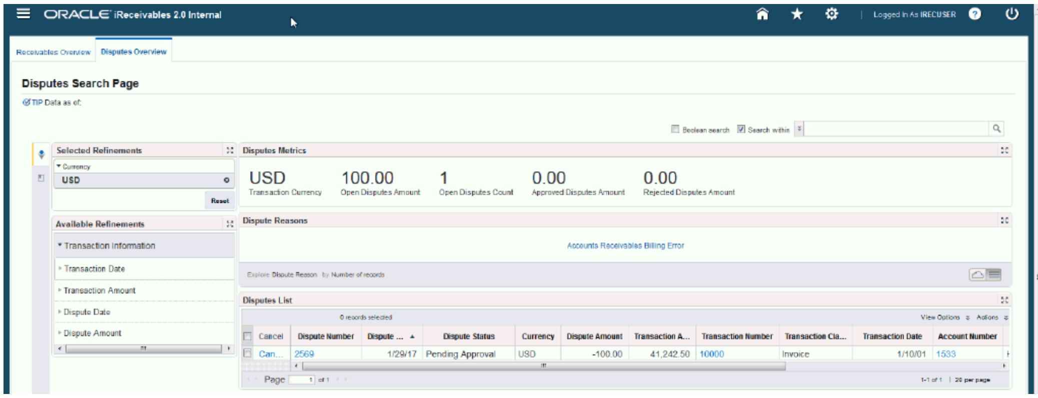
Cross Tab	Dispute List (cross tab)
	• Columns
	  • Dispute Number
	  • Dispute Date
	  • Dispute Amount
	  • Currency
	  • Dispute Status
	  • Dispute Reason
	  • Transaction Number
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Export to Microsoft Excel

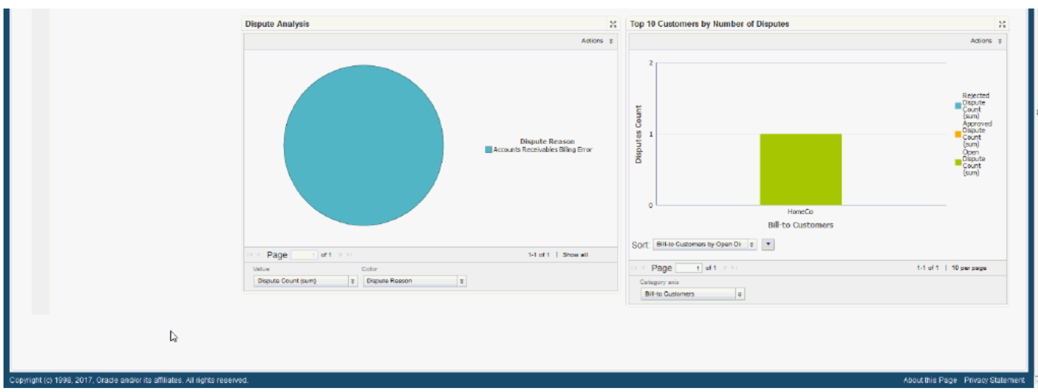
Disputes Overview Page

The Disputes Overview page enables you to analyze disputes flow within the organization, identify specific dispute reasons requiring closer attention and further investigation, and customers abusing the disputes mechanism to delay payments. You can also use the Disputes Overview page to quickly access a specific dispute to investigate and take action. The following is a display of the Disputes Overview page.

From the iReceivables responsibility, navigate to the Disputes Overview page:

(N) iReceivables 2.0 Internal > Disputes Overview





Note: If you access the Disputes Overview page and receive the warning "Unable to execute the EQL query that generates the chart data", then you can resolve this with the following steps:

1. When running the full load graph, dispute data source will be created only when a minimum of one dispute request is created within the value as defined in the profile option 'OIR: Filter Transactions Days older than'. If this profile value is null, then 365 days is the default value. Therefore, ensure that you have dispute records withiin this range.

2. You can run the following SQL query:

   select *

   FROM ra_cm_requests_all cmreq

where trunc(sysdate) - cmreq.creation_date =

Nvl(fnd_profile.value('ARI_FILTER_TRXDATE_OLDER'), 365);

If the SQL query does not return any value, then there are no dispute requests within the defined period. You must create a new dispute request for testing, run the Full load graph, and recheck the issue.

Region	Components
Alerts	Alerts bring attention to specific accounts or subsets of transactions that require immediate attention, such as recently created disputes. You can customize alerts based on your business requirements.
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Customer Information Attributes
	  • Account Number
	  • Bill-to Customer
	  • Bill-to Location
	  • Collector
	  • Profile Class
	• Transaction Information Attributes
	  • Currency
	  • Transaction Number
	  • Transaction Date
	  • Transaction Amount
	  • Dispute Number
	  • Dispute Reason
	  • Dispute Date
	  • Dispute Amount
	  • Dispute Status
	  • Dispute Requestor
	  • Sales Order
	  • Salesperson

Region	Components
	• Business Unit
Disputes Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning state - Green: Good	• **Transaction Currency** Either value of currency attribute selected or 'Multiple' if either no currency or multiple currencies are selected. • **Open Disputes Amount** Sum of all open Disputes amounts as of the System Date. • **Open Disputes Count** Total number of open Disputes as of the System Date • **Approved Disputes Amount** Sum of all Disputes amounts where Dispute Status = Approved • **Rejected Disputes Amount** Sum of all Disputes amounts where Dispute Status = Rejected
Dispute Reasons (tag cloud)	Top Ten Dispute Reasons Tag Cloud Component **Note:** The Dispute Reasons tag cloud component displays the top ten dispute reasons by frequency of occurrence.

Region	Components

Disputes List (results table)	Disputes List (results table)
	• Column Sets
	  • Cancel
	  • Dispute Number
	  • Dispute Date
	  • Dispute Status
	  • Currency
	  • Dispute Amount
	  • Transaction Amount
	  • Transaction Number
	  • Transaction Class
	  • Transaction Date
	  • Account Number
	  • Bill-to Customer
	  • Bill-to Location
	  • Operating Unit
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Export

Region	Components

Graphs Region	Dispute Analysis (chart)
	
	Note: This chart represents the overall disputes organized by dispute reason and enables you to identify potential systemic issues with the product quality, shipping channel, or any other area that results in a high number of specific disputes.
	
	• Group Dimensions (value)
	  • Dispute Count (sum)
	  • Dispute Amount (sum)
	• Series Dimensions (color)
	  • Dispute Reason
	  • Dispute Status
	
	Top 10 Customers by Number of Disputes (bar chart)
	
	Note: This chart represents the top ten customers who have the most disputes and allow the information to be partitioned by Dispute Status (insight in the relative number of approved versus rejected disputes on a per customer basis), or Dispute Reason (understanding those issues that the customer is experiencing that result in disputes initiation).
	
	• Sort Options
	  • Bill-to Customers
	  • Bill-to Customers by Open Dispute Count (sum)
	  • Bill-to Customers by Approved

Region	Components

	Dispute Count (sum)
	• Bill-to Customers by Rejected Dispute Count (sum)
	• Group Dimensions (category axis)
	  • Bill-to Customers
	  • Dispute Reason

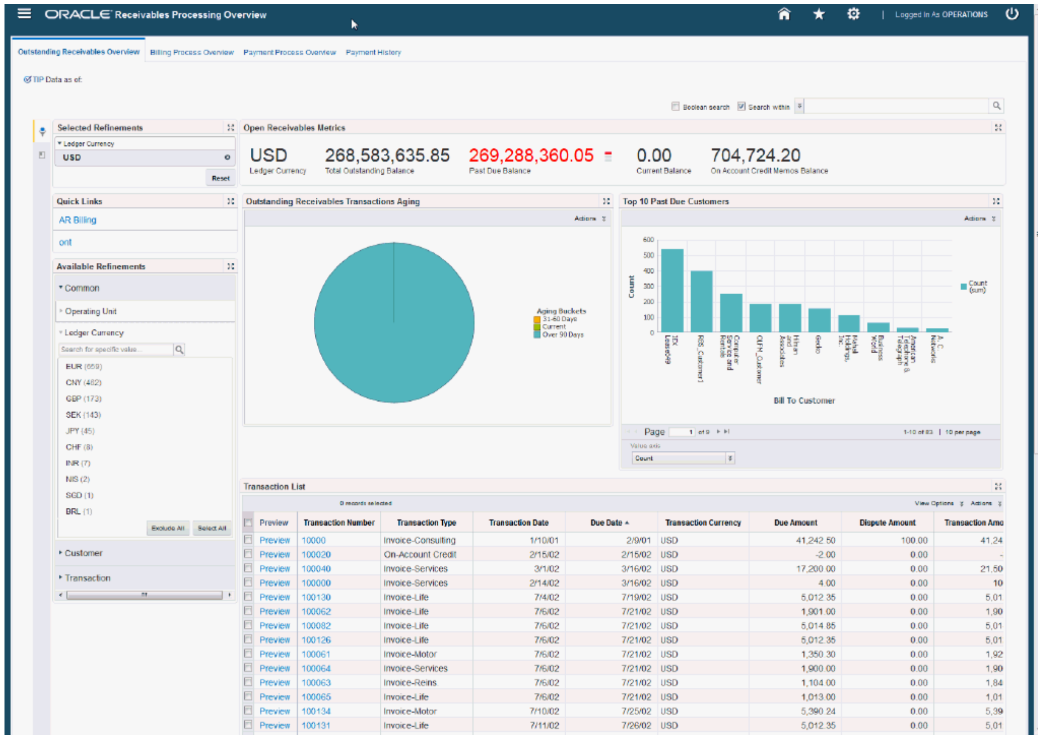
Outstanding Receivables Overview Page

The Outstanding Receivables Overview page is a third outstanding receivables overview page that provides an overview of open receivables transactions and associated key metrics. This page targets the requirements of receivables personnel for identifying potential outstanding receivables issues. You can narrow and analyze individual receivables transactions to initiate appropriate action.

You can navigate to the core Receivables Transactions window from this Outstanding Receivables Overview page to investigate and take necessary actions. Navigation is available from links associated with specific transactions in the transaction list results table. The following is a display of the Outstanding Receivables Overview page.

From the Receivables responsibility, navigate to the Outstanding Receivables Overview page:

(N) Receivables Processing Overview > Outstanding Receivables Overview



Within the Outstanding Receivables Overview page, you can view and analyze outstanding receivables problem areas using display tools that include metrics, charts, graphs, and tables. The following describes the Outstanding Receivables Overview page regions and components:

Region	Components
Alerts	Alerts bring attention to specific accounts or subsets of transactions that require immediate attention. The Outstanding Receivables Overview Alerts component highlights customers and operating units whose percent of past due receivables exceeds 40 percent. You can customize alerts based on your business requirements.

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Common Attributes
	  • Operating Unit
	  • Ledger Currency
	• Customer Attributes
	  • Account Number
	  • Bill To Customer
	  • Bill To Location
	  • Ship To Customer
	  • Ship To Location
	  • Collector
	  • Profile Class
	• Transaction
	  • Transaction Currency
	  • Transaction Number
	  • Transaction Class
	  • Transaction Type
	  • Transaction Date
	  • Transaction Source
	  • Transaction Amount

Region	Components
	- Dispute Amount - Accounted Amount - Due Accounted Amount - Due Date - Aging Buckets - Purchase Order Number - Sales Order Number - Salesperson - Transaction Reference • Transaction Information (Descriptive Flexfield Attributes) - Context Value **Important:** If you enable or update Descriptive Flex Field (DFF) functionality, then you must run Full Load to import all receivables data into the Endeca Data Domain.

Region	Components
Open Receivables Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning state - Green: Good	• **Ledger Currency** Either value of currency attribute selected or 'Multiple' if Ledger currency cannot be uniquely identified. • **Total Outstanding Balance** Sum of all open receivables transactions Due Amount (including Credit Memos). • **Past Due Balance** Sum of all debit transactions Due amount where the Due Date < System Date. • **Current Balance** Sum of all debit transactions Due amount where the Due Date >= System Date. • **On Account Credit Memos Balance** Sum of all credit transactions amount, independent of Due Date value.

Graphs	Outstanding Receivables Transactions Aging (pie chart)
	
	Note: The Outstanding Receivables Transactions Aging pie chart displays significant amounts and percentage of past due receivables and identifies systematic issues with specific customers, industries, and sectors.
	
	Top 10 Past Due Customers (bar chart)
	
	• Group Dimensions (value axis)
	  • Count
	  • Amount

Region	Components

Transaction List	Transaction List (results table)
	• Column Sets
	  • Preview
	  • Transaction Number
	  • Transaction Type
	  • Transaction Date
	  • Due Date
	  • Transaction Currency
	  • Due Amount
	  • Dispute Amount
	  • Transaction Amount
	  • Ledger Currency
	  • Due Accounted Amount
	  • Accounted Amount
	  • Account Number
	  • Bill To Customer
	  • Bill To Location
	  • Ship To Customer
	  • Purchase Order Number
	  • Operating Unit
	• View Options
	  • Hide / Show Columns

Region	Components
	- Sort - Reset table to default • Actions - Export - Compare

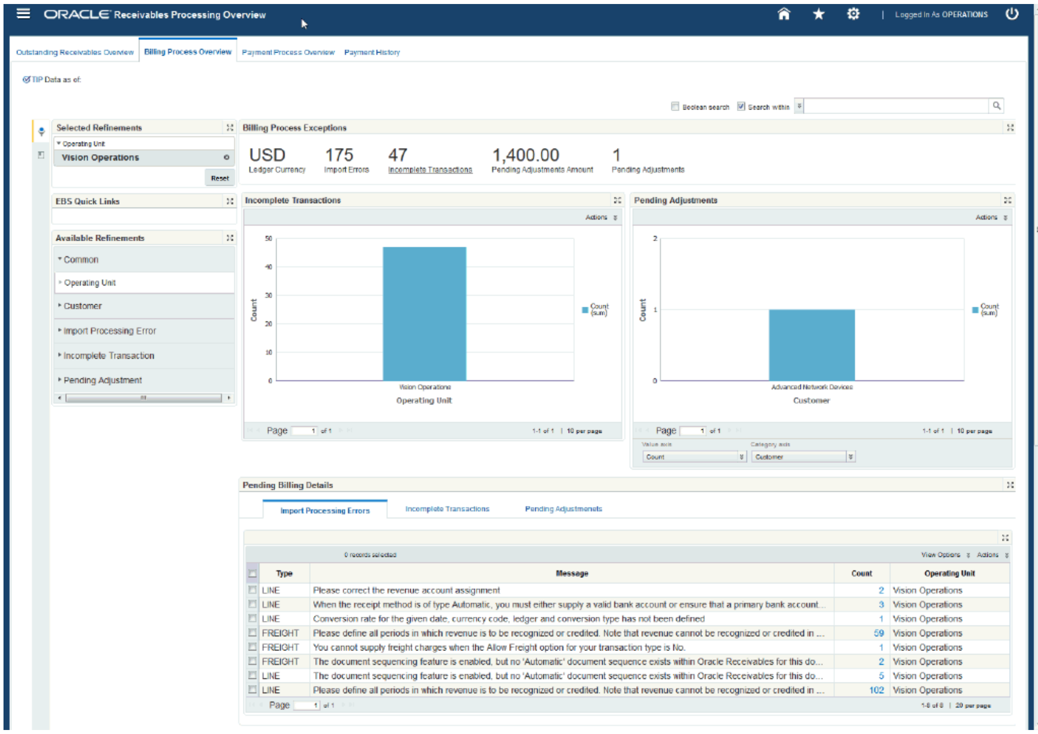
Billing Process Overview Page

The Billing Process Overview page allows receivables personnel to analyze and process billing transactions. This page displays potential issues that require attention in the billing process, such as incomplete transactions, adjustments pending approval, and import errors.

You can navigate to the core Receivables application from the Billing Process Overview page from links associated with each of the results tables described in the following table. The following is a display of the Billing Process Overview page.

From the Receivables responsibility, navigate to the Billing Process Overview page:

(N) Receivables Processing Overview > Billing Process Overview



Within the Billing Process Overview page, you can view and analyze billing process problem areas using display tools that include metrics, charts, graphs, and tables. The following describes the Billing Process Overview page regions and components:

Region	Components
Alerts	The pre-seeded alerts indicate potential problems and key elements of the receivables billing process. Key elements include significant number of incomplete transactions or adjustments pending approval within a particular operating unit. The Alerts component highlights operating units whose incomplete transaction count is greater than 100, or pending approval adjustment count is greater than 50. You can customize alerts based on your business requirements.

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Common Attributes
	  • Operating Unit
	  • Ledger Currency
	• Customer Attributes
	  • Account Number
	  • Bill To Customer
	  • Bill To Location
	  • Ship To Customer
	  • Ship To Location
	• Import Processing Error
	  • Type
	  • Message
	• Incomplete Transaction
	  • Incomplete Transaction Number
	  • Transaction Currency
	  • Transaction Class
	  • Transaction Type
	  • Transaction Date
	  • Incomplete Transaction Amount

Region	Components

	• Incomplete Transaction Source
	• Purchase Order Number
	
	• Pending Adjustment
	  • Adjustment Number
	  • Adjustment Amount
	  • Adjustment Date
	  • Receivable Activity
	  • Adjustment Status
	  • Adjustment Type
	  • Adjustment Reason
	  • Transaction Number
	  • Transaction Amount
	  • Transaction Source
	
	• Transaction Information (Descriptive Flexfield Attributes)
	  • Context Value
	
	Important: If you enable or update Descriptive Flex Field (DFF) functionality, then you must run Full Load to import all receivables data into the Endeca Data Domain.

Region	Components
Billing Process Exceptions (summarization bar)	• **Ledger Currency** Either value of the currency attribute selected or 'Multiple' if either no currency or multiple currencies are selected by the user. • **Import Errors** Total count of all import errors. • **Incomplete Transactions** Total count of all incomplete transactions. • **Pending Adjustments Amount** Sum of all adjustments pending approval. • **Pending Adjustments** Total count of all adjustments pending approval.

Graphs	Incomplete Transactions (bar chart)
	• Dimensions (value axis)
	  • Operating Unit
	  • Count
	Pending Adjustments (bar chart)
	• Dimensions (value axis)
	  • Count
	  • Amount
	• Dimensions (category axis)
	  • Customer
	  • Operating Unit

Region	Components

Billing Process Transaction List (tabbed component container)	Import Processing Errors (results table)
	• Column Sets
	  • Type
	  • Message
	  • Count
	  • Operating Unit
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Export to Microsoft Excel
	  • Compare
	Incomplete Transactions (results table)
	• Column Sets
	  • Transaction Number
	  • Transaction Class
	  • Transaction Type
	  • Transaction Date
	  • Transaction Source
	  • Transaction Currency
	  • Transaction Amount

Region	Components
	- Account Number - Bill To Customer - Bill To Location - Operating Unit - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Export to Microsoft Excel - Compare Pending Adjustments (results table) - Column Sets - Adjustment Number - Adjustment Date - Adjustment Reason - Adjustment Type - Adjustment Status - Transaction Currency - Adjustment Amount - Transaction Amount

Region	Components
	- Ledger Currency - Adjustment Accounted Amount - Transaction Number - Receivable Activity - Transaction Source - Account Number - Bill To Customer - Bill To Location - Operating Unit • View Options - Hide / Show Columns - Sort - Reset table to default • Actions - Export to Microsoft Excel - Compare

Payment Process Overview page

The Payment Process Overview page provides an overview of payment processes, transactions, and associated key metrics. This page targets the requirements of receivables personnel responsible for streamlining the processing of payment-related transactions, and provides information on items that require attention for ensuring smooth processing of receipt and remittance batches, unapplied receipts, and resolution of lockbox errors.

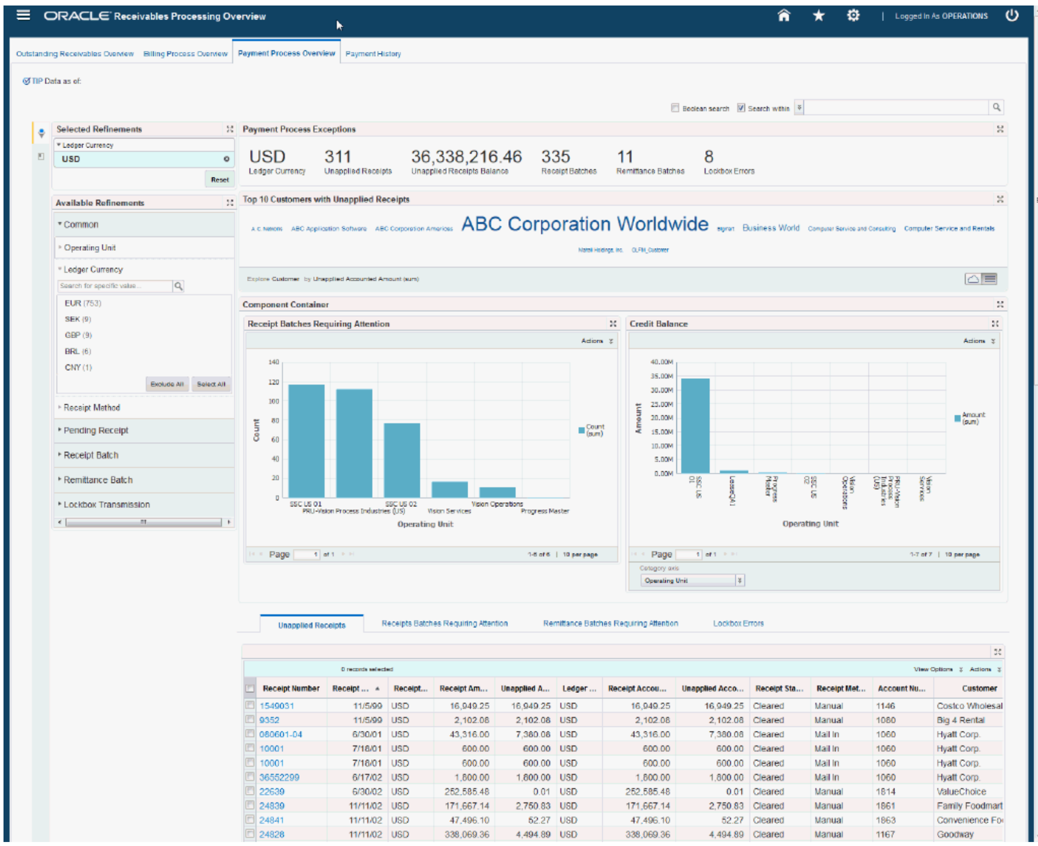
You can navigate to the core Receivables application from the Payment Process

Overview page to further investigate and take necessary actions. This is available from links within the Transaction List results tables. The following is a display of the Payment Process Overview page.

Note: Only standard receipts are included in the analysis.

From the Receivables responsibility, navigate to the Payment Process Overview page:

(N) Receivables Processing Overview > Payment Process Overview



Within the Payment Process Overview page, you can view and analyze payment-related transactions and problem areas using display tools that include metrics, charts, graphs, and tables. The following describes the Payment Process Overview page regions and components:

Region	Components
Alerts	The pre-seeded alerts indicate potential payment-related transaction problems. Problems include excessive unapplied receipts by customers, or extended ages of lockbox transmissions. The Alerts component highlights customers whose unapplied receipt count is greater than 50. You can customize alerts based on your business requirements.
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Common Attributes
	  • Operating Unit
	  • Ledger Currency
	  • Receipt Method
	• Pending Receipt
	  • Account Number
	  • Customer
	  • Customer Location
	  • Receipt Number
	  • Receipt Currency
	  • Receipt Amount
	  • Receipt Date
	  • Unapplied Amount
	  • Receipt Status
	  • Receipt State
	• Receipt Batch
	  • Receipt Batch Number
	  • Receipt Batch Source
	  • Receipt Batch Date

Region	Components
	- Receipt Batch Status - Receipt Batch Process Status - Receipt Batch Type - Remittance Batch - Remittance Batch Number - Remittance Method - Remittance Batch Process Status - Bank Name - Bank Branch - Bank Account Number - Lockbox Transmission - Transmission Name - Creation Date - Status - Receipt Information (Descriptive Flexfield Attribute) - Context Value **Important:** If you enable or update Descriptive Flex Field (DFF) functionality, then you must run Full Load to import all receivables data into the Endeca Data Domain.

Region	Components
Payment Process Exceptions (summarization bar)	• **Ledger Currency** • **Unapplied Receipts** • **Unapplied Receipts Balance** • **Receipt Batches** • **Remittance Batches** • **Lockbox Errors**
Top Ten Customers with Unapplied Receipts (tag cloud)	Top Ten Customers with Unapplied Receipts **Note:** The Top Ten Customers with Unapplied Receipts tag cloud component displays the top ten customers with unapplied receipts by frequency of occurrence.

Region	Components

Transaction List (tabbed component container)	Unapplied Receipts (results table)
	• Column Sets
	  • Receipt Number
	  • Receipt Date
	  • Receipt Currency
	  • Receipt Amount
	  • Unapplied Amount
	  • Ledger Currency
	  • Receipt Accounted Amount
	  • Unapplied Accounted Amount
	  • Receipt Status
	  • Receipt Method
	  • Account Number
	  • Customer
	  • Customer Location
	  • Receipt State
	  • Operating Unit
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions

Region	Components
	- Print - Export to Microsft Excel - Compare Receipts Batches Requiring Attention (results table) - Column Sets - Batch Number - Batch Type - Batch Date - Batch Status - Batch Process Status - Receipt Method - Batch Currency - Actual Count - Control Count - Operating Unit - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print

Region	Components

	- Export to Microsoft Excel
	- Compare
	
	Remittance Batches Requiring Attention (results table)
	- Column Sets
	  - Batch Number
	  - Batch Date
	  - Batch Process Status
	  - Remittance Method
	  - Bank Name
	  - Bank Branch
	  - Batch Currency
	  - Actual Count
	  - Control Count
	  - Operating Unit
	- View Options
	  - Hide / Show Columns
	  - Sort
	  - Reset table to default
	- Actions
	  - Print
	  - Export to Microsft Excel

Region	Components
	- Compare Lockbox Errors (results table) - Column Sets - Transmission Name - Creation Date - Lockbox Number - Status - Number of Errors - Operating Unit - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export to Microsft Excel - Compare

Region	Components

Graphs	Credit Balance (bar chart)
	• Dimensions (category axis)
	  • Operating Unit
	  • Customer
	
	Receipt Batches Requiring Attention (bar chart)
	• Dimensions (category axis)
	  • Operating Unit
	  • Count

Payment History Page

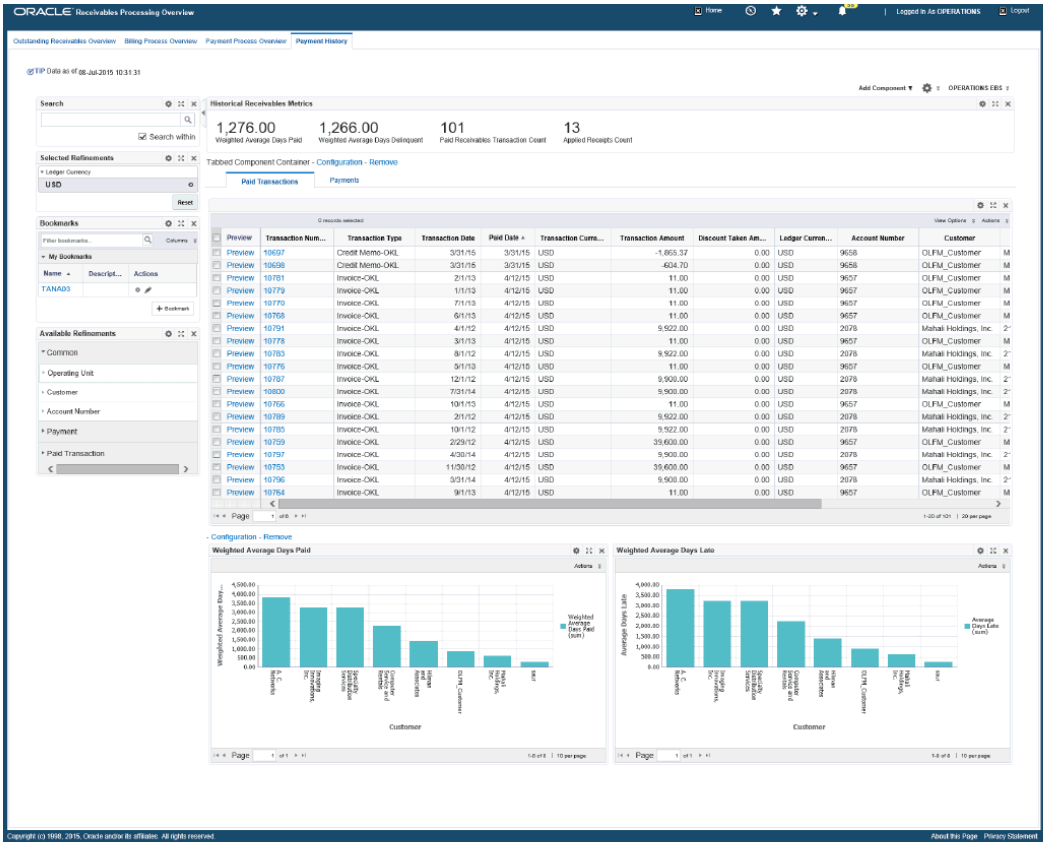
The Payment History page provides an overview of paid transactions and payments, and associated key metrics. This page targets the requirements of receivables personnel and provides insight into recent historical payment patterns across customers and operating units.

> **Note:** Only transactions that have been fully paid during the period (or final payment was applied) and receipts that have been fully applied display on this page. If transactions have been partially paid, or receipt was only partially applied, then they will display in either the Outstanding Receivables or Payment Process pages.

You can navigate to the core Receivables Transactions and Receipts windows from the Payment History page to investigate and take necessary actions. These pages are available from links associated with specific transactions in the Paid Transactions and Payments results tables. The following is a display of the Payment History page.

From the Receivables responsibility, navigate to the Payment History page:

(N) Receivables Processing Overview > Payment History



Within the Payment History page, you can view and analyze paid transactions and payments using display tools that include metrics, charts, graphs, and tables. The following describes the Payment History page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Common
	  ◦ Operating Unit
	  ◦ Ledger Currency
	  ◦ Customer
	  ◦ Account Number
	• Payment
	  ◦ Receipt Number
	  ◦ Receipt Currency
	  ◦ Receipt Amount
	  ◦ Receipt Date
	  ◦ Application Date
	  ◦ Receipt Class
	  ◦ Receipt Method
	  ◦ Receipt Status
	• Paid Transaction
	  ◦ Transaction Number
	  ◦ Transaction Currency
	  ◦ Transaction Class
	  ◦ Transaction Type

Region	Components
	- Transaction Date - Transaction Amount - Discount Taken Amount - Paid Date - Transaction Source - Sales Order Number - Salesperson - Transaction Context - Transaction Reference - Bill To Location - Ship To Customer - Ship To Location - Collector - Profile Class - Transaction Information (Descriptive Flexfield Attributes) - Context Value **Important:** If you enable or update Descriptive Flex Field (DFF) functionality, then you must run Full Load to import all receivables data into the Endeca Data Domain. - Receipt Information (Descriptive Flexfield

Region	Components
	Attributes) • Context Value **Important:** If you enable or update Descriptive Flex Field (DFF) functionality, then you must run Full Load to import all receivables data into the Endeca Data Domain.
Historical Receivables Metrics (summarization bar)	• **Weighted Average Days Paid** For paid receivables transactions (paid off completely during the historical period specified during setup), the average number of days between sale and receipt of final payment weighted by receivables amount. • **Weighted Average Days Delinquent** The average number of days between the invoice due date and final paid/applied date. • **Paid Receivables Transactions Count** Count of receivables transactions paid fully during the specific historical period (profile option setting). • **Applied Receipts Count** Count of receipts applied (based on final/full application) during the specific historical period (profile option setting).

Region	Components

Transaction List (tabbed component container)	Paid Transactions (results table)
	• Column Sets
	  • Transaction Number
	  • Transaction Type
	  • Transaction Date
	  • Paid Date
	  • Transaction Currency
	  • Transaction Amount
	  • Discount Taken Amount
	  • Ledger Currency
	  • Accounted Amount
	  • Account Number
	  • Customer
	  • Bill To Location
	  • Purchase Order Number
	  • Operating Unit
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print

Region	Components
	- Export - Compare Payments (results table) - Column Sets - Receipt Number - Receipt Date - Application Date - Receipt Currency - Receipt Amount - Ledger Currency - Accounted Amount - Account Number - Customer - Transaction Numbers - Operating Unit - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print

Region	Components
	• Export
Graphs	Weighted Average Days Paid (bar chart) Weighted Average Days Late (bar chart)

Oracle Financials Information Discovery Plus: Receivables Product Configuration

Setting Up Oracle Receivables

The Oracle Receivables application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

You must complete the following steps to set up Oracle Receivables:

1. Set Access Control, page 14-60 by assigning UMX roles and updating access grants.

2. Run the full load graph, page 14-62 in the Clover server to import all transaction and dispute data.

3. Schedule Setup, page 14-62 in the Clover server to run incremental load graph.

4. Set Profile Options, page 14-64.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Receivables

As part of the Oracle E-Business Suite-EID integration for the Oracle Receivables application, the following UMX Roles are provided:

UMX Role	Internal Code Name
OIR Endeca Internal Role	UMX|ARI_INT_ENDECA_ACCESS_ROLE
OIR Endeca External Role	UMX|ARI_EXT_ENDECA_ACCESS_ROLE

You must add the new UMX role 'OIR Endeca Internal Role' (Internal Code Name: UMX|ARI_INT_ENDECA_ACCESS_ROLE) for the internal user Receivables responsibility to enable the Endeca menus. Add the 'OIR Endeca External Role' (Internal Code Name: UMX|ARI_EXT_ENDECA_ACCESS_ROLE) for external users accessing iReceivables using their custom responsibility to enable Endeca menus for the custom responsibility. You must assign these UMX roles to the responsibilities. When the UMX roles are assigned to the iReceivables Information Portal, the Endeca pages appear.

If you want to use the Endeca-related roles with more than one responsibility, then you must have additional grants with a security context corresponding to each responsibility. You can add grants for a given role as a separate process instead of while you are adding the role to the responsibility.

Receivables includes separate Permissions, Grants, and Responsibilities due to the sensitive information displayed on the Internal and External Outstanding Receivables Overview Pages. The following are the Receivables Permission Sets, Grants, and Responsibilities.

Permission Sets	Internal Code Name
OIR Endeca Internal Access Permission Set	OIR_ENDECA_INT_ACCESS_PS
OIR Endeca External Access Permission Set	OIR_ENDECA_EXT_ACCESS_PS

Grants	Internal Code Name
OIR Internal Access Grant	OIR_ENDECA_INT_ACCESS_GRANT
OIR External Access Grant	OIR_ENDECA_EXT_ACCESS_GRANT

Responsibilities	Function Name
iReceivables 2.0 Internal	ARI_INTERNAL
iReceivables Account Management	ARI_EXTERNAL

Complete the following steps to enable Endeca Menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.
2. Update OIR_ENDECA_INT_ACCESS_GRANT (OIR Internal Access Grant)
3. Update OIR_ENDECA_EXT_ACCESS_GRANT (OIR External Access Grant)

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Loading Receivables Data into the Endeca Data Domain

Clover ETL within Endeca queries receivables views and completes a full data load to the receivables data domain in Endeca. After the first data load, you can perform full data load and incremental data load as required. Incremental data load updates all records in the Endeca data domain which were updated in EBS after the last load. After the data has been loaded into the Endeca data domain, it can be loaded and displayed in the receivables extensions for Oracle Endeca pages.

Receivables Data Sources in the Endeca Data Domain

Data sources are defined in the receivables data domain in Endeca and are used to load data for different Receivables Extensions for Oracle Endeca pages. These data sources include:

- **ar**: This data source is the parent data source for the following data sources:
  - **ar-oirtrx**: This data source loads data for the internal and external Outstanding Receivables Overview pages.
  - **ar-oirdspt**: This data source loads data for the Disputes Overview page.
  - **ar-trx**: This data source loads data for the Outstanding Receivables Overview page.
  - **ar-billproc**: This data source loads data for the Billing Process Overview page.
  - **ar-pmtproc**: This data source loads data for the Payment Process Overview page.
  - **ar-history**: This data source loads data for the Payment History Overview page.

Setting Up the Scheduler for Endeca Full and Incremental Load

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

> **Note:** No changes will be reflected in the Endeca Receivables pages until incremental refresh is performed. Therefore, Oracle recommends that you schedule incremental load to perform frequent updates. This process finishes quickly. Full load can take time to finish and is not required once it has been implemented unless exceptions occur, such as

data corruption, or the aging bucket profile is changed.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select the graph for schedule to run. I.e. Full.grf or Incremental.grf.
13. Click 'Create' to set the scheduler.

ETL Parameters for Receivables

You can load data to the receivables data domain by running full load and incremental load graphs provided by receivables.

To load data to the Receivables data domain:

1. Using the URL for the EID Integrator Server, navigate to the sandboxes page and expand the graph node under receivables.
2. Graphs to load data include:
   - **LoadDataFull.grf**: This graph deletes all existing data, initializes the data domain, and loads all data to the Receivables data domain.
   - **LoadDataIncr.grf**: This graph loads updated and new data, and deletes closed

or incomplete records since last full load or incremental load was processed. The Purpose of this graph is to synchronize the Endeca data domain with the database. Oracle recommends that you run this graph frequently (every few minutes), depending on your business requirements.

Profile Options for Receivables

You must set the following profile options:

Profile Option Name	Description
OIR: Aging Buckets	This site level profile reuses the Oracle Receivables aging buckets for the Outstanding Receivables Overview pages.
OIR: Filter Transactions Days Older Than	This site level profile reuses the Oracle Receivables dispute range for the Disputes Overview page.
AR: Aging Buckets for Endeca	This site level profile reuses the Oracle Receivables aging buckets for the Outstanding Receivables Overview page.
AR: History Range for Endeca	This site level profile reuses the Oracle Receivables history range for the Payment History page.

Views and Joins for Receivables

The following views are used by the ETL layer in Endeca to load Receivables data to the Endeca data domain:

View Name	Purpose
ARI_EID_TRX_V	Loads transaction data from the AR Payment Schedule and other reference tables. Transaction types include invoice, credit memo, debit memo, charge back, deposit, and guarantee.

View Name	Purpose
AR_EID_INCOMPLETE_TRX_V	Loads incomplete transaction data from the AR Transaction and other reference tables. Transaction types include invoice, credit memo, debit memo, charge back, deposit, and guarantee.
AR_EID_ADJUSTMENT_V	Loads waiting approval and additional research adjustments data from the AR Adjustment and other reference tables.
AR_EID_INTERFACE_ERROR_V	Loads invoice import error data grouped by error type, error text, and operating unit from the AR Interface Error and other reference tables.
AR_EID_RECEIPT_V	Loads unapplied receipts data from the AR Cash Receipt and other reference tables.
AR_EID_RCEIPT_BATCH_V	Loads requiring attention receipt batches data from the AR Receipt Batch and other reference tables.
AR_EID_REMITTANCE_BATCH_V	Loads requiring attention remittance batches data from the AR Remittance Batch and other reference tables.
AR_EID_TRANSMISSION_ERROR_V	Loads lockbox error data rom the AR Lockbox, Transmission, and other reference tables.
AR_EID_TRX_HISTORY_V	Loads fully paid and closed transactions data from the previous three months from the AR Transaction, Payment Schedule, and other reference tables.
AR_EID_RECEIPT_HISTORY_V	Loads fully applied and closed receipts data from the previous three months from the AR Cash Receipt and other reference tables.
ARI_EID_CMREQ_V	Loads credit memo request related data including transaction number, credit request number, request amount, request date, and so on.

Menus for Endeca Receivables

Endeca Receivables integration includes the following new user menu and Responsibilities functions:

Menus

User Function Name	Function Name
OIR Endeca Search Page	ARI_ENDECA_SEARCH
OIR Endeca Dispute Home Page	ARI_ENDECA_DISPUTE_HOME_PG
iReceivables V2.0 Internal	ARI_MENU_INTERNAL
iReceivables Account Management	ARI_MENU_EXTERNAL
AR Overview Endeca Search	AR_ENDECA_OVIEW_HOME
AR Billing Process Endeca Search	AR_ENDECA_BILLPROC_HOME
AR Payment Process Endeca Search	AR_ENDECA_PMTPROC_HOME
AR Payment History Endeca Search	AR_ENDECA_PMTHISTRY_HOME
Receivables Endeca Overview Page	AR_EID_OVIEW_PAGE
Receivables Endeca Billing Process Page	AR_EID_BILLPROC_PAGE
Receivables Endeca Payment Process Page	AR_EID_PMTPROC_PAGE
Receivables Endeca Payment History Page	AR_EID_PMTHISTRY_PAGE

Responsibilities

User Function Name	Function Name
iReceivables 2.0 Internal	ARI_INTERNAL
iReceivables Account Management	ARI_EXTERNAL

User Function Name	Function Name
Receivables Extension for Endeca	AR_ENDECA_OVERVIEW

15

Oracle Financials Information Discovery Plus: Fixed Assets

This chapter covers the following topics:

- Overview
- Asset Reconciliation Page
- Asset Cost Page
- Asset Aging Page
- Asset Location Page
- Mass Transactions Page
- Additions Pipeline Page
- Setting Up Oracle Fixed Assets Information Discovery
- Setup and Configuration Steps
- Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Fixed Assets
- Scheduling Setup for Full Endeca Upload or Refresh
- ETL Parameters for Fixed Assets
- Profile Options for Fixed Assets
- Views and Joins for Fixed Assets
- Menus for Endeca Fixed Assets

Overview

The Fixed Asset Manager can use the Oracle Financials Information Discovery Plus: Fixed Assets to search and filter assets, locations, and pending mass additions. Oracle Financials Information Discovery Plus: Fixed Assets empowers fixed asset managers and fixed asset accountants to optimize asset utilization, explore asset locations and assignments, and ease reconciliation of assets by providing powerful search and sophisticated available refinements capabilities. The operational efficiency and insight into the asset life cycle is greatly enhanced through key fixed asset metrics, drillable graphs, alerts, and tag clouds, enabling users to quickly identify problem areas and outstanding items that require intervention. Oracle Financials Information Discovery Plus: Fixed Assets allows users to efficiently navigate to the relevant Oracle Applications to take corrective action as necessary.

You can search using Fixed Assets pages and Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS. In Fixed Assets, the following pages enable search functions using Endeca Information Discovery integration:

- **Asset Reconciliation Page**: This page displays reconciliation information between fixed asset accounts in SLA (Sub-Ledger Accounting) and in GL (General Ledger). The Fixed Asset Manager can quickly compare balances between SLA and GL, investigate discrepancies and take required and corrective actions.

- **Asset Cost Page**: This page offers superior navigation and discovery capabilities into all financial transactions affecting asset values and provides reconciliation of accounted asset cost and accumulated depreciation to balances in Oracle General Ledger.

- **Asset Aging Page**: This page offers insight into remaining life of your assets with easy overview of asset cost, accumulated depreciation and net book value, and offers actionable links to submit a work request in Oracle Enterprise Asset Management, or to create a new purchase requisition in Oracle Procurement

- **Asset Locations Page**: This Page offers tracking of fixed assets across all locations and gives the opportunity to explore assignments to employees, to detect discrepancies in cost center assignments, and provides actionable links to execute asset transfers and assignments in Oracle Assets in order to resolve missing assignments or mis-allocated resources.

- **Mass Transactions Page**: This page offers insight into pending transactions such as mass additions, mass reclassifications, mass revaluations, and mass transfers. It provides actionable links to Oracle Assets for the fixed asset accountant to ensure all pending transactions are processed on time in order to close asset books with confidence.

- **Additions Pipeline Page**: This page allows the fixed assets manager to check all additions pipeline that exist in Payables and Projects that affect asset costs.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Fixed Assets Information Discovery application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID:

2214431.1). You must read this document and make note of the requirements before you begin your installation.

Oracle Financials Information Discovery Plus: Fixed Assets User Interfaces

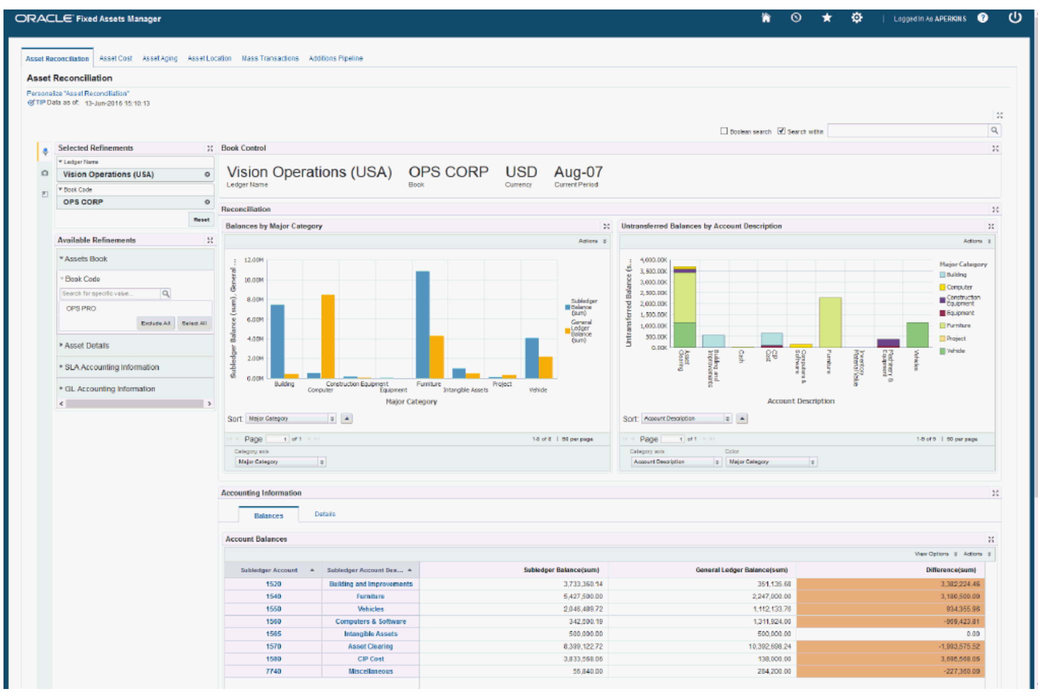
Asset Reconciliation Page

The Asset Reconciliation Page displays an overview and visibility into all asset accounts balances. Account balances for Oracle Assets and Oracle General Ledger display side by side making discrepancies easy to identify. The Asset Reconciliation page:

- Reconciles the year-to-date activities
- Finds discrepancies between Fixed Assets and General Ledger balances
- Minimizes errors and increases accuracy of financial statements

From the Assets Super User responsibility, navigate to the Asset Reconciliation page:

(N) Assets Information Discovery



Within the Asset Reconciliation page, you can highlight asset book and GL accounting discrepancies. This page displays reconciliation information between fixed asset accounts in SLA (Sub-Ledger Accounting) and in GL (General Ledger). The Fixed Asset Manager can quickly compare information between SLA and GL, investigate discrepancies and take required and corrective action. You can analyze data using asset metrics, charts, graphs, and tables. The following describes the Asset Reconciliation page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state so that you can return to it at a later time.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter the data, and allows you to quickly make adjustments to the current refinement by removing items from the list or clearing all filters.
Available Refinements	The Available Refinements component allows you to filter data based on the current available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Assets Book • Asset Details • SLA Accounting Information • GL Accounting Information

Region	Components
Book Control (summarization bar)	Book Control contains the following dimension values that spotlight items: • Ledger Name • Book • Currency • Current Period

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Reconciliation (component container)</td><td>Balances by Major Category (chart)

The Balances by Major Category chart displays the total account balances for asset cost accounts, accumulated depreciation accounts, CIP cost accounts, and clearing accounts by asset major category. You can change the category axis to SLA Account Description.
Sort Options
Major Category
Major Category by Subledger Balance (sum)
Major Category by General Ledger Balance (sum)
Group Dimensions (category axis)
Major Category
SLA Account Description
Untransferred Balances by Account Description

This chart displays the total untransferred balances to General Ledger by account description and assets major category. You can change the category axis to Account Line Type.
Sort Options
Account Description
Account Description by Untransferred Balance (sum)
Group Dimensions (category axis)
Account Description</td></tr>
</table>

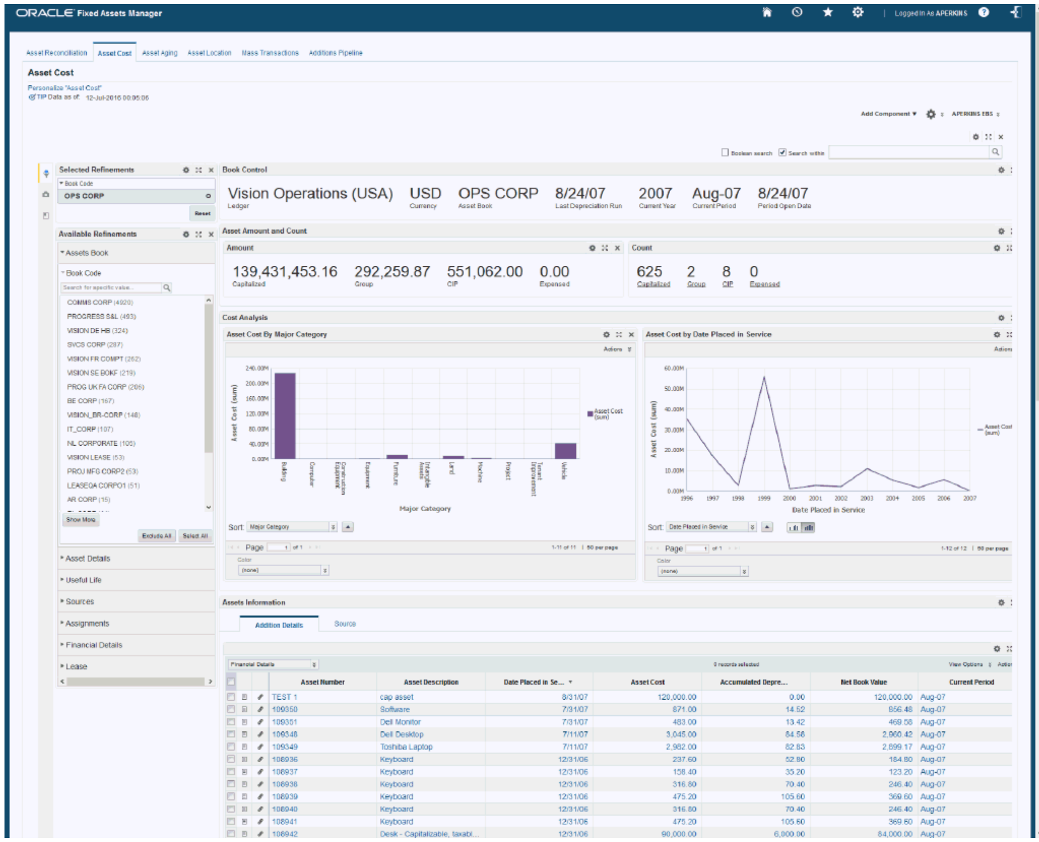
Region	Components
	• Account Line Type Name • Color • (None) • Major Category
Accounting Information (tabbed component container) Balances (tab)	Account Balances (results table) The Account Balances results table displays account balances information.
Accounting Information (tabbed component container) Details (tab)	Account Details (results table) The Account Details results table displays accounting detail information. • Links • Details Icon - displays the Record Details window.

Asset Cost Page

The Asset Cost page displays an overview of asset cost and accumulated depreciation by category, and a reconciliation between Fixed Assets (FA) and General Ledger (GL) by account for both cost and accumulated depreciation. You can view asset cost metrics, asset cost charts, and results tables. The following is a display of the Asset Cost page.

From the Assets Super User responsibility, navigate to the Asset Cost page:

(N) Assets Information Discovery



Within the Asset Cost page, you can track asset costs and accumulated depreciation balance by major category. You can analyze data using asset metrics, charts, graphs, and tables. The following describes the Asset Cost page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state so that you can return to it at a later time.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter the data, and allows you to quickly make adjustments to the current refinement by removing items from the list or clearing all filters.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the current available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Assets Book • Assets Details • Financial Details • Useful Life • Assignments • Sources • Lease • Warranty
Book Control (summarization bar)	Book Control contains the following dimensions value spotlight items: • Ledger • Currency • Asset Book • Current Fiscal Year • Last Deprecation Run • Current Period • Period Open Date

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Asset Amount and Count (summarization bar component container)</td><td>Amount
Capitalized
Group
CIP
Expensed
Note: All items are configured to calculate the total asset's cost by asset type and use the SumAmount custom view.

Count
Capitalized
Group
CIP
Expensed
Note: All items are configured to calculate the total asset's count by asset type, and use the SumCount custom view.</td></tr>
</table>

Region	Components
Asset Analysis (tabbed component container)	Balances (chart)

Accounts Reconciliation (tab)	The Balances chart displays the total account balances for asset cost accounts and accumulated depreciation accounts by asset major category. You can change the category axis to account code and account description.
	• Sort Options
	  • Major Category
	  • Major Category by Asset Cost (sum)
	  • Major Category by Accumulated Depreciation (sum)
	• Group Dimensions (category axis)
	  • Major Category
	  • Account
	  • Account Description

Region	Components

Asset Analysis (tabbed component container)
Cost Analysis (tab)
	Asset Cost by Major Category (chart)
	The chart displays asset cost across the major categories with the availability to drill down to Minor Category and Property Type.
	• Sort Options
	  • Major Category
	  • Major Category by Asset Cost (sum)
	
	Asset Cost by Date Placed in Service (chart)
	The chart displays asset cost by data placed in service (in years) with availability to drill down to Month then Day.
	• Sort Options
	  • Date Placed in Service
	  • Date Placed in Service by Asset Cost (sum)

Region	Components

Balance Reconciliation (component container)	Balance Reconciliation (results table)
	
	The Balance Reconciliation results table helps the asset manager to find any discrepancies in balances between fixed assets and general ledger, and also helps to speed the closing process.
	
	• Column Sets
	  • Asset Cost Balance
	  • Accumulated Depreciation Balance
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	• Links
	  • Review Asset Balance Icon - link to the Account Balances page.
	  • Review Accumulated Depreciation Balance icon - link to the Account Balances page.
	  • Account - link to the Account Balances page.
	
	Note: You can select values from the column sets to filter your results. The selected values are

Region	Components
	added to the Selected Refinements component and can be removed.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Assets Information (tabbed component container)</td><td>Addition Details (results table)
Column Sets
Financial Details
Asset Details
View Options
Hide / Show Columns
Sort
Reset table to default
Actions
Print
Export
Compare
Note: You must select two or more lines to compare asset records.
Links
Details icon - select the details icon to view Record Details for the selected asset.
Update Asset Details - link to the Assets form to update asset details.
Note: You can select values from the column sets to filter your results. The selected values are added to the Selected Refinements</td></tr>
</table>

Region	Components
	component and can be removed.

	Source (results table)
	• Column Sets
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	Note: You must select two or more lines to compare asset records.
	• Links
	  • Details icon - select the details icon to view Record Details for the selected asset.
	  • Update Asset Details - link to the Assets form to update asset details.
	Note: You can select values from the column sets to filter your results. The selected values are added to the Selected Refinements

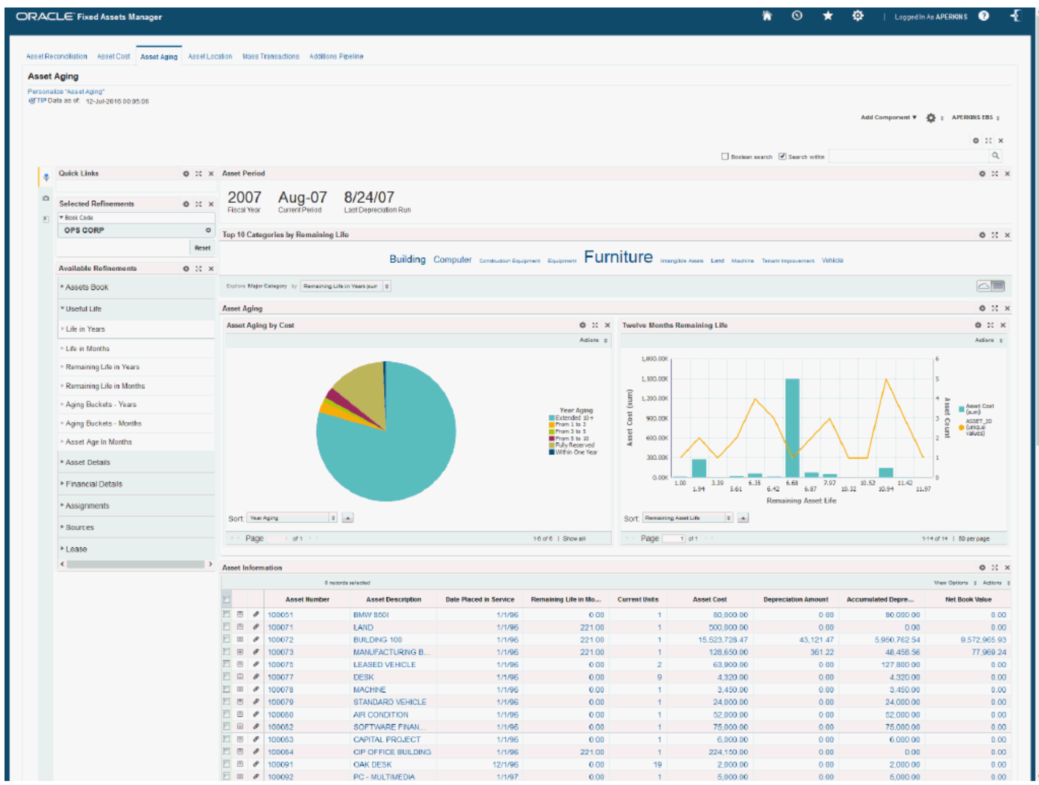
Region	Components
	component and can be removed.

Asset Aging Page

The Asset Aging page allows the fixed assets manager to search assets and displays aging assets and useful asset life information. You can view asset aging metrics, charts, and results tables. The following is a display of the Asset Aging page.

From the Assets Super User responsibility, navigate to the Asset Aging page:

(N) Assets Information Discovery > Asset Aging (tab)



Within the Asset Aging page, you can track asset aging and useful asset life information by category. You can analyze data using asset aging metrics, charts, graphs, and results tables. The following describes the Asset Aging page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
EBS Quick Links	Use the EBS Quick Links component to link to quickly navigate to other EBS Information Discovery Extensions. This component provides a link to the Maintenance Work Request OA page.
Bookmarks	The Bookmarks Component allows you to save a given navigation and component state so that you can return to it at a later time.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter the data, and allows you to quickly make adjustments to the current refinement by removing items from the list or clearing all filters.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Available Refinements</td><td>The Available Refinements component allows you to filter data based on the current available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names:
• Assets Book
• Useful Life
• Asset Details
• Financial Details
• Accounts
• Assignments
• Sources
• Lease</td></tr>
<tr><td>Top 10 Categories by Remaining Life (tag cloud container)</td><td>Top 10 Categories by Remaining Life

Note: The Top 10 Categories by Remaining Life tag cloud component displays the top ten asset categories by remaining life. The categories display in relative sizes by frequency of occurrence.

• Major Category view options:
  • Remaining Life in Years (sum)
  • Asset Cost (sum)</td></tr>
</table>

Region	Components

Asset Aging (component container)	Asset Aging by Cost (chart)
	The chart displays the aging buckets for assets (in years) and drills down to month aging.
	• Sort Options:
	  • Year Aging
	  • Year Aging by Asset Cost (sum)
	Twelve Months Remaining Life (chart)
	Note: The chart displays the count and the cost of assets that will complete their life within a year (asset life due in a year).
	• Sort Options:
	  • Remaining Asset Life
	  • Remaining Asset Life by Asset Cost (sum)
	  • Remaining Asset Life by ASSET_ID (unique values)

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Asset Information (component container)</td><td>Asset Aging Information (results table)

Note: The Asset Aging Information table displays financial information for the asset's useful life.

• View Options
  • Hide / Show Columns
  • Sort
  • Reset table to default
• Actions
  • Print
  • Export
  • Compare

Note: You must select two or more lines to compare asset records.

• Links
  • Details icon - select the details icon to view Record Details for the selected asset.
  • Create Purchase Requisition icon - link to the Requisitions form to create new purchase requisitions.

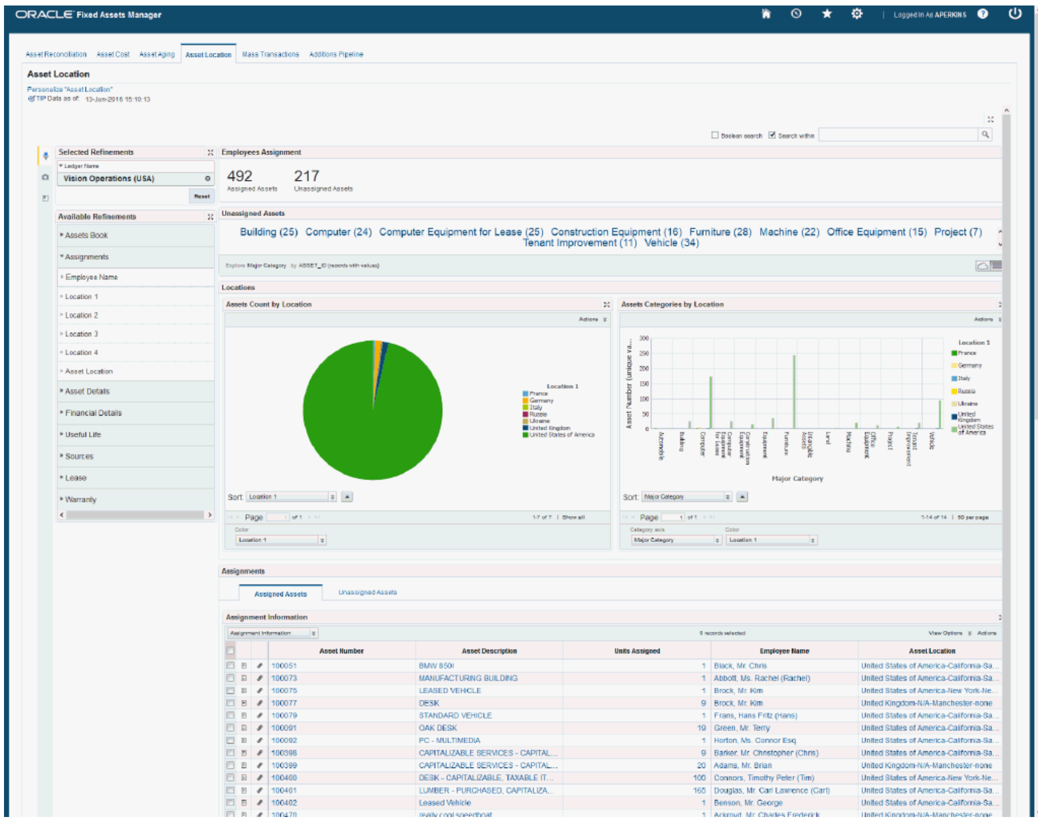
Note: You can select values from the column sets to filter your results. The selected values are added to the Selected Refinements component and can be removed.</td></tr>
</table>

Asset Location Page

The Asset Location page allows the fixed assets manager to search assets by location or by employees assigned to asset groups. You can view asset location metrics, charts, and results tables. The following is a display of the Asset Location page.

From the Assets Super User responsibility, navigate to the Asset Location page:

(N) Assets Information Discovery > Asset Location (tab)



Within the Asset Location page, you can select the ledger and asset book to check the location or assignment of a specific asset or group of assets. You can analyze data using asset location metrics, charts, graphs, and results tables. The following describes the Asset Location page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Bookmarks	The Bookmarks Component allows you to save a given navigation and component state so that you can return to it at a later time.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter the data, and allows you to quickly make adjustments to the current refinement by removing items from the list or clearing all filters.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the current available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Assets Book • Assignments • Asset Details • Financial Details • Accounts • Useful Life • Sources • Lease • Warranty
Employees Assignment (summarization bar)	The Employees Assignment summarization bar displays the number of assigned assets and unassigned assets to employees and contains the following metrics: • Assigned Assets • Unassigned Assets

Region	Components
Unassigned Assets (tag cloud)	Unassigned Assets **Note:** The Unassigned Assets tag cloud component displays the top unassigned assets by major category. You can drill down from the major category to the minor category by selecting a value within the tag cloud. Selections appear in the Selected Refinements component.

Region	Components

Locations (component container)	Assets Count by Location (chart)
	
	Note: The chart displays assets count by location segments.
	
	• Sort Options:
	  • Location 1
	  • Location 1 by Asset Number (unique values)
	• Series Dimensions (color)
	  • Location 1
	  • Location 2
	  • Location 3
	  • Location 4
	  • Location 5
	  • Location 6
	  • Location 7
	
	Assets Categories by Location (chart)
	
	Note: The chart displays the asset cost by major category and by location.
	
	• Sort Options:
	  • Major Category
	  • Major Category by Asset Number (unique values)
	• Dimensions (category axis)

Region	Components
	- Major Category - Minor Category - Series Dimensions (color) - Location 1 - Location 2 - Location 3 - Location 4 - Location 5 - Location 6 - Location 7

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Results Table (tabbed component container)</td><td>Assignment Details (results table)

Note: The Assignment Details results table displays assignment information.

• Column Sets
  • Assignment Information
  • Financial Information
• View Options
  • Hide / Show Columns
  • Sort
  • Reset table to default
• Actions
  • Print
  • Export
  • Compare

    Note: You must select two or more lines to compare asset records.

• Links
  • Details icon - select the details icon to view Record Details for the selected asset.
  • Asset Transfer icon - link to the Assets form to update assets.</td></tr>
</table>

Region	Components

	Note: You can select values from the column sets to filter your results. The selected values are added to the Selected Refinements component and can be removed.
	
	Unassigned Assets (results table)
	
	Note: The Unassigned Assets table displays assets not assigned to employees.
	
	• Column Sets
	  • Assignment Information
	  • Financial Information
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	
	Note: You must select two or more lines to compare asset records.
	
	• Links

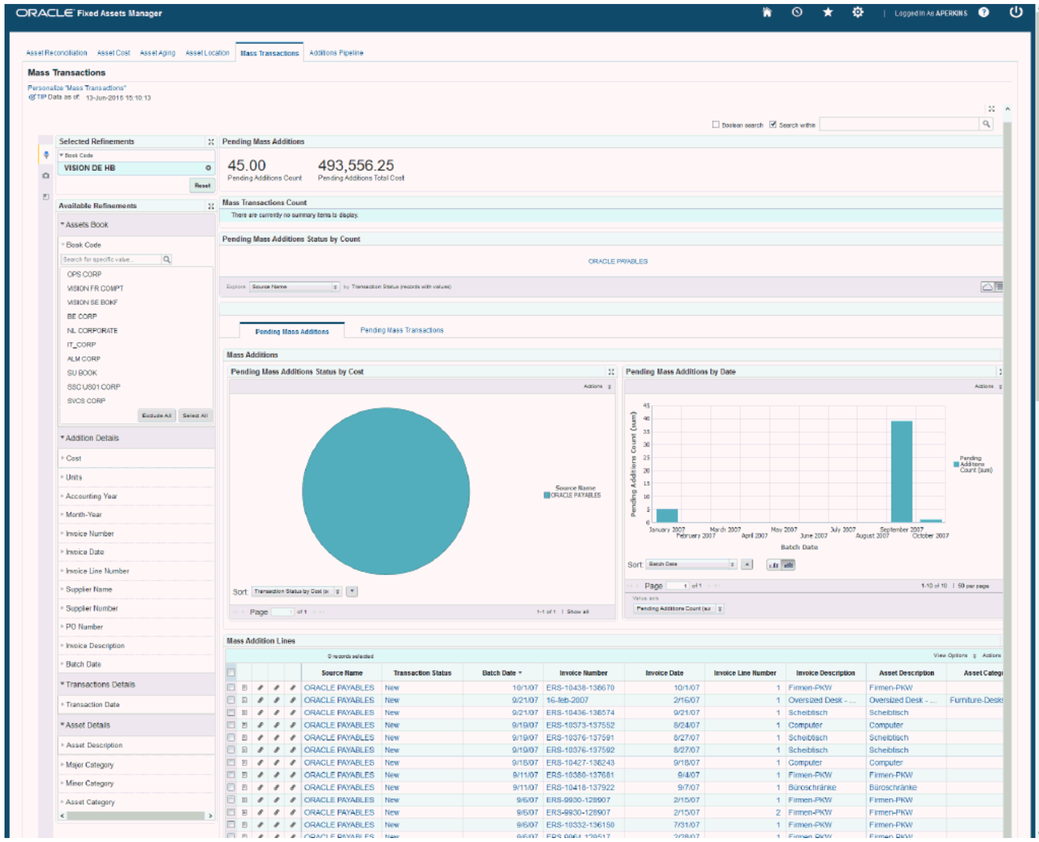
Region	Components
	• Details icon - select the details icon to view Record Details for the selected asset. • Assign Employee icon - link to the Assets form to update assets. **Note:** You can select values from the column sets to filter your results. The selected values are added to the Selected Refinements component and can be removed.

Mass Transactions Page

The Mass Transactions page allows fixed assets accountants to easily find pending transactions and take required actions. You can view pending transaction metrics, charts, and results tables. The following is a display of the Mass Transactions page.

From the Assets Super User responsibility, navigate to the Mass Transactions page:

(N) Assets Information Discovery > Mass Transactions (tab)



Within the Mass Transactions page, you can track pending transactions and take required actions. You can analyze data using asset metrics, charts, graphs, and tables. The following describes the Mass Transactions page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Bookmarks	The Bookmarks Component allows you to save a given navigation and component state so that you can return to it at a later time.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter the data, and allows you to quickly make adjustments to the current refinement by removing items from the list or clearing all filters.
Available Refinements	The Available Refinements component allows you to filter data based on the current available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Assets Book • Addition Details • Transactions Details • Asset Details

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Pending Mass Additions (summarization bar)</td><td>The Pending Mass Additions summary bar contains the following metrics:
Pending Additions Count
Pending Additions Total Cost</td></tr>
<tr><td>Mass Transactions Count (summarization bar)</td><td>The Mass Transactions Count summarization bar contains the following metrics:
Mass Transfers
Mass Reclassifications
Mass Changes
Mass Revaluations
Mass Retirements</td></tr>
<tr><td>Pending Mass Additions Status by Count (tag cloud)</td><td>Pending Mass Additions Status by Count (tag cloud)

Note: The Pending Mass Additions Status by Count tag cloud component displays the top pending mass additions status by category. The categories display in relative sizes by frequency of occurrence.

The tag cloud component is configured to display the following dimensions:
The pending assets interface lines status (Delete, Split, Merge, Add to Assets, Post), or
The Pending Assets Interface Lines Source Names (Payables, Enterprise Assets Managements, Web-ADI)</td></tr>
</table>

Region	Components

Mass Additions (tabbed component container)
 	
Pending Mass Additions (tab)
	Pending Mass Additions Status by Cost (chart)
	
	The Pending Mass Additions Status by Cost chart displays the total sum of asset cost per each status type.
	
	• Sort Options
	  • Transaction Status
	  • Transaction Status by Cost (sum)
	• Group Dimensions (category axis)
	  • Major Category
	  • Account
	  • Account Description
	
	Pending Mass Additions by Date (chart)
	
	The Pending Mass Additions by Date chart displays both the number and total cost of the pending additions per mass additions batch date.
	
	• Sort Options
	  • Batch Date
	  • Batch Date by Pending Additions Count (sum)
	• Dimensions (value axis)
	  • Pending Additions Count (sum)
	  • Pending Additions Total Cost (sum)

Region	Components

Pending Mass Transactions Details (tabbed component container)
 	
Pending Mass Transactions (tab)
	Pending Transactions by Record Type (chart)
	
	The Pending Transactions by Record Type chart displays the number of pending transactions per record type.
	
	• Sort Options
	    • Record Type
	    • Record Type by Number of Transactions (sum)
	• Series Dimensions (color)
	    • (none)
	    • Record Type
	
	Pending Mass Transaction by Type (chart)
	
	The Pending Mass Transaction by Type chart displays the number of pending transactions per each transaction type.
	
	• Series Metrics (value axis)
	    • Transfers Count (sum)
	    • Changes Count (sum)
	• Dimensions (category axis)
	    • Transfer Type
	    • Change Type

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Results Table component container</td><td>Mass Addition Lines (results table)

Note: The Mass Additions Lines results table display when you select the Pending Mass Additions tab.

• View Options
  • Hide / Show Columns
  • Sort
  • Reset table to default
• Actions
  • Print
  • Export
  • Compare

Note: You must select two or more lines to compare asset records.

• Links
  • Details icon - select the details icon to view Record Details for the selected asset.
  • Prepare Mass Additions icon - link to the Find Mass Additions form to review, merge, split, post, and purge mass additions.
  • Post Mass Additions icon - link to submit the Post Mass Additions concurrent request.
  • Delete Mass Additions icon - link to</td></tr>
</table>

Region	Components

	submit the Delete Mass Additions concurrent request.
	Note: You can select values from the column sets to refine your results. The selected values are added to the Selected Refinements component and can be removed.
	
	Pending Transaction Details (results table)
	Note: The Mass Additions Lines results table display when you select the Pending Mass Transactions tab.
	
	• Column Sets
	  • Pending Mass Transactions
	  • Pending Transfers
	  • Pending Changes
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	Note: You must select two or

Region	Components

	more lines to compare asset records.
	
	• Links
	  • Details icon - select the details icon to view Record Details for the selected asset.
	  • Run Mass Transfers icon - link to the Mass Transfers form to transfer a group of assets between general ledger expense accounts, employees, and locations.
	  • Run Mass Reclassifications icon - link to the Mass Reclassifications form. Reclassify assets to update information, correct data entry errors, or when consolidating categories.
	  • Run Mass Changes icon - link to the Run Mass Changes form to correct an error or update financial and depreciation information for a single asset or for multiple assets.
	  • Run Mass Revaluations icon - link to the Mass Revaluations form.
	  • Run Mass Retirement icon - link to the Mass Retirements form to retire a group of assets. You can also use this form to reinstate a mass retirement transaction.
	
	Note: You can select values from the column sets to refine your results. The selected values are added to the Selected Refinements component and

Region	Components
	can be removed.

Additions Pipeline Page

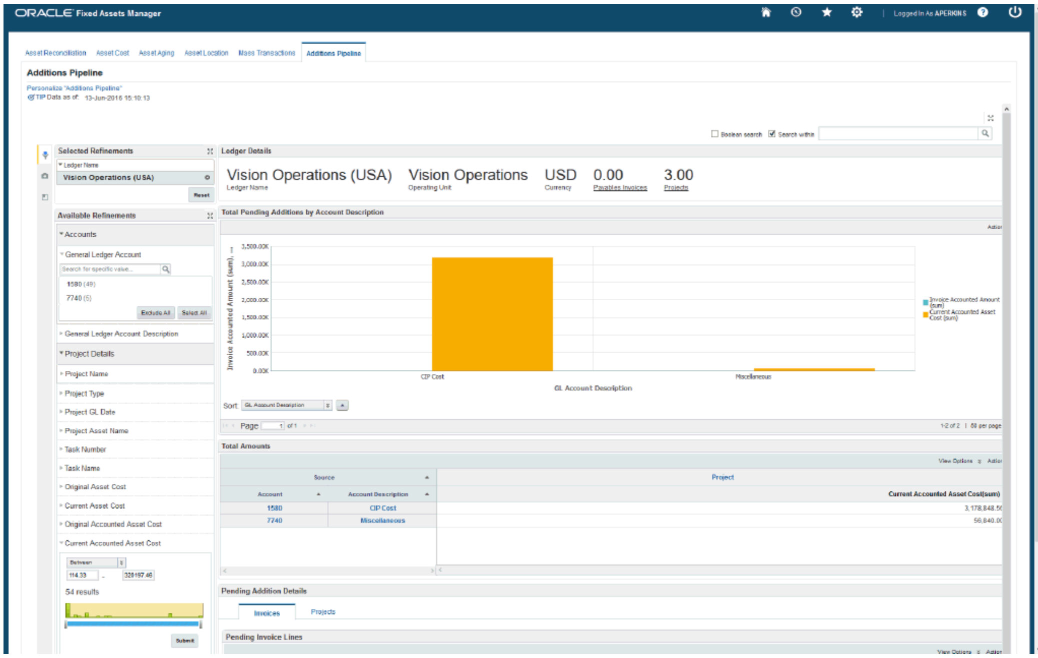
The Additions Pipeline page identifies all pending transactions that exist in Payables and Projects that affect asset costs. The Additions Pipeline page provides:

- Ledger details that include ledger name, operating unit, functional currency, and count of pending invoices and projects.
- Total pending additions by account description.
- Total amounts.
- Additions pipeline details (invoices, projects).

You can view pending transaction metrics, charts, and results tables. The following is a display of the Additions Pipeline page.

From the Assets Super User responsibility, navigate to the Additions Pipeline page:

(N) Assets Information Discovery > Additions Pipeline (tab)



Within the Additions Pipeline page, the Fixed Assets manager can check the additions pipeline using metrics, graphs, and results tables. The following describes the Additions Pipeline page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Bookmarks	The Bookmarks Component allows you to save a given navigation and component state so that you can return to it at a later time.

Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter the data, and allows you to quickly make adjustments to the current refinement by removing items from the list or clearing all filters.
Available Refinements	The Available Refinements component allows you to filter data based on the current available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Ledger • Accounts • Invoice Details • Project Details
Ledger Details (summarization bar)	The Ledger Details summary bar contains the following metrics: • Ledger Name • Operating Unit • Currency • Payables Invoices • Projects

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Total Pending Additions by Account Description (component container)</td><td>Total Pending Additions by Account Description (chart)

The Total Pending Additions by Account Description chart displays assets count by location segments.
Sort Options
GL Account Description
GL Account Description by Invoice Accounted Amount (sum)
GL Account Description by Current Accounted Asset Cost</td></tr>
<tr><td>Total Amounts (component container)</td><td>Total Amounts (pivot table)

The Total Amounts table displays the total additions pipeline.</td></tr>
<tr><td>Pending Addition Details (tabbed component container)

Invoices (tab)</td><td>Invoices (results table)

The Invoices results table displays payable invoice details.
View Options
Hide / Show Columns
Sort
Reset table to default
Actions
Print
Export</td></tr>
</table>

Region	Components

Pending Addition Details (tabbed component container)
 	
Projects (tab)
	Pending Project Asset Lines (results table)
	
	The Pending Project Asset Lines table displays project asset lines details.
	
	• View Options
	    • Hide / Show Columns
	    • Sort
	    • Reset table to default
	• Actions
	    • Print
	    • Export

Oracle Fixed Assets Information Discovery Product Configuration

Setting Up Oracle Fixed Assets Information Discovery

The Oracle Fixed Assets Information Discovery product configuration setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Fixed Assets Information Discovery, you must complete the following steps:

1. Set Access Control, page 15-46 by assigning UMX roles and updating access grants.

2. Schedule Setup for Full Endeca Refresh, page 15-47

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Fixed Assets

As part of the Oracle E-Business Suite-EID integration for the Oracle Fixed Assets application, the following UMX Roles are provided:

UMX Role	Internal Code Name
Fixed Assets Endeca Access Role	UMX|FA_ACCESS_ROLE
Fixed Assets Manager Endeca Access Role	UMX|FA_MGR_ACCESS_ROLE

You must add the new UMX roles 'Fixed Assets Endeca Access Role' (Internal Code Name: UMX|FA_ACCESS_ROLE) and Fixed Assets Manager Endeca Access Role (Internal Code Name: UMX|FA_MGR_ACCESS_ROLE) to enable Endeca menu items for the Fixed Assets Manager responsibility, or any other custom responsibility which is using the same menu. When these UMX roles are assigned to the Fixed Assets Manager responsibility, the menu item *Assets Information Discovery* appears.

If you want to use the Endeca-related roles with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process while you are adding the role to the responsibility.

Fixed Assets includes separate Permissions and Grants for each page. The following are the Fixed Assets Permission Sets and Grants.

Permission Sets	**Internal Code Name**
Fixed Assets Manager Endeca Permission Set	FA_ MGR_ENDECA_ACCESS_PS
Fixed Assets Endeca Permission Set	FA_ENDECA_ACCESS_PS

Grants	**Internal Code Name**
Fixed Assets Manager Endeca Access Grant	FA MGR Endeca Access Grant
Fixed Assets Endeca Access Grant	FA Endeca Access Grant

For assigning UMX roles and grants, refer to Appendic C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Scheduling Setup for Full Endeca Upload or Refresh

The following data sets are included with the Oracle Fixed Assets application:

Data Domain Name	**Purpose**
fa-asset	Stores all assets information regarding asset cost, locations, and aging.
fa-masstrans	Stores all pending mass transaction information.
fa-rec	Stores all account balances from SLA and GL.
fa-clr	Stores all additions pipeline information from Payables and Projects.

The initial data upload for Endeca Fixed Assets is complete when the Full graph is run as described in the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select the graph for schedule to run. I.e. FullLoadConfig.grf.
13. Click Create to set the scheduler.

ETL Parameters for Fixed Assets

You can load data to the Oracle Fixed Assets Data Domain by running graphs provided by Oracle Fixed Assets.

To load data to the Oracle Fixed Assets data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under 'fa'.
2. Graph to load data includes:
   - **FullLoadConfig.grf**: This graph loads meta data and data from all views to the "fa" data domain on the Endeca server.
   - **IncrementalLoadConfig.grf:** This graph updates mass additions information and should be scheduled to run periodically depending on business requirements (monthly, weekly, or daily).

Profile Options for Fixed Assets

There are no profile options in Oracle Fixed Assets Information Discovery.

Views and Joins for Fixed Assets

The following views are used by the ETL layer in Endeca to load Oracle Fixed Assets data to the Endeca Data Domain:

View Name	Purpose
FA_EID_F_ASSET_V	Loads assets data (aging, locations, and assignments)
FA_EID_F_MASS_TRANS_V	Loads pending mass transaction data
FA_EID_REC_V	Loads accounting data for asset accounts from SLA and GL
FA_EID_F_CLR	Loads additions pipeline data from payables and projects

Menus for Endeca Fixed Assets

Oracle Fixed Assets integration includes the following new user menu function:

User Function Name	Function Name
Assets Information Discovery	FA_ENDECA_MAIN

16

Oracle Human Resources Information Discovery Plus

Overview

Oracle Human Resources Information Discovery Plus enables you, as a HR executive, manager or as a member of senior management to identify, measure, prioritize and resolve your day to day HR related business processes or help in formulating strategic decisions. In addition, you will benefit from an improvement in the productivity of HR administrators and line managers, reduce repetitive search actions and result in a seamless completion of business flows. You can use the Workforce Explorer page to search employees by leveraging quick search and guided navigation capabilities. HR users can analyze and interpret person data with the aid of key metrics, maps, tags, flexible charts and graphs. It also provides the ability to navigate to employee personnel actions for performing HR transactions.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Human Resources Information Discovery Plus application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID 2214431.1). You must read this document and make note of the requirements before your installation.

Oracle Human Resources Information Discovery Plus User Interfaces

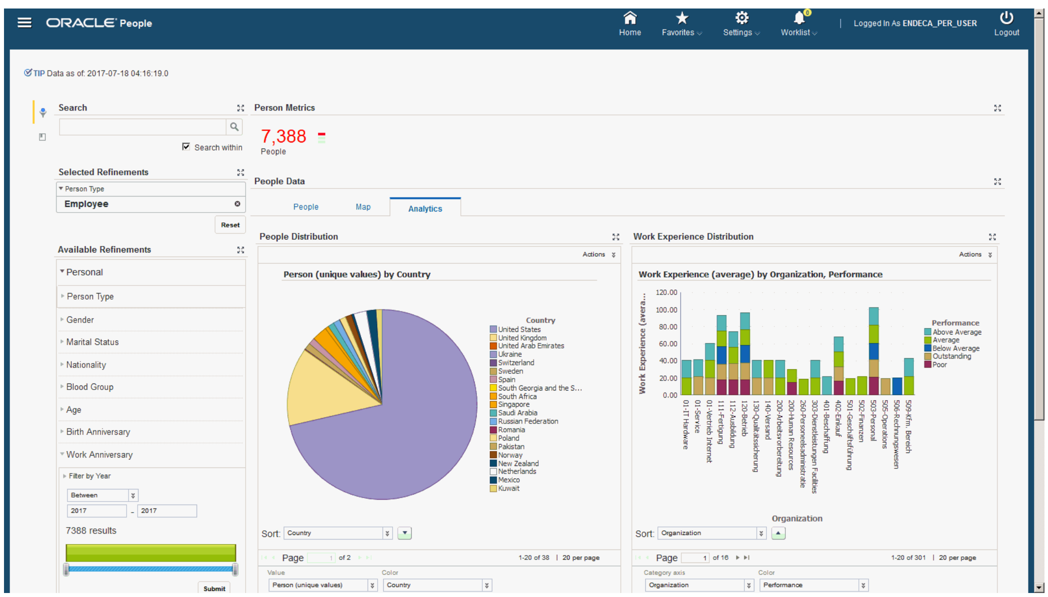
Workforce Explorer

Use the Endeca Workforce Explorer page to search and view dashboard metrics related to person data. The page displays information and data graphically and in tabular format. The following graphic displays a partial view of the Endeca Workforce Explorer page.

From the US Super HRMS Manager, or any other responsibility to which you assigned the Workforce Explorer function, navigate to the Workforce Explorer page:

- (N) People > Workforce Explorer

Within the Endeca Workforce Explorer page, you can search and filter person data. You can analyze the data and review person data using metrics, charts, graphs, and tables. The following describes the Endeca Workforce Explorer page regions and components:



Region	Components
Search • Boolean • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Personal • Work Structure • Assignment • Competency • Compensation

Region	Components
Person Metrics	Displays the number of employees that meet the current search criteria.

Region	Components

People Data	Contains three tabs - People, Map and Analytics. These display the results of a particular search criteria.
	
	• People Tab: This tab contains the following components:
	  • Tags - displays all the unique tags associated with the searched employees and gives you the apability to identify the people based on a particular tag criteria.
	  • Person List - displays the business card view of the searched employees. This is the default view. You can choose to display people details using the carousel view if you prefer.
	  • Compare - use this to compare details of two or more people. HR Administrators or Managers can identify right person or persons to perform a task by providing various combinations of search criteria and identify the best among the potential people by comparing their attributes, like Competency, Work Experience, Latest Performance, etc. All critical and important attributes are available for comparison. Administrator can identify applicable attributes and configure for comparison.
	
	  You can toggle the views, compare details, export, or print the information.
	
	• Map Tab: This tab contains the following component:
	  • Work Location - This enables you to identify the required people using location or geographical areas on a map. This component enables you to use the employee's work location to

Region	Components

	plot the location on the map, making it easy to quickly identify the set of people working in a geographical area. You can search for people working in and around a particular location by using Text Search on the Map. You can also can search for people who are working in a range of locations by using Range filter Search. This component uses the geocode data of locations stored in EBS HR database.
	
	• Analytics Tab: This tab contains the following components:
	  • People Distribution
	  • Work Experience Distribution
	
	Use these graphs to analyze employee data. This provides the holistic view of the employee data, making it easy for senior HR executives senior management to make informed decisions or formulate strategy. Large number of HR attributes are available as dimensions, so you can choose those dimensions for analysis. For example, you can find out the employee distribution across your operating areas or you can find out the employee distribution by combination of Average Work Experience, Organization and Performance. This information can be used to correlate various factors in HRMS domain.
	
	You can also export or print the search results.

Oracle Human Resources Information Discovery Plus Product Configuration

Overview

Complete the Oracle Human Resources Information Discovery Plus product configuration after the installation and common configurations are completed as described in the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8 document* (Doc ID: 2214431.1).

Setting Up Oracle Human Resources Information Discovery Plus

1. Set up the profile option to store Endeca Portal URL.

   See: Profile Options in Oracle Human Resources Information Discovery Plus, page 16-8

2. Set the HR Helpdesk Encryption key generation code with fnd_vault.put as the procedure and HRHD and CRYPT_KEY as the parameters.

   > **Note:** It is mandatory that you set up the HR Helpdesk Encryption key generation code before you run the full load.

3. Add the UMX|PER_ENDECA_PEOPLE_SEARCH_ROLE to any predefined Oracle HRMS responsibility or to any custom Oracle HRMS responsibility. Update the Grant PER_ENDECA_PEOPLE_SEARCH_GRANT and the PER Endeca People Search Permission Set.

   See: *Oracle E-Business Suite System Administrator's Guide* - Security for more information on how to assign roles.

4. Run the Run Tag Concurrent Program.

   See: Running the People Tag Maintenance Concurrent Program, page 16-8.

5. Set the Security Profile Extension to Endeca. Note this Extension list of values is enabled only if the HR: Extension For Endeca profile option is set to Yes.

   See: Setting the Security Profile Extension, page 16-9

6. Run the Populate shared Tables for Person Search concurrent program.

   See: Running the Populate Shared Tables for Person Search Concurrent Program, page 16-9

7. Run the Full Load graph.

   See: Running the Full Load Graph, page 16-10.

8. Set up the Scheduler.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 16-11

Profile Options in Oracle Human Resources Information Discovery Plus

Oracle Human Resources Information Discovery Plus uses the following profile options:

- **FND: Endeca Portal URL** - use this profile option to store the Endeca portal URL. This determines the display of the Endeca page.

- **HR: Extension For Endeca** - set this profile option to Yes at the site level. This profile determines whether HR Information Discovery is enabled or not. The profile also determines the display of the Security Extension Type LOV values in the HR Security Profile window.

- **IRC: Geocode Host** - set this profile option at the site level to provide the URL from where you get the Geo Code details for example http://elocation.oracle.com/elocation/lbs. This profile derives the geo code of the location to display in map. The geocode values like Latitude and Longitude are stored in the hr_locations_all table and is critical for displaying employee work location in the map.

Running the People Tag Maintenance Concurrent Program

Run the People Tag Maintenance concurrent program to collect all tags from the EBS HRMS database and ensure the list in Endeca readable format. Schedule this program at regular intervals, so that the latest tag information is available for Endeca. You must run this concurrent program before the Endeca ETL run. You run this concurrent program from the Submit Requests window.

> **Note:** The tags collected by the People Tag Maintenance Concurrent Program are entered using the Tags window for each person in Oracle HRMS.

To run the People Tag Maintenance Concurrent program:

1. Choose Single Request and click OK.

2. Select People Tag Maintenance as the Request Name.

3. In the Parameters window, enter the following information:
   - Effective Date
   - Business Group
   - Organization (optional)
   - Person (optional)
4. Choose OK.
5. Choose Submit Request. Use the Concurrent Requests Summary window to verify that the concurrent program completed successfully.

Setting the Security Profile Extension

Oracle Human Resources Information Discovery Plus supports both static and dynamic security profiles. To achieve high performance, the application evaluates both types of security profiles and stores them in the PER_SHARED_PERSON_LIST table. This data is loaded to Endeca to ensure that the same HRMS security is applied when users access the Workforce Explorer page.

To set the security profile extension:

1. On the Security Profile page, select the Extension list of values. This LOV is enabled only if the profile HR: Extension For Endeca is set to Yes.
2. Select Endeca as the value. This enables the Populate Shared Tables for Person Search concurrent program to select the security profiles marked as Endeca. The concurrent program converts security profiles to list values and makes it ready for usage in Endeca environment.

   Note: As a best practice it is recommended to mark an optimum number of profiles for this extension. The higher number of security profiles you mark for this extension, the longer the concurrent programs will take to run.

Running the Populate Shared Tables for Person Search Concurrent Program

Run the Populate Shared Tables for Person Search Concurrent Program to process and convert security profiles to list values and make it ready for usage in Endeca environment. Schedule this program to Run at the regular intervals. Run this program before Endeca ETL run to ensure the latest secured records display on the Workforce Explorer page. Use the Submit Requests window to run this program.

To run the Populate Shared Tables for Person Search concurrent program:

1. Choose Single Request and click OK.
2. Select Populate Shared Tables for Person Search as the Request Name.
3. Enter the relevant parameters in the Parameters window.
4. Choose OK.
5. Choose Submit Request. Use the Concurrent Requests Summary window to verify that the concurrent program completed successfully.

Running the Full Load Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Human Resources Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Execute graph from the Task Type list.

12. Select per-search from the Sandbox list.

13. Select graph/FullLoadConfig.grf from the Graph list.

14. Click Create to set the scheduler.

Setting Up the Scheduler to Load Incremental Graphs

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the volume of information requiring update.

To set up the schedule:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler, for example, Human Resources Incremental Load Scheduler.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.

7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Execute graph from the Task Type list.

12. Select per-search from the Sandbox list.

13. Select graph/IncrementalLoadConfig.grf from the Graph list.

14. Click Create to set the scheduler.

ETL Parameters for Oracle Human Resources Information Discovery Plus

You can load data to the per-search data store by running the graphs provided by Oracle Human Resources Information Discovery Plus.

To load data to the per-search data store:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node. The Human Resources extensions sandbox is per-search.

2. Graphs to load data include:

   - **FullLoadConfig graph** - this resets the data domain and loads the attribute configuration from the Endeca FND tables. It also loads the data from the Human Resources Management views.

   - **IncrementalLoadConfig graph** - this loads incremental data from Human Resources Management and attribute configuration from FND, after checking the Last Update Date.

   - **LoadDataFull graph** - this loads the data from Human Resources Management views.

   - **LoadDataIncr graph** - this loads the incremental data from Human Resources Management views after checking for Last Update Date.

Views and Joins in Oracle Human Resources Information Discovery Plus

The following views are used by the ETL layer in Oracle Endeca to load and display Oracle Human Resources Information Discovery Plus data to the Oracle Endeca data store:

- PER_EID_PEOPLE_V - is the view to load master people details.

- PER_EID_ASSIGNMENT_V - is the view to load assignment details

- PER_EID_ADDRESS_V - is the view to load address details

- PER_EID_PHONE_V - is the view to load phone details

- PER_EID_TAG_V - is the view to load tag details

- PER_EID_PERFORMANCE_V - is the view to load performance details

- PER_EID_COMPETENCY_V - is the view to load competency details
- PER_EID_QUALIFICATION_V - is the view to load qualification details

Grants in Oracle Human Resources Information Discovery Plus

Grant Name - PER_ENDECA_PEOPLE_SEARCH_GRANT

Grantee Type - Group of Users

Grantee - PER Endeca People Search

Permission Sets in Oracle Human Resources Information Discovery Plus

Permission Set Name - PER Endeca People Search Permission Set

Permission Set Code - PER_ENDECA_PEOPLE_SEARCH_PS

Permissions Included - PER_ENDECA_PEOPLE_SEARCH (PER Endeca People Search Permission)

17

Oracle Installed Base Information Discovery Plus

This chapter covers the following topics:

- Overview
- Item Instance Overview Page
- Oracle Installed Base Information Discovery Plus Product Configuration
- Setting Up Oracle Installed Base Information Discovery Plus Product Configuration
- Setting Up Oracle Installed Base Information Discovery Plus Profile Options
- Scheduling the Full Load Configuration Graph
- Setting Up the Scheduler to Load Incremental Graphs
- Roles in Oracle Installed Base Information Discovery Plus
- Permission Sets in Oracle Installed Base Information Discovery Plus
- Views and Joins to Load Oracle Installed Base Information Discovery Plus
- Menus and Functions in Oracle Installed Base Information Discovery Plus

Overview

You can use Oracle Installed Base Information Discovery Plus to search and filter details such as Up-Sell and Cross-Sell opportunities, search by geographical location of Installed Base, and also search for customer products such as Model/Configuration. Oracle Installed Base Information Discovery displays the most critical data in a single location and drill down to get more detailed information enabling you to take action using that information. You use these dashboards to review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

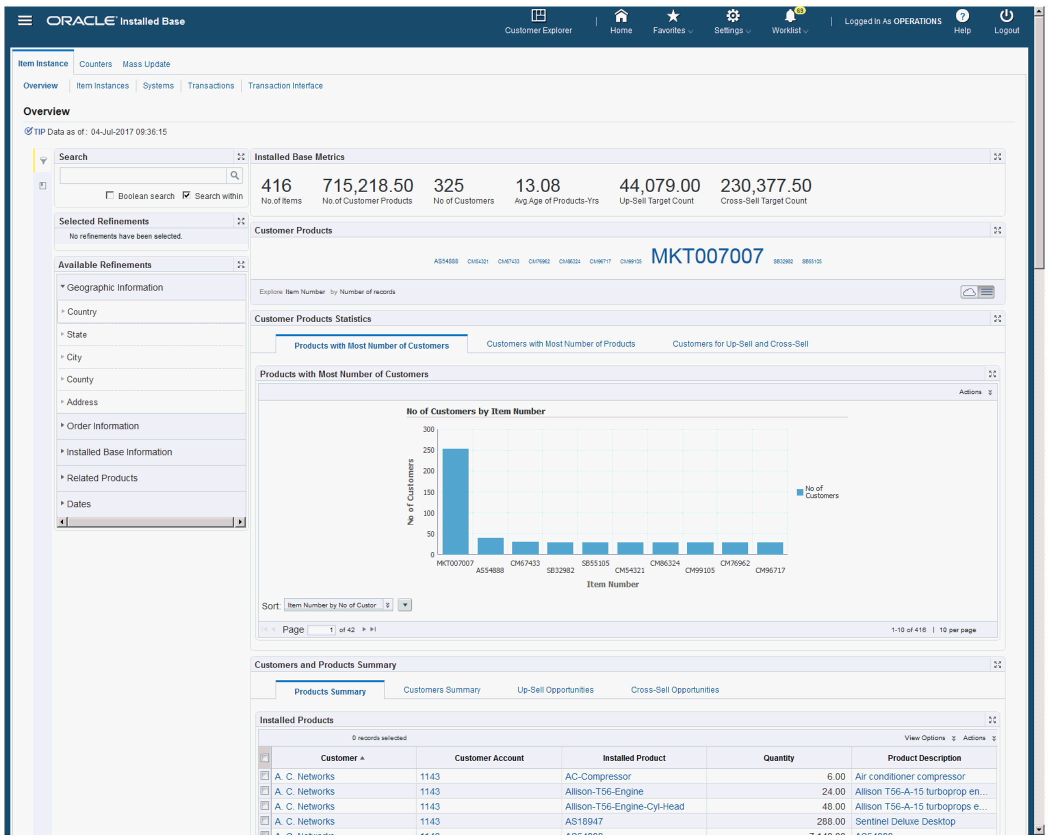
You can search using Oracle Installed Base Information Discovery Plus pages and

Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS.

Oracle Installed Base Information Discovery Plus User Interface and Integration

Item Instance Overview Page

The Item Instance Overview page enables you to search for all customer products by geography, get Up-sell and Cross-Sell opportunity details for Installed Base products, identify customer products belonging to a Model/Configuration and identify customer products by key attribute values. The page displays information and data graphically and in tabular format.



Region	Components
Tip	Date on which data was last refreshed

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Search
Boolean
Search Within</td><td>The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.

Partial record search is enabled for specific attributes. Attributes for partial record search include:
Address
Operating Unit
Customer
Item Number
Item Description
Item Instance
Serial Number
Order Number
Ship To Location
Bill To Location
Warehouse
Owner Name</td></tr>
</table>

Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Geographic Information • Order Information • Installed Base Information • Related Products • Dates
Installed Base Metrics	• No. of Items • No of Customer Products • No of Customers • Avg. Age of Products-Yrs • Up-Sell Target Count • Cross-Sell Target Count
Customer Products	This tag cloud displays the distribution of all customer products.

Region	Components

Customer Product Statistics	This regions consists of three tabs, each of which display information in a graphical format:
	• Products with Most Number of Customers
	    • No. of Customers by Product
	• Customers with Most Number of Products
	    • No. of Products by Customer
	• Customers for Up-Sell and Cross-Sell
	    • Customers for Up-Sell: - No. of Up-Sell Items by Customer
	    • Customers for Cross-Sell: - No. of Cross-Sell Items by Customer

Region	Components

Customers and Product Summary	This region consists of four tabs:
	• Products Summary
	  • Customer
	  • Customer Account
	  • Installed Product
	  • Product Description
	  • Quantity
	• Customers Summary
	  • Customer
	  • Customer Account
	  • Customer Type
	  • Classification
	  • Contact Type
	  • Contact Number
	• Up-Sell Opportunities
	  • Customer
	  • Customer Account
	  • Installed Product
	  • Quantity
	  • Up-Sell Product
	• Cross-Sell Opportunities
	  • Customer

Region	Components
	• Customer Account • Installed Product • Quantity • Cross-Sell Product You can also export or print these details using the Actions List of Values.

Region	Components
Installed Base Details	Displays details of the Installed Base as follows: • Item • Item Description • Instance • Quantity • Serial • Lot • Status • Order Number • Customer • Customer Account • Start Date • Top Model Item • Instance Flexfield Click any of the available links to refine your results further using that selection. You can also export or print these details using the Actions List of Values.

Oracle Installed Base Information Discovery Plus Product Configuration

Oracle Installed Base Information Discovery Plus Product Configuration

Once you have completed installation and common configurations as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), you must complete the Oracle Installed Base Information Discovery Plus product configuration setup as detailed in this section.

Setting Up Oracle Installed Base Information Discovery Plus Product Configuration

To set up Oracle Installed Base Information Discovery Plus Product Configuration, complete the following steps:

1. Grant the CSI_ENDECA_ACCESS_ROLE (CSI Endeca Access Role) to any predefined or custom Installed Base responsibility.

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1) for more information on roles in Oracle E-Business Suite Information Discovery.

2. Set up profile options.

   See: Setting Up Oracle Installed Base Information Discovery Plus Profile Options, page 17-10

3. Schedule and run the Full Load Configuration Graph.

   See: Scheduling the Full Load Configuration Graph, page 17-11

4. Schedule the set up for Incremental Endeca Refresh.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 17-12

Setting Up Oracle Installed Base Information Discovery Plus Profile Options

Set up the following profile options for Oracle Installed Base Information Discovery Plus:

- **CSI : Endeca Customer Instances Data Load Start Date (mm/dd/yyyy)** - Use this profile option to load all the Item Instances created on and after the specified date to Endeca Data Store.

- **CSI Endeca: Load Extended Attributes** - Use this profile option to decide if the application should load the extended attributes for instances. You can choose between Yes and No.

- **CSI Endeca: Load Flex fields** - Use this profile option to decide if the application should load the flexfield values for Item Instances. You can choose between Yes and No.

- **CSI Endeca: Load Up-Sell Product and Cross-Sell Product** - Use this profile option to decide if the application should load the up-sell and cross-sell products information for Customer Products. You can choose between Yes and No.

Scheduling the Full Load Configuration Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run the Full Load Configuration Graph:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler, for example, Installed Base Full Load Scheduler.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.

7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Execute graph from the Task Type list.

12. Select csi-inst from the Sandbox list.

13. Select graph/FullLoadConfig.grf from the Graph list.

14. Click Create to set the scheduler.

Setting Up the Scheduler to Load Incremental Graphs

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), initial data load for Oracle Installed Base Information Discovery is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the volume of information requiring update.

To set up the scheduler:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler, for example, Installed Base Incremental Load Scheduler.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.

7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Start a graph from the Task Type list.

12. Select csi-inst from the Sandbox list.

13. Select graph/IncrementalLoadConfig.grf from the Graph list.

14. Click Create to set the scheduler.

Technical Integration Components

Roles in Oracle Installed Base Information Discovery Plus

- Role Name: CSI Endeca Access Role:
- Code: CSI_ENDECA_ACCESS_ROLE

Permission Sets in Oracle Installed Base Information Discovery Plus

- Permission Set Name- CSI Endeca Access Permission Set
- Permission Set Code - CSI_ENDECA_ACCESS_PS
- Permissions Included in the Set: CSI Endeca Customer Instances Landing Page (CSI_ENDECA_CUST_INST_LANDING_PAGE) and CSI Endeca Customer Instances Page Destination (CSI_ENDECA_CUST_INST_DEST)

Views and Joins to Load Oracle Installed Base Information Discovery Plus

The following views are used by the ETL layer in Oracle Endeca to load and display Oracle Installed Base Information Discovery Plus data to the Oracle Endeca data store:

- CSI_EID_CUSTOMER_INSTANCES_V - View to load Item Instances data for Customer owned items.

Menus and Functions in Oracle Installed Base Information Discovery Plus

The following functions are available for the Item Instance Navigation Menu Agent User menu (CSI_ITEM_INSTANCE_NAV_MENU_AU) in Oracle Installed Base Information Discovery Plus:

Function Code	User Function Name	Function Type	Web HTML Call
CSI_ENDECA_CUST_INST_DEST	CSI Endeca Customer instances search page	JSP	Require input here
CSI_ENDECA_CUST_INST_LANDING_PAGE	CSI Endeca Customer Instances Landing Page	JSP	Require input here

18

Oracle Incentive Compensation Information Discovery Plus

This chapter covers the following topics:

Overview

Oracle Incentive Compensation Information Discovery Plus enables you to search and filter incentive compensation related information. Using Oracle Incentive Compensation Information Discovery Plus, you can:

- Minimize overpayment by:
  - Incorporating quality assurance processes across all phases of compensation

processing

  - Rapidly reacting to quality issues
  - Transparently viewing the lifecycle of a transaction

- Improve sales morale for increased sales by:
  - Proactively removing pay obstacles
  - Reducing pay delays
  - Faster, User Friendly Disputes Resolution

You can search using Oracle Incentive Compensation Information Discovery Plus (EID) design tools. These pages are hosted in an EID environment, and called from container pages in EBS.

Lifecycle Statuses

Oracle Incentive Compensation (OIC) Information Discovery Plus enriches transactions with lifecycle attributes that combine multiple statuses to reflect what has how a transaction has been processed in OIC in a single glance.

There are 4 lifecycle attributes; one for each for collect, calculate and pay phase; and a single concatenated lifecycle status across all phases.

Lifecycle attributes include:

1. Collect Lifecycle
2. Calc Lifecycle
3. Pay Lifecycle
4. Lifecycle Status = Collect Lifecycle + Calc Lifecycle + Pay Lifecycle

   For example, a paid transaction has lifecycle status COLLECT: Collected -> Loaded -> CALC: Calculated -> Posted -> PAY: Approved -> Paid. A paid manual transaction has lifecycle status: COLLECT: -> CALC: -> Calculated -> Posted -> PAY: Approved -> Paid. An unpaid commission earning: COLLECT: Collected -> Loaded -> CALC: Calculated -> Unposted.

Lifecycle or Status Name	Data Group	Comments
API Load Status	Interface Processing	CN_COMM_LINES_API. LOAD_STATUS

Lifecycle or Status Name	Data Group	Comments
API Adj Status	Interface Processing	CN_COMM_LINES_API. ADJUST_STATUS
Collect Lifecycle	Interface Processing	DECODE (CN_COMM_LINES_API. TERR_ID,NULL,'Collected', 'Credited') + '->' + CN_COMM_LINES_API. LOAD_STATUS
Status	Transaction Processing	NVL (CN_COMMISSION_HEADERS.STATUS, CN_COMMISSION_LINES. STATUS)
Posting Status	Transaction Processing	CN_COMMISSION_LINES. POSTING_STATUS
Calc Lifecycle	Calculation Processing	Status + Posting Status
Paysheet Status	Paysheet Processing	CN_PAYMENT_WORKSHEETS.STATUS
Payrun Status	Payrun Processing	CN_PAYRUNS.STATUS
Pay Lifecycle	Paysheet Processing	Paysheet Status + Payrun Status
Lifecycle Status	Transaction Processing	Collect Lifecycle + Calc Lifecycle + Pay Lifecycle

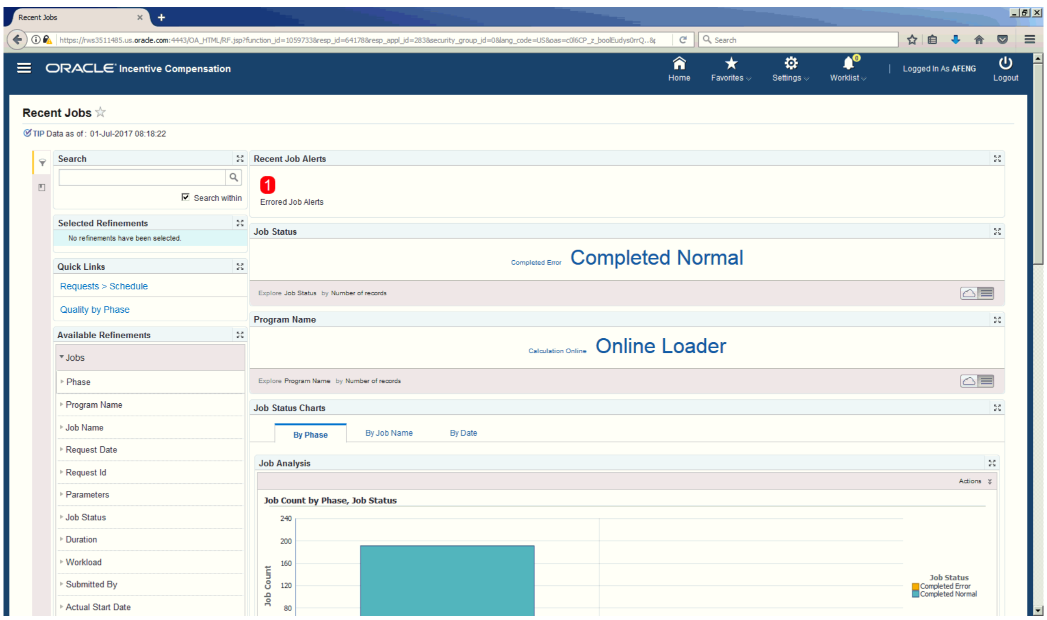
Oracle Incentive Compensation Information Discovery Plus User Interface

Recent Jobs Dashboard

OIC processing is very job centric. You kick off jobs for collection, for load, for calculation, and for creating paysheets.

The Recent Jobs dashboard is for compensation analysts or managers, and is an OIC processing centric workbench for managing and assessing these batch and online jobs. It brings together information from concurrent manager, online jobs across all phases into a single actionable dashboard.

You can analyze data using various metrics, charts, graphs, and tables.



Phase	Program Name
Collect	• Generate Collection Packages • Collection Orders • Transaction Interface Loader • Load Online • Credit Allocation
Calculate	• Calculation • Calculation Online
Pay	• Create Worksheets • Approve Payrun • Delete Unpaid Payrun
Others	Open Periods

The Recent Jobs dashboard contains the following regions and components:

Region	Components
Tip	Displays the date on which the data was last refreshed.

Region	Components
Search • Boolean Search • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Plan Elements • Product
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Quick Links	The Quick Links region displays links to associated pages. • Requests > Schedule – use this quick link to navigate to the Schedule Request: Define page to define or manage a schedule request. • Quality by Phase – use this quick link to navigate to the Quality by Phase page
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Jobs • Periods
Recent Job Alerts	This metrics displays Errored Job Alerts.
Job Status	This tag cloud displays the job status by number of records.
Program Name	This tag cloud displays the program name by number of records.
Job Status Charts	Contains 3 tabs: • By Phase – displays Job Analysis which displays Job Count by Phase and Job Status • By Job Name – displays Job Count by Job Status and Job Name • By Date – displays Job Count by Request Date and Job Status

Region	Components
Recent Job Results	Displays: • Req Log • Calc Log • Validate Trx (Validate Transaction) • Job Name • Job Status • Program Name • Request Date • Job Type • Completion Message • Workload • Duration • Parameters • Start Date • End Date • Submitted By Click any of the links to refine your search results further by that value. You can use the Actions menu to Print or Export the results. Additionally, you can compare the results of two or more rows using the Compare action.

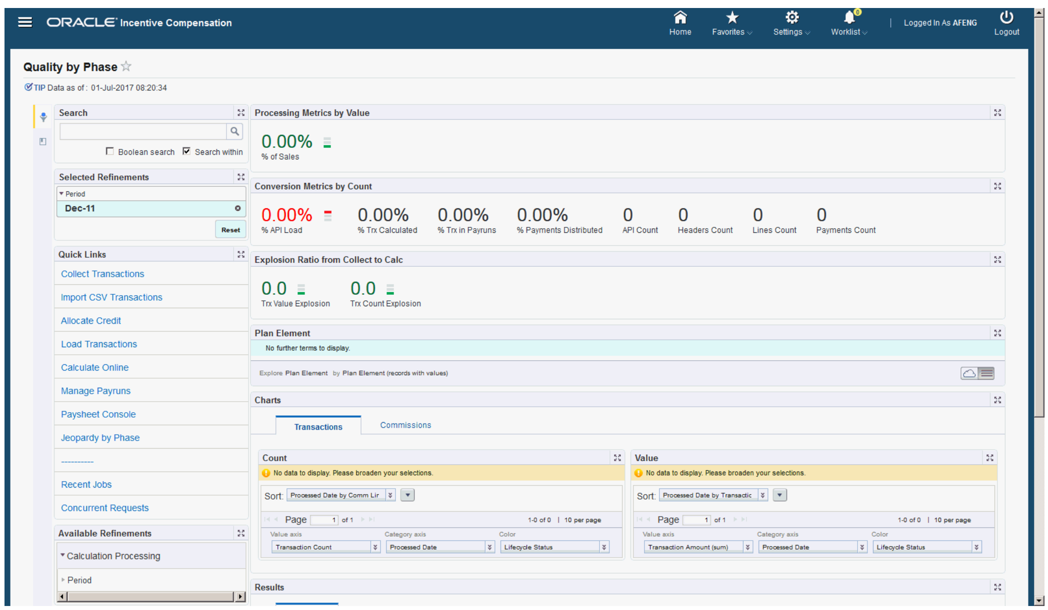
Quality by Phase Dashboard

OIC processing is very sequential. In assessing the completeness and accuracy of calculated earnings, collection must be validated prior to load, load must be validate prior to calculation. In other words, the quality of each phase is predicated on the success of its prior phases.

The Quality by Phase dashboard is for compensation analysts or managers, and is an OIC processing centric workbench for managing and assessing the completeness & accuracy of each phase of OIC processing. It links together transactional information from all phases of processing (collect, calc, pay) into a single actionable dashboard so quality of the processing can be assessed.

The same dashboard is used to research disputes. As a Compensation Analyst or Manager, you need to research disputes, understand the depth and breadth of root cause and provide appropriate resolution. A single dispute can be isolated to a single representative or may be the tip of the iceberg. As disputes are resolved, their attributes and outcomes can filtered to discover similarities across all disputes. Refine by attributes of transactions under dispute. Quickly validate how transactions were processed via the Lifecycle Status. Identify discrepancies associated to the dispute. If the source of the dispute can affect others, alter refinements to discover the source and scope of the issue; before taking action to rectify the situation.

You can analyze data using various metrics, charts, graphs, and tables. The Quality by Phase page contains the following regions and components:



Region	Components
Tip	Displays the date on which the data was last refreshed.

Region	Components
Search • Boolean Search • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Plan Elements • Product
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Region	Components
Quick Links	The Quick Links region displays links to associated pages. • Collect Transactions – click this quick link to navigate to the Collect Transactions page • Import CSV Transactions - click this quick link to navigate to the Import/Export page • Allocate Credit - click this quick link to navigate to the Credit Allocation page • Load Transactions - click this quick link to navigate to the Load Transactions page • Calculate Online - click this quick link to navigate to the Calculation Requests page • Manage Payruns - click this quick link to navigate to the Payment Batches page • Paysheet Console - click this quick link to navigate to the Paysheet Console page • Jeopardy by Phase - click this quick link to navigate to the Jeopardy by Phase page • Recent Jobs - click this quick link to navigate to the Recent Jobs page • Concurrent Requests - click this quick link to navigate to the Schedule Request: Define page
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute group Calculation Processing to view and select attribute names.
Processing Metrics by Value	Displays: • % of Sales - displays the total commission as a percentage of Total Transaction Value • Total Commission - displays the sum of earnings from CN lines • Total Transaction Value - displays the sum of transaction amount from CN Lines • Total Paysheet Value - displays the sum of pay amount from paysheets

Region	Components
Conversion Metrics by Count	Displays: • % API Load – displays the percentage of interface transactions loade • % Trx Calculated – displays the percentage of transactions calculated • % Trx in Payruns - displays the percentage of earned transactions have been picked up in payruns (of any status) • % Payments Distributed - displays the percentage of payments belong to distributed payruns • API Count - displays the count of interface transactions • Headers Count - displays the count of transaction headers • Lines Count - displays the count of transaction lines • Payments Count - displays the count of payments
Explosion Ratio from Collect to Calc	Displays: • Trx Value Explosion (Transaction Value Explosion) – displays the multiplication factor of sum of transaction amount from interface to transactions (commission lines) • Trx Count Explosion (Transaction Count Explosion) – displays the multiplication factor of count of transactions from interface to transactions (commission lines)
Plan Element	This tag cloud displays plan element by plan elements (records with values)

Region	Components

Charts	Contains 2 tabs:
	• Transactions – displays the following:
	  • Count
	  • Value
	• Commissions – displays the following:
	  • Validate by Commissions Calculated
	  • Validate by Max

Region	Components

Results	Displays 5 tabs:
	• Collect – choose between Interface Transaction and Interface Processing from the list of values.
	  • Interface Transaction – displays API Salesrep, API Invoice Date, API Transaction Amount, API Quality, API Customer, API Order Number, API Invoice Number, and API Employee Number
	  • Interface Processing – displays API Salesrep, API Invoice Date, API Transaction Amount, API Quality, API Customer, API Order Number, API Invoice Number, and Collect Lifecycle
	• Calculate – choose between Transaction, Calculation Processing, Product, Plan, Sales Credit, and Customer from the list of values.
	  • Transaction – displays Edit Transaction, Credit Receiver, Processed Date, Transaction Amount, Commission Amount, Commission Rate, Quantity, and Processed Date
	  • Calculation Processing – displays Edit Transaction, Credit Receiver, Processed Date, Transaction Amount, Commission Amount, Commission Rate, Quantity, and Comm Header ID
	  • Product - displays Edit Transaction, Credit Receiver, Processed Date, Transaction Amount, Commission Amount, Commission Rate, Quantity, and Products
	  • Plan – displays Edit Transaction,

Region	Components

	Credit Receiver, Processed Date, Transaction Amount, Commission Amount, Commission Rate, Quantity, and Plan
	• Sales Credit – displays Edit Transaction, Credit Receiver, Processed Date, Transaction Amount, Commission Amount, Commission Rate, Quantity, and Original Credit Receiver
	• Customer - displays Edit Transaction, Credit Receiver, Processed Date, Transaction Amount, Commission Amount, Commission Rate, Quantity, and Bill to Contact
	• Payment – choose between Payment, Payment Processing, and New Set from the list of values..
	  • Payment – displays Payment Payee, Payment Plan Element, Payment Payrun Name, Payment Credited Salesrep, Payment Payee, Payment Role, and Payment Incentive Type
	  • Payment Processing – displays Payment Payee, Payment Plan Element, Payment Payrun Name, Pay Lifecycle, Lifecycle Status, Payment Payrun Name, and Payment Transaction ID
	  • New Set – displays Payment Payee, Payment Plan Element, Payment Amount, Payment Payrun Name, and Payment Plan
	• Paysheet – choose between Paysheets and Paysheet Processing from the list of values.

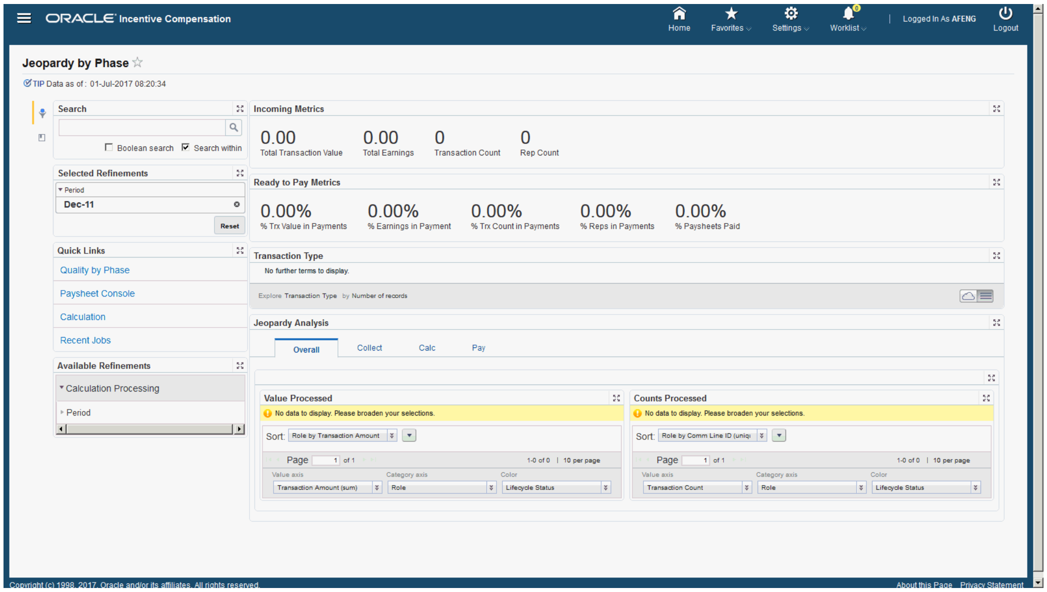
Region	Components
	• Paysheets – displays Paysheet Detail, Payrun Name, Paysheet Salesrep, Paysheet Total, Paysheet Note, Paysheet Earnings, Paysheet Current Earnings Due, Paysheet Held Amount • Paysheet Processing – displays Paysheet Detail, Payrun Name, Paysheet Salesrep, Paysheet Total, Paysheet Note, Paysheet Earnings, Paysheet Current Earnings Due, Paysheet Held Amount • Payrun – displays Payrun Summary, Payrun Name, Payrun Note, Payrun Name, Payrun Status, Payrun Run Date, Payrun Run Period, and Payrun Pay Interval Click any of the links to refine your search results further by that value. You can use the Actions menu to Print or Export the results. Additionally, you can compare the results of two or more rows using the Compare action.

Jeopardy by Phase Dashboard

The Jeopardy by Phase dashboard is for finance directors or comp managers typically responsible for getting incentives paid on time, and is a workbench for assessing whether incentives processing is on schedule to complete on time; and to take corrective action if necessary. It is a more metrics oriented dashboard that helps to assess compensation administration's readiness to pay. Where Quality by Phase focuses on conversion between phases, Jeopardy by Phase focuses on readiness to pay. This helps to ensure timely incentive payments by providing insight for remedial decision making including:

- Number of payees and payee communities in jeopardy
- Monies in jeopardy
- Pay components in jeopardy

You can analyze data using various metrics, charts, graphs, and tables. The Jeopardy by Phase page contains the following regions and components:



Region	Components
Tip	Displays the date on which the data was last refreshed.

Region	Components
Search • Boolean Search • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Plan Elements • Product
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Quick Links	The Quick Links region displays links to associated pages. • Quality by Phase – click this quick link to navigate to the Quality by Phase page • Paysheet Console - click this quick link to navigate to the Paysheet Console page • Calculation - click this quick link to navigate to the Calculation Requests page • Recent Jobs - click this quick link to navigate to the Recent Jobs page

Region	Components
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute group Calculation Processing to view and select attribute names.
Incoming Metrics	Displays: • Total Transaction Value - sum of transaction amount from transaction records • Transaction Count - count of transaction records where commission amount is greater than or less than zero • Rep Count - count of unique reps from transaction records where commission amount is greater than or less than zero

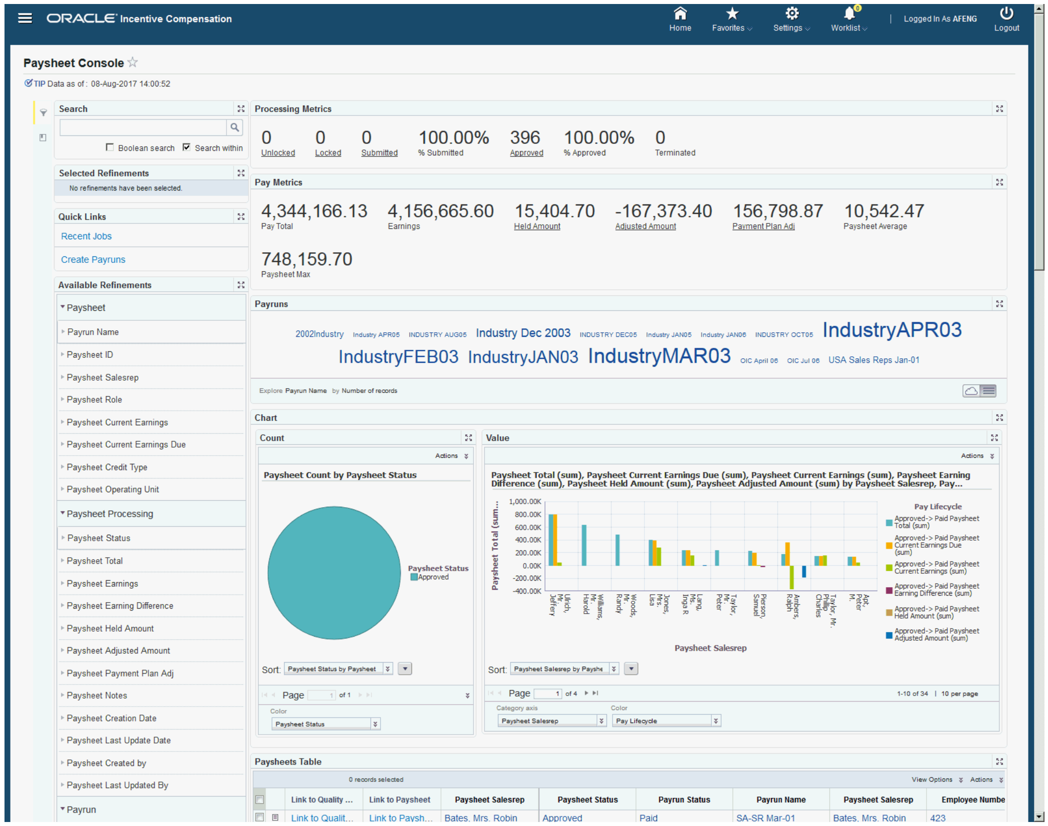
Region	Components
Ready to Pay Metrics	Displays: • % Trx Value in Payments - percentage of total transaction amount represented in payments out of all transaction records with commission earnings • % Trx Count in Payments - percentage of transaction count represented in payments out of all transaction records with commission earnings • % Reps in Payments - percentage of reps represented in payments out of all transaction records with commission earnings • % Paysheets in Payments - percentage of paysheets belonging to paid payruns
Transaction Type	This tag cloud displays transaction types by number of records.

Region	Components
Jeopardy Analysis	Displays the following tabs: • Overall – displays Value Proceed and Counts Proceed charts. Value Proceed displays Transaction Amount (sum) by Role and Lifecycle Status. Counts Proceed displays Transaction Count by Role and Lifecycle Status • Collect – displays Value Proceed and Counts Proceed charts. Value Proceed displays Transaction Amount (sum) by Role and Collect Lifecycle. Counts Proceed displays API Count by Role and Collect Lifecycle • Calc – displays Value Proceed and Counts Proceed charts. Value Proceed displays Commission Amount (sum) by Role and Calculation Lifecycle. Counts Proceed displays Transaction Count by Role and Calculation Lifecycle • Pay – displays Value Proceed and Counts Proceed charts.

Paysheet Console

The Paysheet Console provides visibility across payruns and supports a more flexible approval process. As a Compensation Analyst/Manager or Finance Director responsible for payment processing, you need to see how the paysheet processing is progressing for current period(s), review paysheets, how many outstanding paysheets assigned to which analysts. This dashboard, in particular, provides the ability to see across different payruns. This is also used to review submitted paysheets prior to approval in OIC.

You can analyze data using various metrics, charts, graphs, and tables. The Paysheet Console page contains the following regions and components:



Region	Components
Tip	Displays the date on which the data was last refreshed.

Region	Components
Search • Boolean Search • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • Plan Elements • Product
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Quick Links	The Quick Links region displays links to associated pages. • Recent Jobs - click this quick link to navigate to the Recent Jobs page • Create Payruns - click this quick link to navigate to the Payment Batches page
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.
Processing Metrics	Displays: • #Unlocked – total of unpaid paysheets • #Unsubmitted – total of locked paysheets • #Unapproved – total of submitted paysheets • % Submitted – percentage of submitted paysheets • #Terminated – number of terminated sales representatives
Pay Metrics	Displays: • Pay Total – sum of paysheet total • Held Total – sum of paysheet held amount • Earnings Adjusted – sum of paysheet adjusted amount • Pay Adjusted – sum of paysheet payment plan adjustment • Paysheet Average – average of paysheet total • Paysheet Max – maximum paysheet total
Payruns	This tag cloud displays Payrun Name by number of records.

Region	Components
Chart	Displays: • Count – displays Paysheet Count by Paysheet Status • Value – displays Payment Total (sum), Paysheet Current Earnings Due (sum), Paysheet Current Earnings (sum), Payment Diff (sum), Paysheet Held Amount (sum), and Paysheet Pay Amount Adjustment (sum) by Paysheet Salesrep.
Paysheets Table	Displays: • Link to Quality by Phase • Link to Paysheet • Paysheet Salesrep • Paysheet Status • Payrun Status • Payrun Name • Paysheet Salesrep • Employee Number Click any of the links to refine your search results further by that value. You can use the Actions menu to Print or Export the results. Additionally, you can compare the results of two or more rows using the Compare action.

Oracle Incentive Compensation Information Discovery Plus Product Configuration

Overview

Complete the Oracle Incentive Compensation Information Discovery Plus product configuration after the installation and common configurations are completed as described in the *Installing Oracle E-Business Suite Information Discovery,Release 12.2 V8* document (Doc ID: 2214431.1).

Set up Oracle Incentive Compensation Information Discovery Plus

1. Grant the OIC CM Endeca Access Role (CN_ICM_ENDECA_ACCESS_ROLE) to the predefined Compensation Analyst or Compensation Manager responsibilities. You can also grant the Role to any custom Oracle Incentive Compensation custom responsibility.

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: Roles in Oracle Incentive Compensation Information Discovery Plus, page 18-28

2. Set up the Profile Option.

   See: Setting Up Oracle Incentive Compensation Information Discovery Plus Profile Option , page 18-27

3. Run the Full Load Graph.

   See: Running the Full Load Graph , page 18-28

4. Set up the Scheduler.

   See: Setting Up the Scheduler for Incremental Refresh , page 18-29

Setting Up Oracle Incentive Compensation Information Discovery Plus Profile Option

Set up the following profile option for Oracle Incentive Compensation Information Discovery Plus:

- **OIC: Endeca Database View Periods** - Use this profile option to set the period range before you run any ETL load. You must set the Start Period ID and the End

Period ID to specify the period.

Roles in Oracle Incentive Compensation Information Discovery Plus

To access the Oracle Incentive Compensation Information Discovery Plus Application, grant the OIC CM Endeca Access Role (UMX|CN_ICM_ENDECA_ACCESS_ROLE) to users, who require access to Information Discovery content. Users with this role can access the Information Discovery pages from the predefined Compensation Manager responsibility. You can also assign the role to any other custom responsibility.

- **Role Name**: OIC CM Endeca Access Role (UMX|CN_ICM_ENDECA_ACCESS_ROLE)
- **Permission Set Code**: CN_ICM_ENDECA_ACCESS_PS
- **Responsibility Code:** FND_RESP|CN|CN_INC_COMP_MANAGER|STANDARD

Running the Full Load Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery*, *Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes.

We recommend you do not run the full load periodically. You should run it once after set up and whenever you update the OIC: Endeca Database View Periods profile option.

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Incentive Compensation Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select cn-cp or cn-trx from the Sandbox list, based on the application for which you are running the full load.
13. Select graph/Full.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler for Incremental Refresh

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery*, *Release 12.2 V8* document (Doc ID: 2214431.1)), initial data load for Oracle Incentive Compensation Information Discovery Plus is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Incentive Compensation Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.

12. Select cn-cp or cn-trx from the Sandbox list, based on the application for which you are running the full load.

13. Select graph/Incremental.grf from the Graph list.

14. Click Create to set the scheduler.

Technical Integration Components

View and Joins to Load Oracle Incentive Compensation Information Discovery Plus Data

The following views are used by the ETL layer in Endeca to load and display Oracle Incentive Compensation Information Discovery data to the Oracle Endeca data store:

- CN_EID_CR - View to extract Recent Jobs data.
- CN_EID_V1 - View to extract Quality by Phase, Paysheet Console, and Jeopardy by Phase data.

19

Oracle Inventory Management Information Discovery Plus

This chapter covers the following topics:

Overview

You can use Oracle Inventory Management Information Discovery Plus to quickly search, filter, and compare item information across organizations and related entities. Using the Inventory Management Information Discovery Plus pages, you can review and analyze data using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using Inventory Management pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS. In Oracle Inventory Management, the following pages enable search functions using Endeca Information Discovery integration:

- **Item Master Search Page:** The Item Master Search page displays several regions and components with enhanced navigation that enables you to search, filter, and compare item information.

- **Plan Fulfillment Page:** You can use the Plan Fulfillment page to plan fulfillment batches and view unfulfilled details including late, early, on time, and so on. You can also view details and order lines that do not have adequate on-hand inventory and take appropriate actions such as updating or deleting the reservation, and release a picking batch.

- **Track Fulfillment Page:** You can use the Track Fulfillment page to track the fulfillment process and react in real time to changes impacting the delivery activities. You can monitor for delivery exceptions, holds and interface activity, and take appropriate actions to expedite the fulfillment.

- **Space Utilization Page:** You can use the Space Utilization page to track fragmentation and take appropriate actions to consolidate material within Inventory. You can also find velocity mismatch with respect to transaction counts and quantities, and take appropriate actions to consolidate the material within Inventory.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Inventory Management Information Discovery Plus application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

> **Note:** Oracle Item Information Discovery is not supported for Oracle Product Hub.

Oracle Inventory Management Information Discovery Plus User Interface

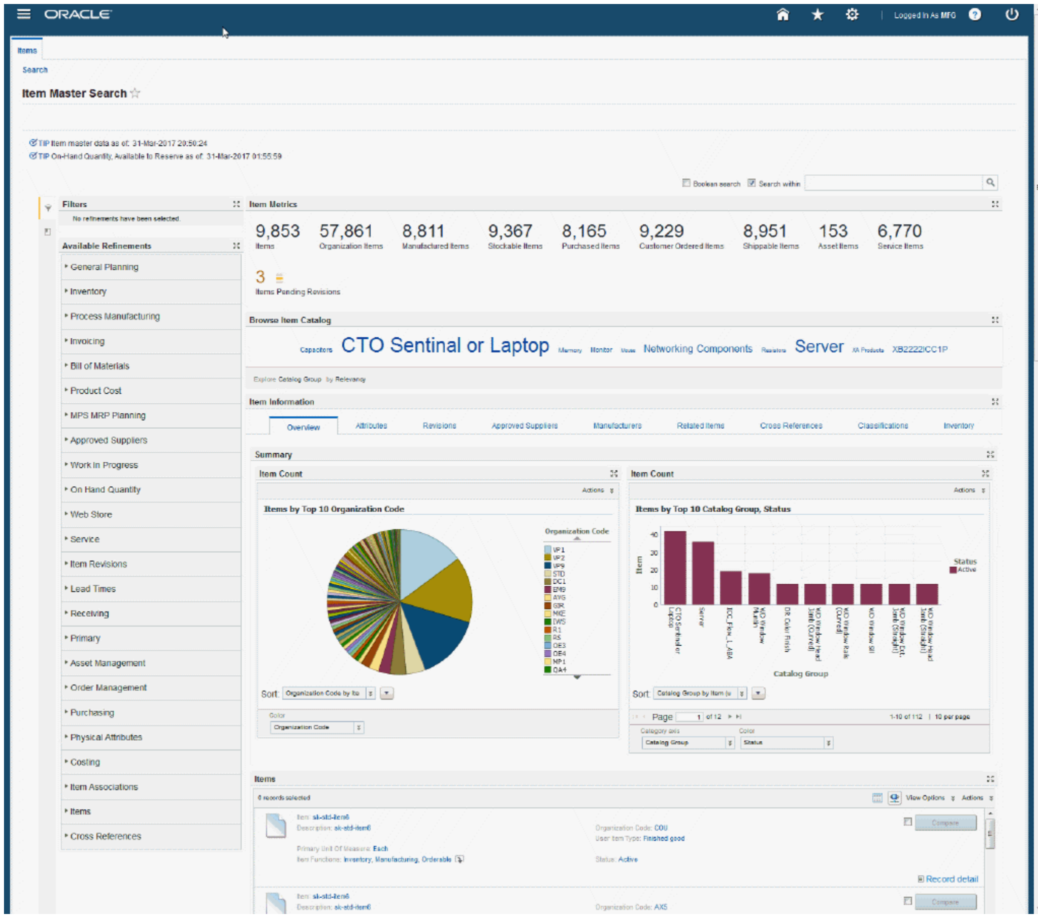
Item Master Search Page

The Item Master Search page displays several regions and components with enhanced navigation. The following is a partial display of the Item Master Search page.

From the Inventory responsibility, navigate to the Item Master Search page:

(N) Items > Item Information Discovery

> **Note:** You can also navigate to the Item Master Search page from the work orders results table in the Discrete Work Order Search page using Endeca Quick Links.



Within the Item Master Search page, you can search and filter item information. You can analyze the data and review item metrics, charts, graphs, and tables. The following describes the Item Master Search page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. You can also view 'Items' Descriptive Flexfield values from Available Refinements. Expand the following attribute groups to view and select attribute names: You can also view 'Items' Descriptive Flexfield values from Guided Navigation. • General Planning • Inventory • Process Manufacturing • Invoicing • Bill of Materials • Product Cost • MPS MRP Planning • Approved Suppliers • Work In Progress • On-Hand Quantity • Web Store • Service • Manufacturers • Customer Item Cross References • Item Revisions • Lead Times • Receiving

Region	Components
	• Primary • Asset Management • Order Management • Purchasing • Physical Attributes • Costing
Summarization Bar (metrics)	• Items • Organization Items • Manufactured Items • Stockable Items • Purchased Items • Customer Ordered Items • Shippable Items • Asset Items • Service Items • Items Pending Revisions (color coding configurable)
Browse Item Catalog (tag cloud component)	Top Ten Items Tag Cloud Component **Note:** The Browse Item Catalog tag cloud component displays the top ten items by frequency of occurrence.

Region	Components

Item Information (tabbed component container)
 	
Overview (tab)
	Summary (component container)
	
	Item Count (pie chart)
	• Sort Options
	  ◦ Organization Code
	  ◦ Organization Code by Item (unique values)
	• Series Dimensions (color)
	  ◦ Organization Code (default)
	  ◦ Status
	
	Item Count (bar chart)
	• Sort Options
	  ◦ Catalog Group
	  ◦ Catalog Group by Item (unique values)
	• Dimensions (category axis)
	  ◦ Catalog Group (default)
	  ◦ User Item Type
	  ◦ BOM Item Type
	  ◦ Container Type
	  ◦ Configurator Model Type
	  ◦ Contract Item Type
	  ◦ Activity Type
	  ◦ Asset Item Type

Region	Components

	• Billing Type
	• Forecast Type
	• Series Dimensions (color)
	  • (none)
	  • Status
	
	Items (Results List)
	• Views
	  • Grid/List View (icon)
	  • Carousel View (icon)
	• View Options
	  • Sort
	  • Reset to Default
	• Actions
	  • Print
	  • Export
	  • Compare
	
	Note: Select the Item link to view Item Details. You can also select the Compare checkbox for multiple items, and then select 'Compare' to view and compare item details.

Region	Components

Item Information (tabbed component container)
 	
Attributes (tab)
	• Top 10 Item Functions (tag cloud component)
	
	• Item Count by Item Status (cross tab)
	
	• Item Attributes (results table) sorted by:
	  • Primary
	    Note: Select the Item link to view Item Details in the Item Details region of this page. Select the Details link to navigate to the Item Details page. You can also select the Update Item link to navigate to the Item Master form to update the item.
	  • Inventory
	  • Bill of Materials
	  • Asset Management
	  • Costing
	  • Purchasing
	  • Receiving
	  • Physical Attributes
	  • General Planning
	  • MPS MRP Planning
	  • Lead Times
	  • Work in Progress
	  • Order Management

Region	Components
	- Invoicing - Process Manufacturing - Service - Web Store **Note:** Item Attributes can also be configured to display Descriptive Flexfield attributes. - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export to Microsoft Excel - Compare (select one or more items to compare)
Item Information (tabbed component container) Revisions (tab)	- Top 10 Item Revision Reasons (tag cloud component) - Revisions (cross tab)

Region	Components
Item Information (tabbed component container) Approved Suppliers (tab)	• Top 10 Approved Suppliers (tag cloud component) • Approved Supplier Count by Top 10 Organizations (results table) • Approved Suppliers (cross tab)
Item Information (tabbed component container) Manufacturers (tab)	• Top 10 Manufacturers (tag cloud component) • Manufacturer Count by Top 10 Organizations (results table) • Manufacturers (cross tab)
Item Information (tabbed component container) Related Items (tab)	• Top 10 Item Relationship Types (tag cloud component) • Related Item Count by Top 10 Organizations (results Table) • Related Items (cross tab)
Item Information (tabbed component container) Cross References (tab)	• Top 10 Item Cross Reference Types (tag cloud component) • Item Cross Reference Count by Top 10 Organizations (results table) • Cross References (cross tab)
Item Information (tabbed component container) Classifications (tab)	• Top 10 Inventory Categories (tag cloud component) • Item Category Assignment Count by Top 10 Organizations (results table) • Classifications and Categories (cross tab)

Region	Components
Item Information (tabbed component container) Inventory (tab)	• Inventory (results table) • Item Cost (results table)

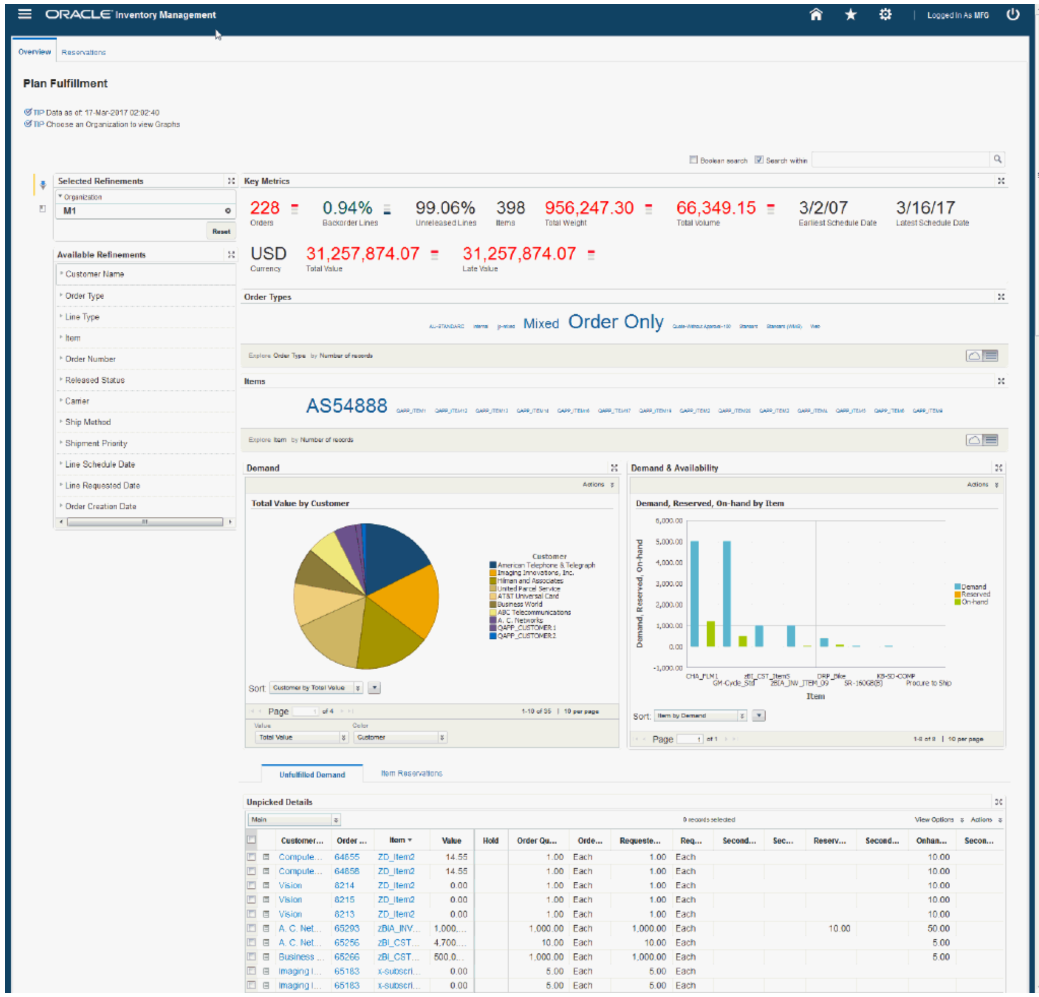
Compare	To view a side-by-side comparison of item attributes, you must select two or more items. The Compare window appears.
	• Actions
	  • Remove selected
	  • Reset view
	  • Expand all groups
	  • Collapse all groups
	  • Highlight Differences

Plan Fulfillment Page

The Plan Fulfillment page lets you plan fulfillment batches and view unfulfilled details including late, early, on time, and so on. You can also view details and order lines that do not have adequate on-hand inventory and take appropriate actions such as updating or deleting the reservation, and release a picking batch. You can view delivery logistics metrics, charts, and results tables. The following is a partial display of the Plan Fulfillment page.

From the Inventory responsibility, navigate to the Plan Fulfillment page:

(N) Order Management > Shipping > Plan Fulfillment



The following describes the Plan Fulfillment page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Available Refinements</td><td>You can use the Available Refinements component to filter data using the following attributes:
Organization
Note: Graphs and results tables will NOT display data until you select an Organization. You can select only one Organization. Charts and results tables load data when:
The user selects an Organization from Guided Navigation
The user's responsibility has access to one Organization only
Customer Name
Order Type
Line Type
Item
Order Number
Released Status
Carrier
Ship Method
Shipment Priority
Delivery
Wave Flag
Wave Name</td></tr>
</table>

Region	Components
	• Wave Status • Wave Firm Status • Line Schedule Date • Line Requested Date • Order Creation Date • Wave Creation Date

Region	Components
Key Metrics (summarization bar) **Note:** The Metrics Components are color coded to highlight warnings and health.	• **Orders** Total number of orders with at-least one line that can be fulfilled. >= 200, RED, "High Outbound Load" >= 100 & < 200, YELLOW, "Medium Outbound Load" < 100, GREEN, "Low Outbound Load" • **Backorder Lines** Percent of order lines with at least one detail in back-ordered status. "BO Lines > 50% of Total", RED, "High Backorder" "BO Lines < 10% of Total", GREEN, "Low Backorder" • **Unreleased Lines** Percent of unreleased order lines. • **Total Value** Total selling value that can be fulfilled in the appropriate currency based on unit selling price and unfulfilled. >= 20K, RED, "High Outbound Load" >= 10K & < 20K, YELLOW, "Medium Outbound Load" < 10K, GREEN, "Low Outbound Load" • **Late Value** Total selling value that can be fulfilled in the appropriate currency based on unit selling price and unfulfilled quantity on LATE order lines. >= 20K, RED, "High Late Performance" >= 10K & < 20K, YELLOW, "Medium Late

Region	Components
	Performance" < 10K, GREEN, "Low Late Performance" • **Items** Total number of unique items that will be fulfilled. • **Total Weight** Total weight (LBS) of the unfulfilled lines based on quantity and item weight. >= 80K, RED, "Heavy" > 20K & < 80K, YELLOW, "Medium" <= 20K, GREEN, "Low" • **Total Volume** Total volume (Cubic Ft.) of the unfulfilled lines based on quantity and item volume. >= 3.4K, RED, "Heavy" > 3K & < 3.4K, YELLOW, "Medium" <= 3K, GREEN, "Low" • **Earliest Schedule Date** Earliest scheduled ship date from unfulfilled order lines. • **Latest Schedule Date** Latest schedule ship date from unfulfilled order lines.
Order Types (tag cloud)	Top Ten Order Types Tag Cloud Component **Note:** The Order Types tag cloud component displays the top ten Order Types by frequency of occurrence.

Region	Components
Items (tag cloud)	Top Ten Items Tag Cloud Component **Note:** The Items tag cloud component displays the top ten items by frequency of occurrence.

Demand (chart)	Total Value by Customer (chart)
	• Sort Options
	    • Customer
	    • Customer by Total Value
	• Dimensions (Value Axis)
	    • Total Value
	    • Total Quantity
	• Series Dimension (Color)
	    • Customer
	    • Item
	    • Carrier
	    • Ship Method
	    • Shipment Priority
	    • Plan Status

Region	Components

Demand & Availability (chart)	Demand, Reserved, On-hand by Item
	• Sort Options
	  • Item
	  • Item by Demand
	  • Item by Reserved
	  • Item by On-hand

Region	Components

Unfulfilled Demand (tabbed component container)
 	
Note: This results table displays relevant attributes for sales order demand and availability.
	Unpicked Details (results table)
	• Column Sets
	  ◦ Main
	  ◦ Line
	  ◦ Detail
	  ◦ Header Descriptive Flexfield
	  ◦ Line Descriptive Flexfield
	  ◦ Detail Descriptive Flexfield
	• View Options
	  ◦ Hide / Show Columns
	  ◦ Sort
	  ◦ Reset Table to Default
	• Actions
	  ◦ Print
	  ◦ Export to Microsoft Excel
	  ◦ Compare
	• Links
	  ◦ Record Details Icon - select this icon to view record details
	  ◦ Customer Name - link to Release Sales Orders For Picking form
	  ◦ Order Number - link to Order Details Page

Region	Components
	• Item - link to Item Details Page

Region	Components
Item Reservations (tabbed component container)	Item Reservations (results table) - Column Sets - Main - Other **Note:** The default for the Reservation form can be set with the selected reservation record from the Primary Reserved Quantity column link in the Item Reservations tabbed component container. - View Options - Hide / Show Columns - Sort - Reset Table to Default Actions - Print - Export - Compare - Links - Record Details Icon - select this icon to view record details - Item - link to the Item Details page. - Primary Reserved Quantity - link to the Item Reservation window to view and update item reservation information.

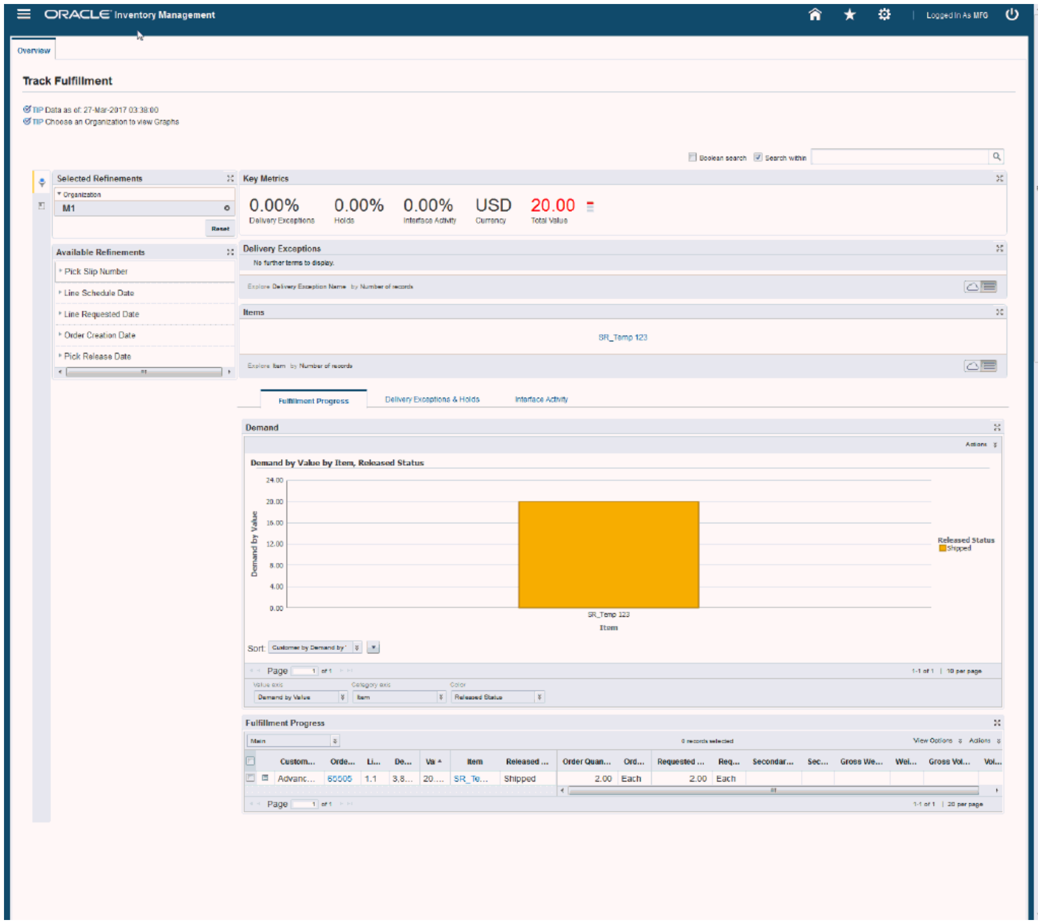
Region	Components
	• Order Number - link to the Order Details page.

Track Fulfillment Page

The Track Fulfillment page lets you track the fulfillment process and react in real time to changes impacting the delivery activities. You can monitor for delivery exceptions, holds and interface activity, and take appropriate actions to expedite the fulfillment. You can view delivery logistics metrics, charts, and results tables. The following is a partial display of the Track Fulfillment page.

From the Inventory responsibility, navigate to the Plan Fulfillment page:

(N) Order Management > Shipping > Track Fulfillment



The following describes the Track Fulfillment page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using the following attributes: • Organization Graphs and results tables will NOT display data until you select an Organization. You can select only one Organization. Charts and results tables load data when: • The user selects an Organization from Guided Navigation • The user's responsibility has access to one Organization only • Customer Name • Customer Class • Order Type • Item • Order Number • Hold • Released Status • Carrier • Ship Method • Delivery • Delivery Status • Delivery Carrier • Delivery Ship Method

Region	Components
	• Trip Name • Trip Status • Trip Carrier • Trip Ship Method • Task Status • Task Exception • Pick LPN • Drop LPN • Wave Flag • Wave Name • Wave Status • Source Subinventory • Source Locator • Pick Slip Number • Line Schedule Date • Line Requested Date • Order Creation Date • Wave Creation Date • Pick Release Date

Region	Components
Key Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health.	• **Total Value** Total Value of lines being currently fulfilled and as a part of the current data set. >= 20K, RED, "High Outbound Load" >= 10K & < 20K, YELLOW, "Medium Outbound Load" < 10K, GREEN, "Low Outbound Load" • **Delivery Exceptions** Percent of delivery details with exceptions for the current data set. >= 50% of Total, RED, "High" >= 5% & < 50%, YELLOW, "Medium" • **Holds** Percent of lines with holds. >= 5% of Total, RED, "High" • **Interface Activity** Percent of records with interface activity. >= 5% of Total, RED, "High"
Delivery Exceptions (tag cloud)	Top Ten Delivery Exceptions Tag Cloud Component **Note:** The Delivery Exceptions tag cloud component displays the top ten Delivery Exceptions by frequency of occurrence.
Items (tag cloud)	Top Ten Items Tag Cloud Component **Note:** The Items tag cloud component displays the top ten items by frequency of occurrence.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Fulfillment Progress (tabbed component container)</td><td>
Demand (chart)
Demand by Value by Customer, Released Status

Sort Options
Customer
Customer by Demand by Value
Dimensions (Value Axis)
Demand by Value
Demand by Quantity
Group Dimensions (Category Axis)
Customer
Item
Carrier
Ship Method
Shipment Priority
Series Dimensions (Color)
(none)
Released Status
Plan Status
Exception Type

Task Exceptions (chart)
Task Count by Task Exception, Task Owner
Sort Options
</td></tr>
</table>

Region	Components
	- Task Exception - Task Exception by Task Count • Series Dimensions (Color) - (none) - Task Owner - Customer - Item - Carrier - Ship Method - Shipment Priority Task Status (chart) Time in Hours by Task Status, Task Owner • Sort Options - Task Status - Task Status by Time in Hours Dimensions (Value Axis) - Time in Hours - Time in Minutes - Time in Days • Series Dimensions (Color) - (none) - Task Owner

Region	Components
	- Customer - Item - Carrier - Ship Method - Shipment Priority Fulfillment Progress (results table) **Note:** The Fulfillment Progress results table component displays the data related to in progress lines and tasks. - Column Sets - Main - Line - Delivery - Tasks - Detail Descriptive Flexfield - Delivery Descriptive Flexfield - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td></td><td>Export to Microsoft Excel
Compare
Links
Record Details Icon - select this icon to view record details
Order Number - link to Order Details page
Item - link to Item Details page</td></tr>
</table>

Region	Components

Delivery Exceptions and Holds (tabbed component container)	Delivery Exceptions (chart)
	
	Exceptions by Value by Exception Name, Delivery Name
	
	• Sort Options
	  • Exception Name
	  • Exception Name by Exceptions by Value
	• Dimensions (Value Axis)
	  • Exceptions by Value
	  • Exceptions by Count
	• Group Dimensions (Category Axis)
	  • Exception Name
	  • Customer
	  • Item
	  • Carrier
	  • Ship Method
	  • Shipment Priority
	  • Released Status
	  • Plan Status
	• Series Dimensions (Color)
	  • (none)
	  • Delivery Name
	  • Delivery Detail

Region	Components

	Holds (chart)
	
	Holds by Value by Customer, Delivery Name
	
	• Sort Options
	  • Customer
	  • Customer by Holds by Value
	• Dimensions (Value Axis)
	  • Holds by Value
	  • Holds by Line Count
	• Group Dimensions (Category Axis)
	  • Customer
	  • Item
	  • Carrier
	  • Ship Method
	  • Shipment Priority
	  • Released Status
	  • Plan Status
	• Series Dimensions (Color)
	  • (none)
	  • Delivery Name
	  • Delivery Detail
	  • Order Number
	  • Line Number

Region	Components

	Delivery Exceptions (results table)
	
	Note: The Delivery Exceptions results table component displays the data related to in-progress lines.
	
	• Column Sets
	  • Main
	  • Miscellaneous
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	• Links
	  • Record Details Icon - select this icon to view record details
	  • Delivery Name - link to the Shipping Transactions window where you can plan and manage the trips, stops, deliveries, delivery lines, and LPNs (containers).
	  • Exception Name - link to the View Exceptions window where you can track, review, and update current and past exceptions that have been

Region	Components

	logged either manually or automatically.
	
	Holds (results table)
	
	Note: The Holds results table component displays the data related to in-progress lines.
	
	• Column Sets
	  • Main
	  • Miscellaneous
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	• Links
	  • Record Details Icon - select this icon to view record details.
	  • Delivery Name - link to the Shipping Transactions form.
	  • Order Number - link to the Order Details page.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Interface Activity (tabbed component container)</td><td>Interface Activity (chart)

Exceptions by Value by Customer, Delivery Name

Note: This chart shows interface activity by sale value in appropriate currency.

Sort Options
Customer
Customer Name by Exceptions by Value
Value Axis
Exceptions by Value
Exceptions by Count
Dimensions (Category Axis)
Customer Name
Item
Carrier
Ship Method
Plan Status
Series Dimensions (Color)
(none)
Delivery
Delivery Detail ID
Order Number
</td></tr>
</table>

Region	Components
	- Line Number Interface Activity (results table) **Note:** The Interface Activity results table component displays the data related to in-progress lines and tasks. - Column Sets - Main - Miscellaneous - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export - Compare - Links - Record Details Icon - select this icon to view record details. - Delivery Name - link to the Shipping Transactions window where you can plan and manage trips, stops, deliveries, delivery lines, and LPNs (containers). - Order Number - link to the Order

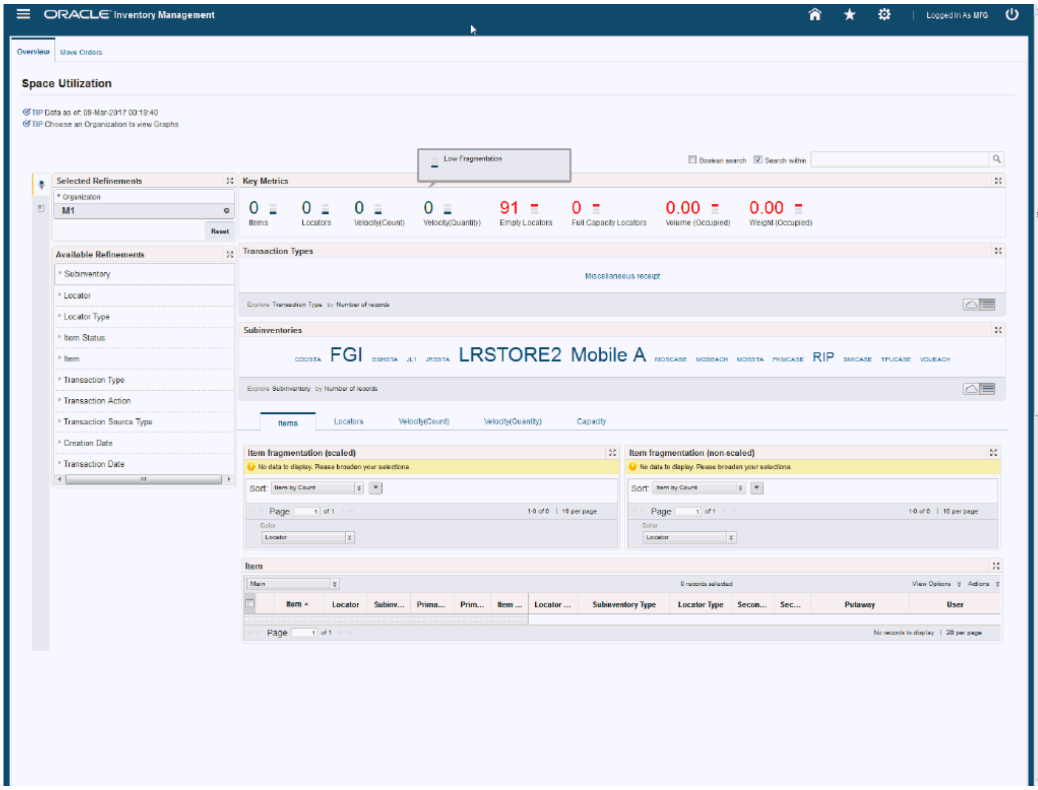
Region	Components
	Details page. • Inventory Error - link to the Transaction Interface window where you can view, edit, and correct transactions.

Space Utilization Page

The Space Utilization page lets you track fragmentation and take appropriate actions to consolidate material within Inventory. You can also find velocity mismatch with respect to transaction counts and quantities, and take appropriate actions to consolidate the material within Inventory. You can view inventory metrics, charts, and results tables. The following is a partial display of the Space Utilization page.

From the Manufacturing and Distribution Manager responsibility, navigate to the Space Utilization page:

(N) Inventory > Space Utilization



The following describes the Space Utilization page regions and components:

Region	Components
Sub Tabs (page links)	• **Overview** - Select this sub-tab to access the Space Utilization Endeca page. • **Generate Move Orders** - Use the Actions menu from the results table to navigate to the Generate Move Orders page. Once you are in the Generate Move Orders page, select the Overview sub-tab to navigate back to the Space Utilization Endeca page.

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Organization **Note:** Graphs and results tables will NOT display data until you select an Organization. You can select only one Organization. Charts and results tables load data when: • The user selects an Organization from Guided Navigation • The user's responsibility has access to one Organization only • Subinventory • Subinventory Type • Locator • Locator Type • Item Status • Item • Transaction Type • Transaction Action • Transaction Source Type • Creation Date • Transaction Date

Region	Components
Key Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health.	• **Items** Total number of fragmented items by count >= "N" >= 50, RED, "High Fragmentation" >= 10 & < 50, YELLOW, "Medium Fragmentation" < 10, GREEN, "Low Fragmentation" • **Locators** Total number of fragmented locators by count >= "N" >= 50, RED, "High Fragmentation" >= 10 & < 50, YELLOW, "Medium Fragmentation" < 10, GREEN, "Low Fragmentation" • **Velocity (Count)** Total number mismatch between item & locator velocity by transaction counts. >= 50, RED, "High Mismatch" >= 10 & < 50, YELLOW, "Medium Mismatch" < 10, GREEN, "Low Mismatch" • **Velocity (Quantity)** Total number mismatch between item & locator velocity by quantity counts. >= 50, RED, "High Mismatch" >= 10 & < 50, YELLOW, "Medium Mismatch" < 10, GREEN, "Low Mismatch" • **Empty Locators**

Region	Components
	• **Full Capacity Locators** • **Volume (Occupied)** • **Weight (Occupied)**
Transaction Types (tag cloud)	Top Ten Transaction Types Tag Cloud Component **Note:** The Transaction Types tag cloud component displays the top ten Transaction Types by frequency of occurrence.
Subinventories (tag cloud)	Top Ten Subinventories Tag Cloud Component **Note:** The Subinventories tag cloud component displays the top ten Subinventories by frequency of occurrence.

Region	Components

Items (tabbed component container)	Item fragmentation (scaled)
	
	Count by Item, Locator (chart)
	
	Note: This chart displays item fragmentation without highlighting the quantity of each item in a locator. For example, each bar represents the item and each stack represents the locators in which this item exists.
	
	• Sort Options
	  • Item
	  • Item By Count
	• Series Dimensions (Color)
	  • (none)
	  • Locator
	  • Item Status
	  • Material Status
	
	Item fragmentation (non scaled)
	
	Count, Quantity by Item, Locator (chart)
	
	Note: This chart displays item fragmentation and highlights the quantity of each item in a locator. For example, each bar represents the item and each stack represents the quantity of this item in that locator.
	
	• Sort Options
	  • Item
	  • Item by Count

Region	Components
	- Item by Quantity - Series Dimensions (Color) (none) - Locator - Item Status - Material Status Items (results table) **Note:** The Items results table component displays the data related to item fragmentation. - Column Sets - Main - Locator Descriptive Flexfield - Item Descriptive Flexfield - Subinventory Descriptive Flexfield - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export

Region	Components
	- Compare - Generate Move Order - You can create move orders and assign destination sub/locator and user. • Links - Record Details Icon - select this icon to view record details. - Item - link to the Item Details page. - Item Status - link to the Organization Item window where you can update Organization level item attributes for your current organization. - Locator Status - link to the Stock Locators window where you can view and define locators to identify physical areas where you store inventory items.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Locators (tabbed component container)</td><td>Locator fragmentation (scaled)

Count by Locator, Item (chart)

Note: This chart displays locator fragmentation without highlighting the quantity of each item in a locator, For Example, each bar represents a locator and each stack represents the items in the locator.

• Sort Options
  • Locator
  • Locator by Count
• Series Dimensions (Color)
  • (none)
  • Item
  • Item Status
  • Material Status

Locator fragmentation (non-scaled)

Count, Quantity by Locator, Item (chart)

Note: This chart displays locator fragmentation and highlights the quantity of each item in a locator. For example, each bar represents the locator and each stack represents the quantity of an item in that locator.

• Sort Options
  • Locator
  • Locator by Count</td></tr>
</table>

Region	Components
	- Locator by Quantity - Series Dimensions (Color) (none) - Item - Item Status - Material Status Locators (results table) **Note:** The Locators results table component displays the data related to locator fragmentation. - Columns Sets - Main - Locator Descriptive Flexfield - Item Descriptive Flexfield - Subinventory Descriptive Flexfield - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export

Region	Components
	- Compare - Generate Move Order - You can create move orders and assign destination sub/locator and user. • Links - Record Details Icon - select this icon to view record details. - Locator Status - link to the Stock Locators window where you can view and define locators to identify physical areas where you store inventory items. - Item - link to the Item Details page. - Item Status - link to the Organization Item window where you can update Organization level item attributes for your current organization.

Region	Components

Velocity (Count) (tabbed component container)	Item Velocity (Top 1000)
	
	Count by Item, Locator (chart)
	
	Note: This chart displays item velocity by locator. The metric for the graphs is 'transaction count (sum)'/'transaction quantity (sum).
	
	• Sort Options
	  • Item
	  • Item by Count
	• Series Dimensions (Color)
	  • (none)
	  • Locator
	  • Subinventory
	  • Material Status
	
	Locator Velocity (Top 1000)
	
	Count by Locator, Row (chart)
	
	Note: This chart displays locator velocity. The metric for this graph is 'transaction count (sum)'.
	
	• Sort Options
	  • Locator
	  • Locator by Count
	• Series Dimensions (Color)
	  • (none)

Region	Components

	• Row
	• Rack
	• Subinventory
	• Material Status
	
	Mismatch
	
	Distinct Items by Locator, Item (chart)
	
	Note: This chart displays lot fragmentation and highlights the locators that hold items where item velocity does not match locator velocity.
	
	• Sort Options
	  • Locator
	  • Locator by Distinct Items
	• Group Dimensions (Category Axis)
	  • Locator
	  • Item
	• Series Dimensions (Color)
	  • (none)
	  • Item
	  • Locator
	
	Items (results table)
	
	Note: The Items results table component displays the data related to velocity fragmentation.

Region	Components

	• Column Sets
	  • Main
	  • Locator Descriptive Flexfield
	  • Subinventory Descriptive Flexfield
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	  • Generate Move Order - You can create move orders and assign destination sub/locator and user.
	• Links
	  • Record Details Icon - select this icon to view record details.
	  • Item - link to the Item Details page.
	  • Item Status - link to the Organization Item window where you can update Organization level item attributes for your current organization.
	  • Locator Material Status - link to the Stock Locators window where you can view and define locators to

Region	Components
	identify physical areas where you store inventory items.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Velocity (Quantity) (tabbed component container)</td><td>Item Velocity (Top 1000)

Quantity by Item, Locator (chart)

Note: This chart displays item velocity by locator. The metric for the graphs is 'transaction count (sum)'/'transaction quantity (sum).

• Sort Options
  • Item
  • Item by Quantity
• Series Dimensions (Color)
  • (none)
  • Locator
  • Subinventory
  • Material Status

Locator Velocity (Top 1000)

Count by Locator, Row (chart)

Note: This chart displays locator velocity. The metric for this graph is 'transaction count (sum)'.

• Sort Options
  • Locator
  • Locator by Count
• Series Dimensions (Color)
  • (none)</td></tr>
</table>

Region	Components
	- Row - Rack - Subinventory - Material Status Mismatch Quantity by Locator, Item (chart) **Note:** This chart displays lot fragmentation and highlights the locators that hold items where item velocity does not match locator velocity. - Sort Options - Locator - Locator by Quantity - Group Dimensions (Category Axis) - Locator - Item - Series Dimensions (Color) (none) - Item - Locator Items (results table) **Note:** The Items results table component displays the data related to velocity fragmentation.

Region	Components

	• Column Sets
	  • Main
	  • Locator Descriptive Flexfield
	  • Subinventory Descriptive Flexfield
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	  • Generate Move Order - You can create move orders and assign destination sub/locator and user.
	• Links
	  • Record Details Icon - select this icon to view record details.
	  • Item - link to the Item Details page.
	  • Item Status - link to the Organization Item window where you can update Organization level item attributes for your current organization.
	  • Locator Material Status - link to the Stock Locators window where you can view and define locators to

Region	Components
	identify physical areas where you store inventory items.

Region	Components

Capacity (tabbed component container)	Capacity
	
	Occupied Capacity by Units, Available Capacity by Units by Warehouse (chart)
	
	Note: This chart displays available and occupied capacity..
	
	• Sort Options
	  • Warehouse
	  • Warehouse by Occupied Capacity by Units
	  • Warehouse by Available Capacity by Units
	• Dimensions (value axis)
	  • Occupied Capacity by Units, Available Capacity by Units
	  • Occupied Capacity by Volume, Available Capacity by Volume
	  • Occupied Capacity by Weight, Available Capacity by Weight
	• Group Dimensions (category axis)
	  • Warehouse
	  • Subinventory
	  • Locator Type
	  • Locator
	
	Finite Capacity Locators (results table)
	
	Note: The Finite Capacity Locators results

Region	Components

	table displays the data related to capacity analysis for locators with finite capacity, corresponding to the selected filter.
	
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	• Links
	  • Record Details Icon - select this icon to view record details.
	  • Subinventory - link to the Material Workbench.
	  • Locator - link to the Material Workbench.
	
	Infinite Capacity Locators (results table)
	
	Note: The Infinite Capacity Locators results table displays the data related to capacity analysis for locators with infinite capacity, corresponding to the selected filter.
	
	• View Options

Region	Components
	- Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export - Compare - Links - Record Details Icon - select this icon to view record details. - Subinventory - link to the Material Workbench. - Locator - link to the Material Workbench.

Oracle Inventory Management Information Discovery Plus Product Configuration

Setting Up Oracle Inventory Management Information Discovery Plus

This section provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 for the Oracle Inventory Management application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

Setup and Configuration Steps

To set up Oracle Inventory Management Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 19-64 by assigning UMX roles and updating access grants.

2. Schedule Setup and Load Item Master data, page 19-66 by running graphs provided by Inventory.

3. Load Attribute Configuration, page 19-69.

4. Upload User-Configurable Attributes, page 19-69 for Endeca Configuration.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Inventory Management

As part of the Oracle E-Business Suite-EID integration for Oracle Inventory Management, the following UMX Roles, Permission Sets, and Grants are provided:

Role	Internal Code Name
INV Endeca Item Discoverer	UMX|INV_ENDECA_ITEM_DISCOVERER
INV Plan Fulfillment Endeca Access Role	UMX|INV_PF_ENDECA_ACCESS_ROLE
INV Track Fulfillment Endeca Access Role	UMX|INV_TF_ENDECA_ACCESS_ROLE

Role	Internal Code Name
INV Space Utilization Endeca Access Role	UMX|INV_SU_ENDECA_ACCESS_ROLE

You must add the UMX roles to enable Endeca menus for the Inventory and Item Manager responsibilities (or any other custom responsibility which is using the same menu). You must assign these UMX roles to the responsibility.

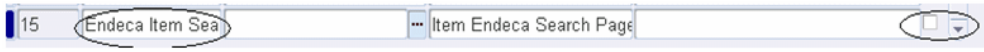
Permission Sets	Internal Code Name
Item Endeca Menu	INV_ITEM_ENDECA_MENU
INV Plan Fulfillment Endeca Access Permission Set	INV_PF_ENDECA_ACCESS_PS
INV Track Fulfillment Endeca Access Permission Set	INV_TF_ENDECA_ACCESS_PS
INV Space Utilization Endeca Access Permission Set	INV_SU_ENDECA_ACCESS_PS

Grants	Internal Code Name
INV Plan Fulfillment Endeca Access Grant	INV_PF_ENDECA_ACCESS_GRANT
INV Track Fulfillment Endeca Access Grant	INV_TF_ENDECA_ACCESS_GRANT
INV Space Utilization Endeca Access Grant	INV_SU_ENDECA_ACCESS_GRANT

To enable Endeca menus and access through a responsibility other than 'Inventory' or 'Item Manager', complete the following steps:

1. At the responsibility level menu, add a prompt-less menu entry for 'ITEM ENDECA MENU' with the GRANT checkbox unchecked.

2. Add an additional menu entry with the prompt 'Endeca Item Search' for function, and 'Item Endeca Search page' with the GRANT checkbox un-checked.



3. You must add the UMX role 'INV Endeca Item Discoverer' (Internal Code Name: UMX|INV_ENDECA_ ITEM_DISCOVERER) to enable Endeca menus for any custom responsibility which is using the same menu. You must assign this UMX role to the responsibility.

4. If you need to drill down to the OAF Item Overview page from Endeca, then one additional prompt-less entry for 'EGO User Item Workbench Menu' is required. You must select the GRANT checkbox here.

You must complete the following steps to enable Endeca Menus in Oracle E-Business Suite (EBS):

1. Assign UMX Roles to the Responsibility.

2. Oracle recommends that you make a duplicate of INV_ENDECA_ACCESS_GRANT and assign a UMX role to the responsibility through this new grant. This is a recommended practice.

> **Note:** For assigning UMX roles and grants, refer to *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Scheduling Setup for Full Endeca Refresh

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select the graph 'inv-item'.
13. Click Create to set the scheduler.

ETL Parameters for Inventory Management

You can load data to the Item Master data domain by running the following graphs provided by Inventory Management.

To load data to the ItemMaster data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under inv-item.
2. Graphs to load data include:
   - **FullLoadConfig.grf**: This graph loads all Item Master data to the data domain. You should run this graph as the first graph for Item data load after the where clause in workspace is modified to restrict Item organization(s).

     > **Note:** If you are loading data for the first time, then run FullLoadConfig.grf only. You can run other graphs according to your requirements. Run IncrementalLoadConfig.grf periodically. You can set up this graph from the Scheduling tab.

   - **LoadAdditionalOrgItems.grf**: This graph provides split load capability (split by organizations) of Full Load and Full refresh for high volume customers.
   - **IncrementalLoadConfig.grf**: This graph detects the changes (insert/update)

since the last Full Load/Incremental Load and loads incrementally changed data into the Endeca data domain.

> **Note:** Data deleted in EBS Inventory Management will not be removed from Endeca by running the Incremental Load Graph. You must run the FullLoadConfig.grf graph to remove all data from Endeca and reload everything.

- **LoadOnHandQtyFullConfig.grf**: This graph fully refreshes the on-hand and available-to-reserve for all stock-able items loaded into the inv-item Endeca data domain.

- **LoadOnhandQtyIncrConfig.grf**: This graph detects the changes (insert/update) in on-hand and available-to-reserve for all stock-able items loaded into Endeca Data domain.

  This graph cannot detect cases where the entire quantity from a sub-inventory is transacted because history is not maintained in the underlying tables. For those cases, run the LoadOnHandQtyFullConfig.grf graph.

3. Plan Fulfillment, Track Fulfillment and Space Utilization pages use three individual ETL sandboxes named invpfetl.zip, invtfetl.zip, and invsuetl.zip shared between Inventory and WMS. Each file contains Full load and Incremental graphs specific to the data domain as follows:

   - **FullLoadConfig.grf**: Full Load

   - **IncrLoadConfig.grf**: Incremental Load

   > **Note:** Read all contents of workspace.prm in sandbox inv-item while designing your dataload runs.

Restricting Data Loaded Into the Endeca Data Domain Based on Organizations and Subinventories:

The lookup 'Organization Control For WMS and INV Endeca Extensions' restricts data being loaded to the Endeca data domain based on Organization in the Plan Fulfillment, Track Fulfillment, and Space Utilization pages. The lookup is seeded with 'ALL' as the default lookup code to load data for all Inventory Organizations. If there is a requirement not to load data for all Inventory Organizations, then disable the default lookup code 'ALL and add the lookup code value 'Organization Code'.

The lookup 'Subinventory Control For WMS and INV Endeca Extensions' restricts data being loaded to the Endeca data domain based on Subinventories in the Space Utilization page. The lookup is seeded with 'ALL' as the default lookup code to load data for all Subinventories. If there is a requirement not to load data for all

Subinventories, then disable the default lookup code 'ALL' and add the lookup code value 'Organization Code' or 'Subinventory Code'.

Attribute Configuration Setup for Inventory Management Custom Configuration

Before the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1), attribute configuration must be loaded and include all seeded attributes as well as user configured custom attributes. The Endeca attribute configuration for the seeded attributes is provided in the inveidattrs.ldt file (for attribute definitions), and the inveidgrps.ldt file (for attribute group definitions). For the user configured custom attributes, you must modify the ldt files appropriately and upload using FNDLOAD.

> **Note:** This is meta-data. At present, meta-data can be loaded only during full load run (FullLoadConfig.grf). Incremental run (IncrementalLoadConfig.grf) cannot detect any new meta-data, or change to meta-data.

User-configurable attributes include:

- Catalog Groups and Descriptive Elements
- Category Sets and Categories
- Related Item - Relationship Types
- Item Cross Reference Types

Uploading User Configurable Attributes for Endeca Configuration

To add a Purchasing custom category to Endeca configuration:

1. Open the seeded Endeca attributes inveidattrs.ldt file in a text editor.
2. Following a similar structure to inveidattrs.ldt, create an additional custom ldt for user configurable attributes. For example, you can create a 'inveidatts_cust' ldt. If Purchasing is the custom attribute you are defining, then insert a section as follows:

```
BEGIN FND_EID_PDR_ATTRS "11" "Purchasing"
   ENDECA_DATATYPE = "mdex:string"
   EID_ATTR_PROFILE_ID = "1"
   EID_RELEASE_VERSION = "3.0"
   ATTRIBUTE_SOURCE = "<Company Name>"
   MANAGED_ATTRIBUTE_FLAG = "N"
   HIERARCHICAL_MGD_ATTR_FLAG = "N"
   DIM_ENABLE_REFINEMENTS_FLAG = "N"
   DIM_SEARCH_HIERARCHICAL_FLAG = "N"
   REC_SEARCH_HIERARCHICAL_FLAG = "N"
   MGD_ATTR_EID_RELEASE_VERSION = "N"
   OBSOLETED_FLAG = "N"
   OBSOLETED_EID_RELEASE_VERSION = "0"
   DISPLAY_NAME = "Purchasing"
   ATTRIBUTE_DESC = "Purchasing"
   USER_DISPLAY_NAME = "Purchasing"
   USER_ATTRIBUTE_DESC = "Purchasing"
   LAST_UPDATE_DATE = "2012/07/10"
   APPLICATION_SHORT_NAME = "INV"
   OWNER = "ORACLE12.1.3"\u0009
 END FND_EID_PDR_ATTRS
```

Note:

- 'Purchasing' in the first line is the internal name for the attribute. This can accept only the following characters: A to Z, a to z, and 0 to 9.

- DISPLAY_NAME, ATTRIBUTE_DESC, USER_DISPLAY_NAME, and USER_ATTRIBUTE_DESC values can be the same as what you use.

- EID_ATTR_PROFILE_ID = "1" defines the search level during Endeca Search. Value of '1' enables Record Count, Value Search, and Text Search. If all attributes have this value, then Endeca search performance may be slow. Evaluate and assign proper values. For more information, refer to E-Business Suite and Endeca Information Discovery documentation.

- LAST UPDATE DATE should be in format YYYY/MM/DD.

3. The seeded Endeca attributes inveidattrs.ldt file should now appear as:

4. Save and Close.

5. Open the seeded Endeca attributes group inveidgrps.ldt file in a text Editor.

6. Create a file similar to the following structure and name it "inveidgrps_custom". If Purchasing is the custom attribute you are defining, then insert a section as follows:

```
BEGIN FND_EID_ATTR_GROUPS "11" "Categories" "Purchasing"
  GROUP_ATTRIBUTE_SOURCE = "ORACLE"
  EID_RELEASE_VERSION = "3.0"
  OBSOLETED_FLAG = "N"
  OBSOLETED_EID_RELEASE_VERSION = "0"
  LAST_UPDATE_DATE = "2012/07/10"
  APPLICATION_SHORT_NAME = "INV"
  OWNER = "<Company Name>"
 END FND_EID_ATTR_GROUPS
```

   The seeded Attribute Groups that you must use include:

   - Catalog Groups and Descriptive Elements (Attribute Group: CatalogGroup)
   - Category Sets and Categories (Attribute Group: Categories)
   - Related Item – Relationship Types (Attribute Group: ItemRelationships)
   - Item Cross Reference Types (Attribute Group: ItemCrossReferences)

7. The seeded Endeca attributes inveidgrps.ldt file should now appear as:

8. Save and Close.

9. Use FNDLOAD to upload the modified ldt files.

Menus for Oracle Inventory Management

Oracle Inventory Management integration includes the following user menu functions:

User Function Name	Function Name
Item Endeca Menu	INV_ITEM_ENDECA_MENU
Item Search Home Page	INV_ENDECA_ITEM_SEARCH_HOMEPG
Plan Fulfillment	INV_PLAN_FULFILLMENT
Track Fulfillment	INV_TRACK_FULFILLMENT

User Function Name	Function Name
Space Utilization	INV_SPACE_UTILIZATION
Manufacturing and Distribution Manager - Endeca Plan Fulfillment Menu	INV_ENDECA_HOME_PF
Manufacturing and Distribution Manager - Endeca Track Fulfillment Menu	INV_ENDECA_HOME_TF
Manufacturing and Distribution Manager - Endeca Space Utilization Menu	INV_ENDECA_HOME_SU
Inventory	INV_NAVIGATE

Views and Joins for Oracle Inventory Management

The following views are used by the ETL layer in Endeca to load Oracle Item Master data to the Endeca data domain:

View Name	Purpose
MTL_ITEM_ENDECA_GRAIN_V	Denormalized view of mtl_system_items_b_kfv and its (other than below mentioned entities) child entity details
MTL_ITEM_ENDECA_GRAIN_INCR_V	Denormalized view of mtl_system_items_b_kfv and its (other than below mentioned entities) child entity details. (Incremental)
MTL_ITEM_ENDECA_CROSS_REF_V	View built on mtl_cross_references_vl, mtl_system_items_b_kfv
MTL_ITEM_ENDECA_CATEGORIES_V	View built on mtl_category_sets, mtl_item_categories , mtl_system_items_b_kfv
MTL_ITEM_ENDECA_REL_ITEMS_V	View built on mtl_related_items_view and mtl_system_items_b_kfv

View Name	Purpose
MTL_ITEM_ENDECA_REL_ITEMS_IV1	View built on mtl_related_items(Incremental)
MTL_ITEM_ENDECA_REL_ITEMS_IV2	View built on mtl_related_items(Incremental)
MTL_ITEM_ENDECA_DESC_ELEM_V	View built on mtl_descr_element_values_v, mtl_system_items_b_kfv
MTL_ITEM_ENDECA_SUPPLIERS_V	View to get Supplier Sites associated to item-org rows present in mtl_system_items_b_kfv
MTL_ITEM_ENDECA_CUSTOMERS_V	View built on MTL_CUSTOMER_ITEM_XREFS_V
MTL_ITEM_ENDECA_MANF_V	View built on MTL_MANUFACTURERS and MTL_MFG_PART_NUMBERS
MTL_ITEM_ENDECA_ONHAND_V	View built on MTL_SYSTEM_ITEMS_B, Mtl_Onhand_Quantities_Detail and Mtl_Reservations
MTL_ITEM_ENDECA_REVISIONS_V	View build on Mtl_Item_Revisions_B
INV_EID_UNPICKED_DETAILS_V	View for full load of unpicked details. Data loaded from this view into 'inv-pf' Endeca Datastore displays in the Plan Fulfillment page.
INV_EID_RESERVATIONS_V	View for full load of reservations. Data loaded from this view into 'inv-pf' Endeca Datastore displays in the Plan Fulfillment page.
INV_EID_PICKED_DETAILS_V	View for full load of picked but unfulfilled details. Data loaded from this view into 'inv-tf' Endeca Datastore displays in the Track Fulfillment page.
INV_EID_ONHAND_DETAILS_V	View for full load of on-hand item and locator fragmented data. Data loaded from this view into 'inv-su' Endeca Datastore displays in the Space Utilization page.

View Name	Purpose
INV_EID_MTL_TRANSACTIONS_V	View for full load of material transactions. Data loaded from this view into 'inv-su' Endeca Datastore displays in the Space Utilization page.
INV_EID_UNPICKED_DET_INCR_V	View for incremental load of unpicked details.
INV_EID_PICKED_DETAILS_INCR_V	View for incremental load of picked details.

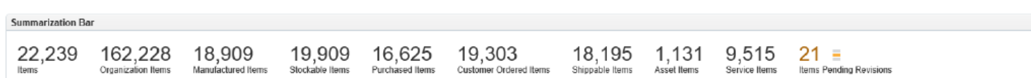
Appendix

EQL Based Portlets (Metrics and Data Visualizations)

Product Metrics Component

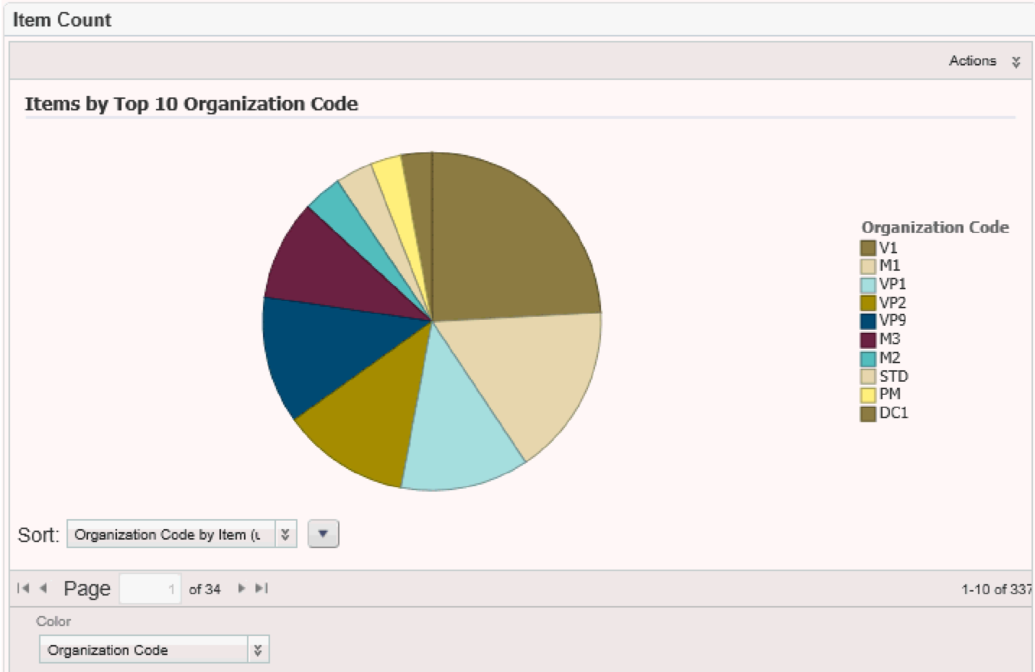
The Summarization Bar component aggregates and displays the total counts for the following item metrics:

- Items
- Organization Items
- Manufactured Items
- Stockable Items
- Purchased Items
- Customer Ordered Items
- Shippable Items
- Asset Items
- Service Items
- Items Pending Revisions



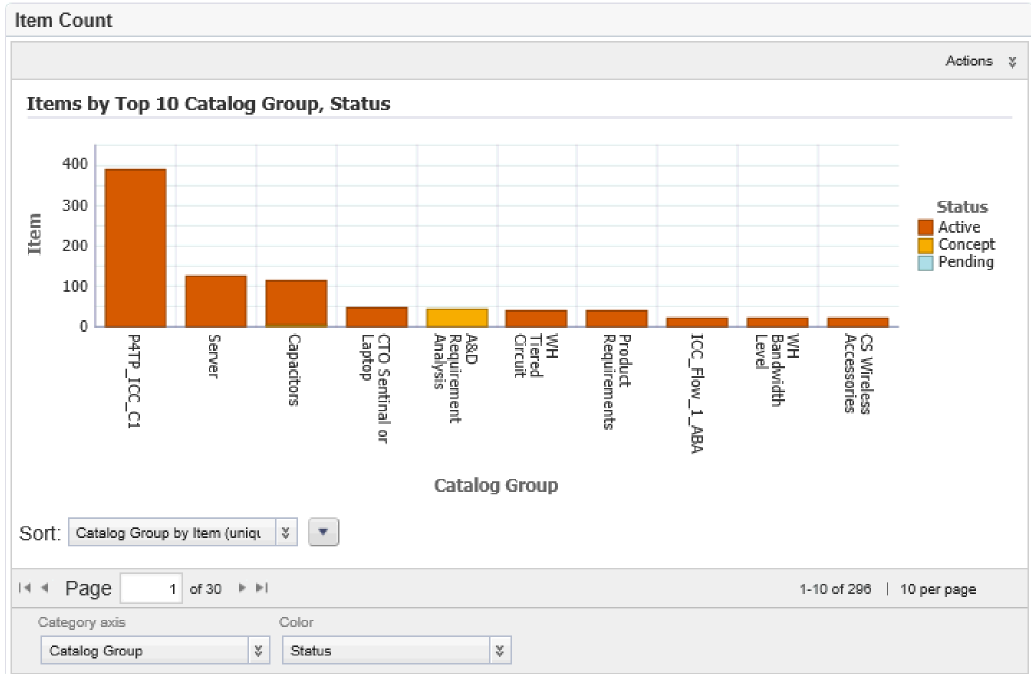
Browse Transactions Attributes - Overview - Items by Top 10 Organizations Pie Chart

The Browse Transactions Attributes - Overview - Items by Top 10 Organizations Code pie chart displays the total count of items in the top ten inventory organizations.



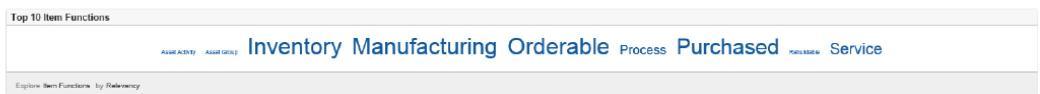
Browse Transactions Attributes - Overview - Items by Top 10 Catalog Group Bar Chart

The Browse Transactions Attributes - Overview - Items by Top 10 Catalog Group bar chart displays the count of items in the top ten catalog groups.



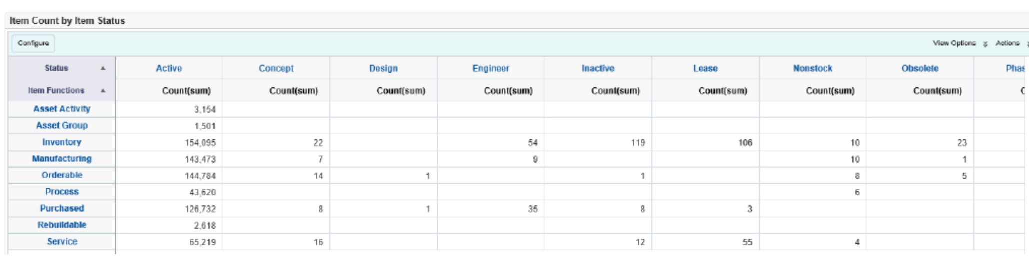
Browse Transactions Attributes - Overview - Top 10 Item Functions Tag Cloud

The Top 10 Item Functions tag cloud component displays the top ten item functions.



Browse Transactions Attributes - Attributes - Item Count by Item Status Cross Tab Chart

The Browse Transactions Attributes - Attributes - Item Count by Item Status cross tab chart component displays item count grouped by item function and item Status.


Item Count by Item Status

Status / Item Functions	Active Count(sum)	Concept Count(sum)	Design Count(sum)	Engineer Count(sum)	Inactive Count(sum)	Lease Count(sum)	Nonstock Count(sum)	Obsolete Count(sum)
Asset Activity	3,154							
Asset Group	1,501							
Inventory	154,095	22		54	119	106	10	23
Manufacturing	143,473	7		9			10	1
Orderable	144,784	14	1		1		8	5
Process	43,620						6	
Purchased	126,732	8	1	35	8	3		
Rebuildable	2,618							
Service	65,219	16			12	55	4	

Browse Transactions Attributes - Revisions - Top 10 Item Revisions Tag Cloud

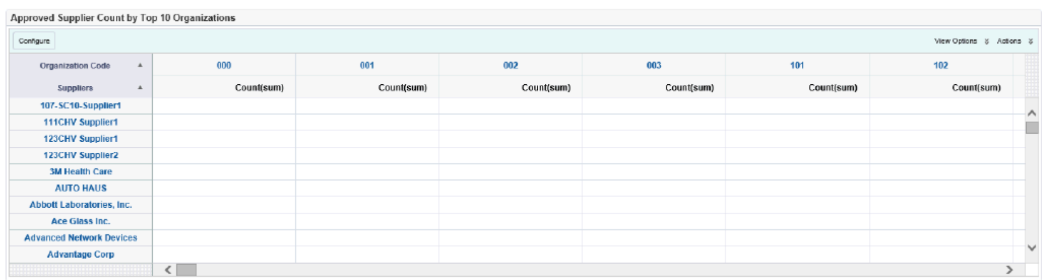
The Top 10 Item Revision Reason tag cloud component displays the top ten item revision reasons.

Browse Transactions Attributes - Approved Suppliers - Top 10 Approved Suppliers Tag Cloud

The Top 10 Approved Suppliers tag cloud component displays the top ten approved suppliers having the highest number of items.

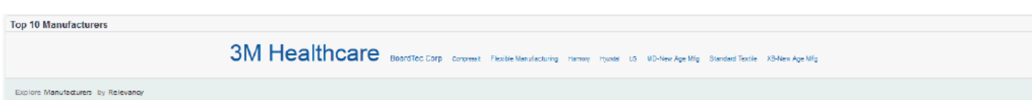
Browse Transactions Attributes - Approved Suppliers - Approved Supplier Count by Top 10 Organizations Cross Tab Chart

The Approved Supplier Count by Top 10 Organizations cross tab chart displays the count of approved suppliers in the top ten organizations having the highest number of items.



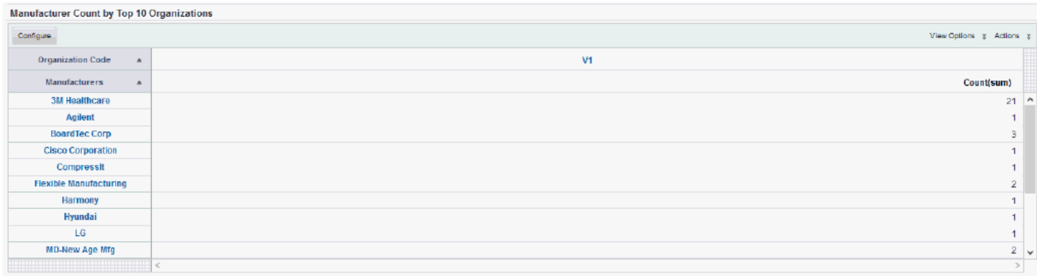
Browse Transactions Attributes - Approved Manufacturers - Top 10 Approved Manufacturers Tag Cloud

The Top 10 Manufacturers tag cloud displays the top ten approved manufacturers with the highest number of items.



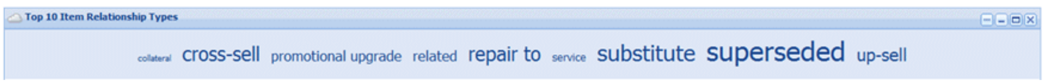
Browse Transactions Attributes - Approved Suppliers - Approved Manufacturers Count by Top 10 Organizations Cross Tab Chart

The Manufacturers Count by Top 10 Organizations cross tab chart displays the count of approved manufacturers in the top ten organizations having the highest number of items.



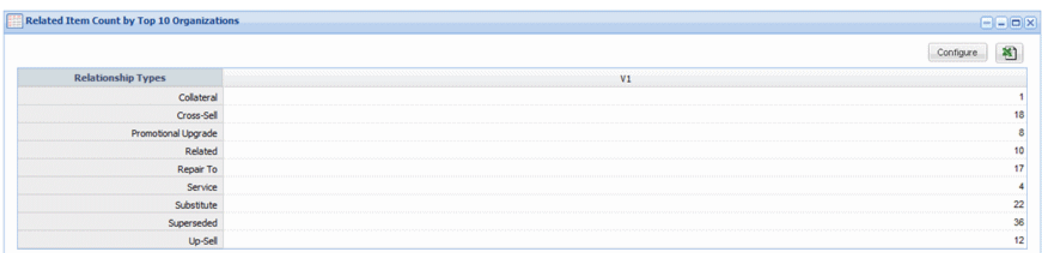
Browse Transactions Attributes - Related Items - Top 10 Item Relationship Types Tag Cloud

The Top 10 Item Relationship Types tag cloud component displays the top ten item relationship types.



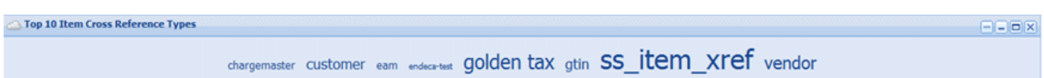
Browse Transactions Attributes - Revisions - Related Item Count by Top 10 Organizations

The Related Item Count by Top 10 Organizations cross tab chart displays the count of related items in the top ten organizations having the highest number of items.



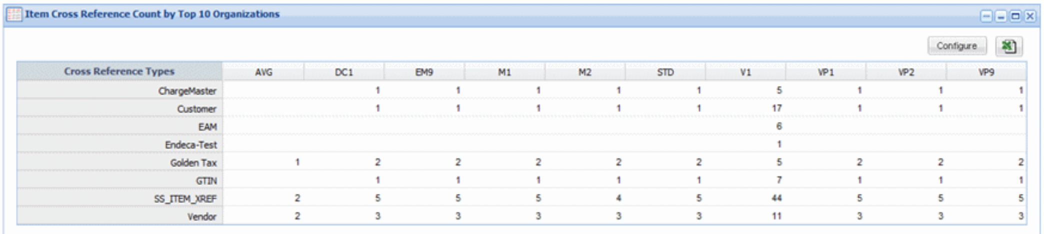
Browse Transactions Attributes - Cross References - Top 10 Cross Reference Types Tag Cloud

The Top 10 Cross Reference Types tag cloud component displays the top ten item cross reference types.



Browse Transactions Attributes - Cross References - Item Cross Reference Count by Top 10 organizations

The Item Cross Reference Count by Top 10 Organizations cross tab chart displays the count of item cross references in the top ten organizations having the highest number of items.

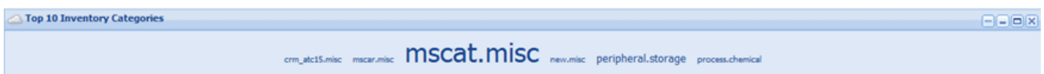


Item Cross Reference Count by Top 10 Organizations

Cross Reference Types	AVG	DC1	EM9	M1	M2	STD	V1	VP1	VP2	VP9
ChargeMaster		1	1	1	1	1	5	1	1	1
Customer		1	1	1	1	1	17	1	1	1
EAM							6			
Endeca-Test							1			
Golden Tax	1	2	2	2	2	2	5	2	2	2
GTIN		1	1	1	1	1	7	1	1	1
SS_ITEM_XREF	2	5	5	5	4	5	44	5	5	5
Vendor	2	3	3	3	3	3	11	3	3	3

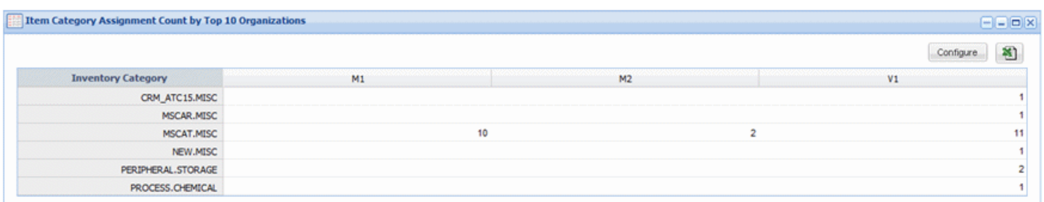
Browse Transactions Attributes - Classifications - Top 10 Inventory Categories Tag Cloud

The Item Top 10 Inventory Categories tag cloud displays the top ten inventory categories.



Browse Transactions Attributes - Classifications - Item Category Assignment by Top 10 organizations

The Item Category Assignment by Top 10 Organizations cross tab chart displays the count of item category assignments in the top ten organizations having the highest number of items.



Item Category Assignment Count by Top 10 Organizations

Inventory Category	M1	M2	V1
CRM_ATC15.MISC			1
MSCAR.MISC			1
MSCAT.MISC	10	2	11
NEW.MISC			1
PERIPHERAL.STORAGE			2
PROCESS.CHEMICAL			1

20

Oracle iProcurement Information Discovery Plus

This chapter covers the following topics:

- Overview
- Oracle iProcurement Information Discovery Plus User Interface
- Oracle iProcurement Information Discovery Plus Product Configuration
- Setting Up Oracle iProcurement Information Discovery Plus Product Configuration
- Populating Endeca Metadata for Oracle iProcurement Information Discovery Plus
- Running the Full Load Configuration Graph
- Setting Up the Scheduler to Load Incremental Graphs

Overview

Oracle iProcurement Information Discovery Plus integration lets you search and filter information. You can search all catalogs in a particular store, and view recent requisitions and notifications.

Oracle iProcurement Information Discovery Plus helps requesters to view or perform their regular activities from the home page itself without excessive navigation.

The Feedback tab enables requesters to provide feedback or suggestions to buyers. The feedback or suggestions can be about an item or a supplier or anything which the requester wants to communicate with the buyer. The buyer can access the feedback or suggestions given by requester and provide comments. It helps buyers refine the catalogs based on the requester's suggestions. Buyers also take necessary steps to address the requester's feedback or suggestions. Requesters can track the status on each suggestions. This improves the communication between requesters and buyers. Requesters can communicate the plan for the item or service to buyer well in advance to start sourcing negotiations. Feedback can be accessed by the buyer through the Procurement Command Center.

You can search using Oracle iProcurement Information Discovery Plus pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from container pages in EBS. In Oracle iProcurement Information Discovery Plus, the Shopping Stores Home page enables search functions using Endeca Information Discovery integration. This region in the Home page lets you search for all catalogs in a particular store or browse through the hierarchy of categories within the catalog to locate items and services.

Oracle iProcurement Information Discovery User Plus Interface and Integration

Oracle iProcurement Information Discovery Plus User Interface

The Shop Home page enables you to search for all catalogs in a particular store or browse through the hierarchy of categories within the catalog to locate items and services. The page displays information and data graphically and in tabular format.

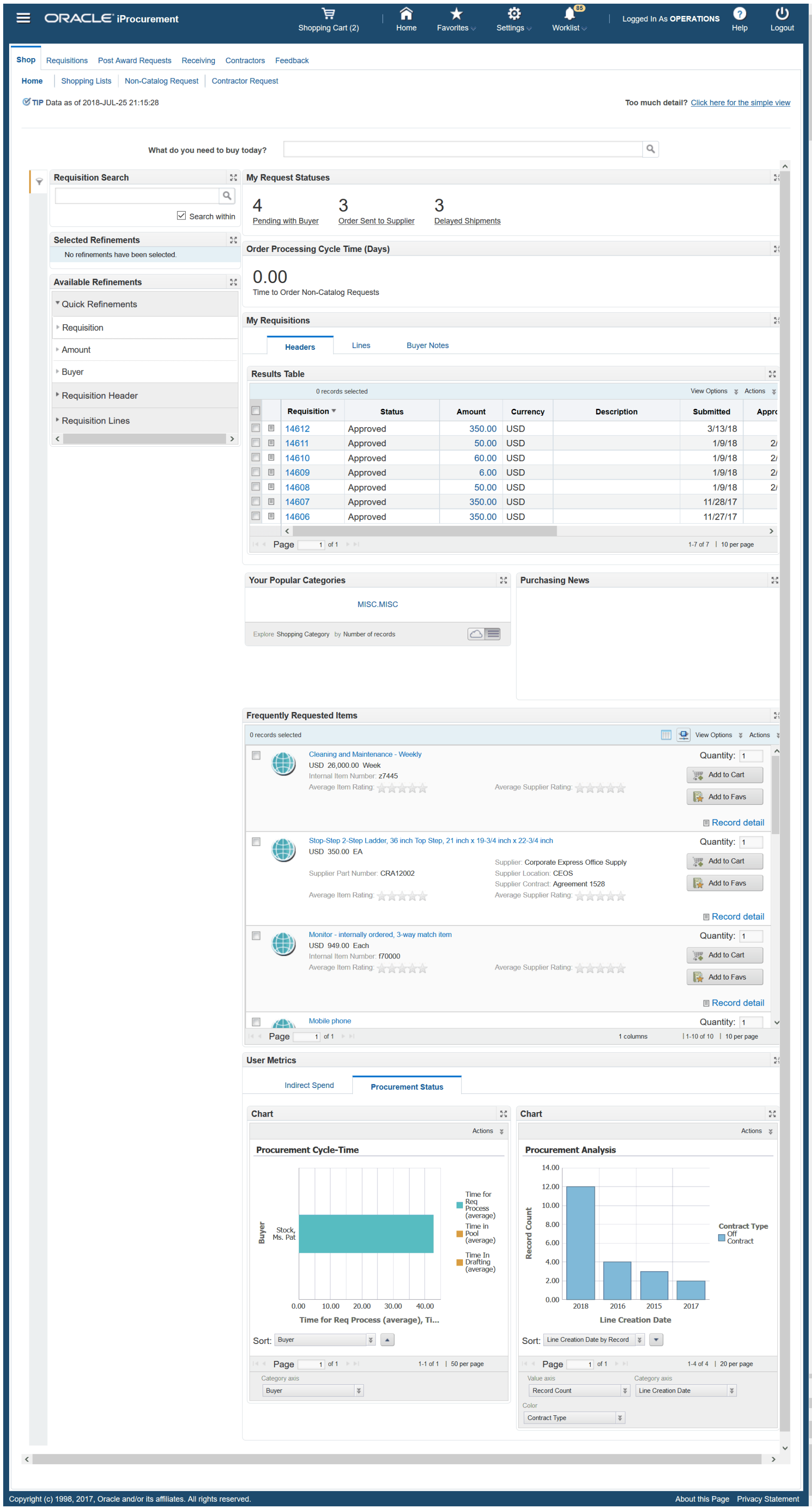
The Shop Home page contains filtering components that you can use to search, navigate and filter the data displayed in other components:

In the casual user home page, the search box, My Requisition table, Progress Metrics, Purchasing News and Frequently Requested Items are shown. For power users, a more robust home page is displayed where the key features include a clickable metric panel for user requisition status, progress metric, My Requisition table, and a tag cloud for top categories requested. In addition, metrics and charts such as Order Processing Time provide insight related to employee driven procurement.

The Shopping Lists tab enables you to view information on frequently requested items, including personal and public favorites. You can use this page to add items to favorites, add items to the cart, view the shopping cart, and compare selected items.

The Non-Catalog Request tab enables you to purchase goods and services not available in the catalog. When you create a non-catalog request, you automatically receive suggestions of matching catalog items based on the details you enter in the non-catalog request. Click the Check Catalog for Similar Items button to navigate to the Non-Catalog Request: Check Catalog for Similar Items page, which has two regions, one containing the non-catalog request details and the other displaying the suggested catalog information. This helps to reduce the volume of non catalog requests for which a catalog item selection is more appropriate, and provides preferred items or services from recommended suppliers to requesters, increasing service levels. Click the Please add this Non-Catalog Request to a catalog for future orders check box to send a message to the buyer to make the non-catalog request item to the catalog. You can use the Feedback tab to check progress of this request. Administrators can choose to show or hide the Check Catalog for Similar Items using function security, depending on your organization's requirements. By default, this button is enabled. By default, the Add to Cart button is also displayed, however, administrators can choose to disable this button and insist that users click the Check catalog for Similar Items button before adding items to the cart.

The Contract Requestor tab enables you to request to hire temporary labor, including contractors and temporary personnel.


ORACLE iProcurement
Shopping Cart (2)
Home
Favorites
Settings
Worklist
Logged In As OPERATIONS
Help
Logout
Shop
Requisitions
Post Award Requests
Receiving
Contractors
Feedback
Home
Shopping Lists
Non-Catalog Request
Contractor Request
TIP Data as of 2018-JUL-25 21:15:28
Too much detail? Click here for the simple view
What do you need to buy today?
Requisition Search
Search within
Selected Refinements
No refinements have been selected.
Available Refinements
Quick Refinements
Requisition
Amount
Buyer
Requisition Header
Requisition Lines
My Request Statuses
4
Pending with Buyer
3
Order Sent to Supplier
3
Delayed Shipments
Order Processing Cycle Time (Days)
0.00
Time to Order Non-Catalog Requests
My Requisitions
Headers
Lines
Buyer Notes
Results Table
0 records selected
View Options
Actions
Requisition
Status
Amount
Currency
Description
Submitted
14612 Approved 350.00 USD 3/13/18
14611 Approved 50.00 USD 1/9/18
14610 Approved 60.00 USD 1/9/18
14609 Approved 6.00 USD 1/9/18
14608 Approved 50.00 USD 1/9/18
14607 Approved 350.00 USD 11/28/17
14606 Approved 350.00 USD 11/27/17
Page 1 of 1
1-7 of 7 | 10 per page
Your Popular Categories
MISC.MISC
Purchasing News
Frequently Requested Items
0 records selected
Cleaning and Maintenance - Weekly
USD 26,000.00 Week
Internal Item Number: z7445
Average Item Rating:
Average Supplier Rating:
Quantity: 1
Add to Cart
Add to Favs
Record detail
Stop-Step 2-Step Ladder, 36 inch Top Step, 21 inch x 19-3/4 inch x 22-3/4 inch
USD 350.00 EA
Supplier: Corporate Express Office Supply
Supplier Location: CEOS
Supplier Part Number: CRA12002
Supplier Contract: Agreement 1528
Monitor - internally ordered, 3-way match item
USD 949.00 Each
Internal Item Number: f70000
Mobile phone
1 columns
1-10 of 10 | 10 per page
User Metrics
Indirect Spend
Procurement Status
Chart
Procurement Cycle-Time
Buyer
Stock, Ms. Pat
Time for Req Process (average)
Time in Pool (average)
Time In Drafting (average)
0.00 10.00 20.00 30.00 40.00
Time for Req Process (average), Ti...
Sort: Buyer
1-1 of 1 | 50 per page
Category axis
Buyer
Procurement Analysis
14.00 12.00 10.00 8.00 6.00 4.00 2.00 0.00
Record Count
2018 2016 2015 2017
Line Creation Date
Contract Type
Off Contract
Sort: Line Creation Date by Record
1-4 of 4 | 20 per page
Value axis
Record Count
Category axis
Line Creation Date
Color
Contract Type
Copyright (c) 1998, 2017, Oracle and/or its affiliates. All rights reserved.
About this Page
Privacy Statement

Region	Components
Tip	Displays the date on which data was last refreshed.
What do you need to buy today?	The search box enables you to enter multi-word keyword search without hiding any text. When you click the search icon without entering a keyword, the application shows the contents of the last searched results. This homepage has a broad search-box. It is a Universal Search box which is used to search items. Universal Search shows local catalog items, smartforms, information templates and punchout items. Users do not need to know which store to visit. Universal Search allows employees to immediately search for their desired item without having to first choose the appropriate catalog. All catalog content is queried including catalogs hosted by punch-out suppliers. The search displays results from every eligible source regardless of where data is hosted, and search results are displayed with remarkable speed. It is a single comprehensive search to quickly find items while retaining content restrictions, which means that the employees can only see relevant content.
Need more details? Click here for the advanced view Too much detail? Click here for simple view	Click this link to navigate to the power user homepage, which displays comprehensive information. This option is secured by function security so you control who can use this option. This is a toggle and if you are in the power user view, then you can click on the Too much detail? Click here for simple view to navigate windows.

Region	Components

Available Refinements	You can further refine your search results based on the following:
	• Quick Refinements
	  • Requisition Number - If you want to search for particular requisition then click on requisition on available refinements, a search box is shown. You can search for a requisition with that search box.
	  • Requisition Status
	  • Requester
	  • Urgent Requisitions
	  • Requisition Amount (range filter)
	  • Buyer
	  • Supplier
	  • Supplier Site
	  • Catalog Type
	• Requisitions Header
	  • Requisition Number
	  • Requisition Status
	  • Requisition Amount (range filter)
	  • Requisition Type (internal / purchase)
	  • Preparer
	  • Approved Date

Region	Components

	• Requisitions Line
	  • Requisition Line Type (Goods / Services)
	  • Requisition Item Number
	  • Req Item Rev
	  • Requisition Line Description
	  • Requisition Category
	  • UOM
	  • Price
	  • Line Amount (Foreign Currency)
	  • Line Amount (Functional Currency)
	  • Qty Delivered
	  • Cancel Flag
	  • Requisition Need By Date (Range Filter)
	  • Requisition Line Currency
	  • Requisition Project Name
	  • Requisition Task Name
	  • Requisition Ship To Location
	  • Requisition Destination Type
	  • Requester
	  • Cancel Date
	  • Qty Received

Region	Components
	- Catalog Type - Matching Basis - Urgent Requisitions - Source document type - Suggested Buyer - Supplier - Supplier Site - Requisition Expenditure Type - RFQ Required - BPA /CPA - BPA Number - Placed on RFQ - Placed on PO - PO Document Number - PO Status - Shipment Delayed - Overdue Flag - Buyer Managed Action Items - Requisition Number - Requisition Line Number - Action Entity type

Region	Components
	• Action Types • Action Assignee • Action Status • Action Target Date (range) • Days Remaining

Region	Components
My Request Statuses	As a power user, you can view the following metrics: • Pending Approval - shows the number of requisitions which are in In Process Status. • Rejected by Approver - shows the number of requisitions which are in Rejected Status. • Returned by Buyer - shows the number of requisition lines which are returned by the buyer. • Pending with Buyer - shows the number of requisitions pending with the buyer which have at least one line that is not on the PO. • Pending PO Approval - shows the number of requisitions with at least one requisition line in the PO in draft status. • Order Sent to Supplier - shows the number of requisitions with all requisition lines placed in the approved PO. • Under Negotiation - shows the number of requisitions with at least one line in the RFQ. • Delayed Shipments - shows the number of open shipments with need-by-date in the past, system date, and quantity. Click any metric to refresh the page per the selected refinement. The My Requisitions Region – Result Lists displays the following details: • Header tab

Region	Components
	- Requisition - Status - Amount - Currency - Description - Submitted - Approved - Justification - Preparer - Type - Line tab - Requisition - Line - Description - Quantity - Price - Amount - Need-by-Date - Buyer Status - statuses available are: - Pending with Buyer - Fully Invoiced

Region	Components
	- Fully Paid - Fully Received - Partially Invoiced - Order Sent to Supplier - Order Frozen - Line on Draft Order - Order Requires Re-approval - Partially Paid - Partially Received - Under Negotiation - Negotiation Complete - Negotiation Cancelled - Negotiation Pending - Order Details - Line Type - Item Name - Item - Revision - Shopping Category - Project - Task

Region	Components
	- Expenditure Type - Buyer Notes - Type - Status - Description - Owner - Target - Scheduled/Actual

Region	Components
Progress	This metric, available in the simple view, displays details of the progress and also alerts the requester where the requester needs to initiate or follow up or do some activity on the requisitions. It shows the following details: • Pending Approval - shows the number of requisitions which are in In Process Status. • Rejected by Approver - shows the number of requisitions which are in Rejected Status. • Returned by Buyer - shows the number of requisition lines which are returned by the buyer. • Pending with Buyer - shows the number of requisitions pending with the buyer which have at least one line that is not on the PO. • Pending PO Approval - shows the number of requisitions with at least one requisition line in the PO in draft status. • Order Sent to Supplier - shows the number of requisitions with all requisition lines placed in the approved PO. • Under Negotiation - shows the number of requisitions with at least one line in the RFQ. • Delayed Shipments - shows the number of open shipments with need-by-date in the past, system date, and quantity.

Region	Components
Order Processing Cycle Time (Days)	This metric, available only to power users, displays the following details: • Time to Approve Catalog Items - this is the average time in days taken between requisition submissions to approval for catalog requests. Average time in days from requisition submission to approval for catalog requests • Time to Approve Non-Catalog Requests - this is the average time in days taken between requisition submissions and approval for requisitions which contain at least one non-catalog request. **Note:** Requisition consists of at least one Non- Catalog Request as well • Time to Order Catalog Items - this is the average time in days taken between requisition submission and order approval for catalog requests. • Time to Order Non-Catalog Requests - this is the average time in days taken between requisition submission and order approval for non-catalog requests. **Note:** POs consists of at least one requisition line without agreement reference **Note:** If the value of a metric is zero, then the application automatically hides it.

Region	Components
My Requisitions My Items (Status for Each Item)	The My Requisitions region, available in the simple search, displays all your requisitions, including the Requisition number, Description (up to 60 characters), Total (USD), Status, and Express Receive. It also enables you to copy or change your requisition. • Click on the Requisition Number to view the requisition page. • If you are using the simple view, then the status of the document shows the final approver name if the status is Approved, and shows the pending approver name if the status is In- Process. The status displays on the right side of the same row as the requisition number. • If you use the simple view, then the region also displays the total amount of requisition in functional currency on the right side of the same row as the requisition header description. The details you can view are: • Headers tab - displays the details of the header including the Requisition, Authorization Status, Description, Preparer, Amount, Functional Currency, Type Lookup Code, and Approved Date. • Lines Tab - displays the details of lines including the Requisition, Description, Line Number, Line Type, Item Name, Item Revision, Shopping Category, Document Number and Current Procurement Status. • Buyer Notes tab - Requesters are exposed to buyer activity related to requested items or services with the help of Buyer Notes. Buyer Notes enable buyers to assign and track tasks to completion. This region displays the details of the buyer notes including the Target Date, Action

Region	Components
	Type, Description, Status, Assignee, Requisition, Requisition Line Number, and Days remaining. **Note:** You must have a license for Oracle Procurement Command Center to use the Buyer Notes feature. **Note:** If you create a new requisition, the confirmation messaage displays the average time taken for a requisition to be approved in the last one month, the average time taken for a requisition containing at leaast one non catalog request to be approved in last one month, the average time taken for a requisition to order approval in the last one month, and the average time taken for a requisition to order approval where atleast one of the line is not referenced to agreement in last one month.
Purchasing News	This region, available in the simple view, can have organizations purchasing polices or any documentation related to purchasing, or any alerts which your organization wants to convey to requesters. Buying organizations can use this region to enter information in rich text format and use the flexibility to configure this region based on your business needs.

Region	Components
Frequently Requested Items	You can view the top 10 Frequently Requested Items in Carousel View or Table view. The Carousel View displays in descending order, which means that the ten items most frequently requested by you will be displayed first. The frequently requested items are shown for a specific user. The details you can view are: • Item - click the Item Description to view the item details page. • Price - displays the price with unit of measure. • View Price Break – click this link to view the price break for the item. This option is only visible when there is a price-break available to an item or service. • Internal Item Number • Supplier • Supplier Location • Supplier Contract • Average Item Rating - displays the average rating out of five based on the total number of reviews, which are also displayed. • Average Supplier Rating - displays the average rating out of five based on the total number of reviews, which are also displayed. • Content Type - If a Punchout is Mandatory or Optional, it is specified in the Content Type. It can also be for Catalog Items,Punch-out Items,Smart-forms and Information Template. The terminology for these content types is:

Region	Components
	• Local Content Zone will be Catalog Items and Services • Smartform will be Smart Form • Information Content Zone will be Information Content • Punchout Content Item (Mandatory) will be Purchase Items from Supplier Store • Punchout Content Item (Optional) will be Item details at Supplier Store • Punchout Content Item (None) will be Supplier Catalog Item • Punchout Content Zone will be Shop from Supplier Store You can use this to quickly select items and specify the quantity required, add items to cart, and add items to favorites. You can view these items in a Grid/List View or a Carousel View using the toggle. You can also print and export these results. You can also compare items by selecting two or more items and click Compare. Click the link on any of the items to select it and view the item details. You can view the Item Details tab and click on Ratings or Review to view the Reviews and Ratings tab. Click on Item Description to view the Item Details page that displays the following information and relevant icon descriptors: • Price • Quantity – you can edit this information • Add to Cart button – click this to add the item to the cart

Region	Components

	• Add to Favorites button – click this to add the item to your favorites
	• Attachments – this displays any attachments
	• Item Details table displays:
	  • Shopping Category
	  • Supplier
	  • Supplier Site
	  • Supplier Item
	  • Supplier Part Auxiliary ID
	  • Internal Item Number
	  • Item Revision
	  • Source
	  • Manufacturer
	  • Manufacturer Item
	  • Availability
	  • Lead Time
	  • UNSPSC Code
	  • Key Attributes - display the appropriate icon descriptors as defined for your organization.
	  • US NIGP
	  • UNSPSC Commodity
	  • DUNS

Region	Components

	• Item Ratings
	• Supplier Ratings - You can also see the reviews count along with Supplier Ratings
	• Reviews
	• Additional Information
	• Price Breaks – this region displays the following information:
	  • Deliver To
	  • Quantity
	  • Price
	  • Discount (%)
	  • Effective From
	  • Effective To
	• Icon descriptors:
	Organizations can provide icon indicators to indicate the preferential attribute for better user experience. Preference indicator icons appear in search results along with items. Requesters can make better shopping decisions by noticing preference indicators for suppliers and items. For example: First Source Supplier, Green Supplier, and so on. Guided Buying, utilizing preference indicator items, helps requesters procure items and services from the best possible suppliers.
	  • Preferred Supplier
	  • Eco Friendly Supplier

Region	Components
	• Green Supplier • Off-Contract Item • Over-Priced Item Click on Ratings and Reviews tab. The Ratings and Reviews tab enables requesters to get recommendations on the best products / services to buy that match requester's need. Organizations greatly value feedback and rating others provide on the products which they have already bought. This enables the user community to provide feedback about item/services to the procurement department (Buyer) to tell them that they have negotiated pricing for the goods & services. Buyers can access the review comments and ratings via the Procurement Command Center to know the review trends are positive or negative. The Ratings and Reviews tab displays the following information: • Submit a Review – click this button if you have purchased the item and would like to post a review. A pop-up window displays, where you can enter details of your review and submit it. This is the pop up where user (as a reviewer) can provide the Item review and Supplier review. If there is no supplier available for the item, then supplier rating and supplier review region will not be shown. Once a review is submitted, an FYI Notification is sent to users who have subscribed for this item. Note: You can also write a review from the My Receipts at a Glance region of the Receiving page. When you provide a review, it is mandatory to give a rating. It is also mandatory to enter either a review title or a review comment. The Review popup has two regions Item Region and Supplier Region. Both regions have ratings, review title, review

Region	Components
	comments and a Do you own this item field, which has the values Purchased at work, Not Purchased, or For Personal Use. • Submit a Query – click this button if you want to get more information about the item or the supplier. A pop-up window displays where you can enter your query and submit it. • Item Ratings – the horizontal bar chart displays cumulative ratings provided by users for the item. If you click on the individual rating, then the reviews region displays only those items with the rating you selected. • Supplier Rating – the horizontal bar chart displays cumulative ratings provides by users for the supplier. If you click on the individual rating, then the reviews region displays only those suppliers with the rating you selected. If there is no supplier for an item (inventory item without supplier), then supplier ratings will not be shown. • Average Item Rating – displays the average item rating. • Average Supplier Rating – displays the average supplier rating • Users have requested this item – displays the number of times users have requested the item. • Do you want to be notified when people submit Reviews for this Item/Supplier – select Yes or No to choose if you want to be notified when other people submit reviews for the item or the supplier. You can subscribe to individual review or query. If you have not subscribed at

Region	Components
	header level and only for individual review/query, then only when the particular review/query is answered, you will be notified. • Show - choose the reviews you want to view using the list of values available. • Review – displays the reviews for the item. Click a review to view details of the review. Users can respond to a query posted or provide additional comments. Users can raise a question or clarification. Any user who has the access to this item can respond to a query. Notification will be sent on every update of Review/Query to the subscribed users. Ratings and reviews can be accessed by buyers through the Procurement Command Center.
Your Popular Categories	This tag cloud region for seeing the top categories requested is available only to power users and shows the top 3 categories requested by requester.

Region	Components

User Metrics	Indirect Spend Tab - displays the following charts:
	• Requisition Status - this is a stacked bar chart showing the number of requisitions in each status. For example, the requestor can view how many requisitions are in a buyer's pool, how many orders are created and so on. If the requisition line is linked to an order, then the status can be Order Created. If the requisition is in the pool, then it can be:
	  • In-Pool Urgent – if the urgent flag is checked
	  • In-Pool - late – if the need-by-date is in the past
	  • In-Pool – Waiting in buyer's pool.
	• Requisition Analysis - this is a pie-chart that shows requisition amount or record count in value axis by Request type (Non-Catalog Request, Catalog Items and Contractor Request), buyer, category, requisition number and Ship-to.
	Procurement Status Tab - displays the following charts:
	• Procurement Cycle Time- this shows how the procurement cycle time is calculated at each requisition-line by subtracting the Requisition Approval date from PO Approval date, and then this time is averaged across the categories, and expressed as a stacked horizontal bar-chart – Buyer, Record Count (default), Ship-to.
	• Procurement Analysis - this chart is based on Requisitions Lines with reference to On-contract Vs Off-Contract. For example, requester can see in a particular

Region	Components
	month how many On-Contract vs Off Contract Items were requested. Similarly, with regard to category if considerable amount of spend happens on a particular category, for example, Hardware. Computers, and it shows all these spend happened on Off Contract, requester can pro-actively provide the feedback to buyer that this item is requested for X value in last 3 months and no contract is available. This enables the buying organization to negotiate with the vendor and get a best price.

Search Results Page

The search results page displays the following details:

Region	Components
Tip	Displays the date on which data was last refreshed.
Search	The Search component allows you to submit keyword searches and provides type-ahead suggestions displaying attribute values that match the typed text. This type ahead search can be configured to display only the relevant content to users. You can see search results while typing. The application suggests matching search criteria from all contents. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. For example, when a user searches for 'Tablet', all relevant matching options are displayed up front where it matches. You can select the choices directly from the suggested options.

Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list. You can configure the filters and refinements. You can add and remove filters in any sequence. The filters display the total count.
Bookmarks icon	The Bookmarks component enables you to save your multi criteria search, allowing you to save a given navigation and component state and return to it at a later time.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Available Refinements</td><td>The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names:

Shopping Category
Content Type
Content Type - The terminology for content types is:

Local Content Zone will be Catalog Items and Services
Smartform will be Smart Form
Information Content Zone will be Information Content
Punchout Content Item (Mandatory) will be Purchase Items from Supplier Store
Punchout Content Item (Optional) will be Item details at Supplier Store
Punchout Content Item (None) will be Supplier Catalog Item
Punchout Content Zone will be Shop from Supplier Store

Supplier Contract
Supplier
Supplier Location
Supplier Part Number
Manufacturer
</td></tr>
</table>

Region	Components
	• Manufacturer Part Number • Price
Results	This region displays the results of your search. You can view the results in a carousel view if you prefer that. You can select items and specify the quantity required, add items to cart, add items to favorites, and add items to compare. If a Punchout is Mandatory or Optional, it is specified in the Record Type. You can also print and export these search results. Additionally, you can select two or more items and click Compare from the Action list of values. You can also print or export these results. For more details see: EBS Results Grid, page B-1
Supplier Hosted Catalogs and Smart Forms	Use this to view details such as Content Name, Content Type, Supplier, Description, Supplier Site, Unit of Measure, Price, Currency, Supplier Part Name, Manufacturer, Manufacturer Part Number, and Keywords. You can also print these details.
Shopping Cart	You can save an unlimited number of shopping carts in progress. This enables you to save selected items and return later to add more items and check out.
Compare View	You use this popup to compare items.

Oracle iProcurement Information Discovery Plus Product Configuration

Oracle iProcurement Information Discovery Plus Product Configuration

Once you have completed installation and common configurations as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), you must complete the Oracle iProcurement Information Discovery Plus product configuration setup as detailed in this section.

Setting Up Oracle iProcurement Information Discovery Plus Product Configuration

To set up Oracle iProcurement Information Discovery Plus Product Configuration, complete the following steps:

1. Grant the ICX_ENDECA_ACCESS_ROLE ((ICX Endeca Access Role) to the predefined iProcurement responsibility (FND_RESP|ICX|SELF_SERVICE_PURCHASING_5|STANDARD).

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1) for more information on roles in Oracle E-Business Suite Information Discovery.

2. Run the Populate Endeca Metadata for iProcurement concurrent program.

   See: Populating Endeca Metadata for iProcurement, page 20-31

3. Run the Full Load Configuration Graph.

   See: Running the Full Load Configuration Graph, page 20-32

4. Schedule the set up for Incremental Endeca Refresh.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 20-33

5. Additionally, if your organization uses descriptors to provide more information about an item or services, you define icon based descriptors. Icon Descriptor will be defined as like any other descriptor. The icon indicator flag is used to differentiate an icon descriptor with normal descriptors. Few icon descriptors are predefined in the application, however, you can define your own names and the number of icon descriptors.

Organizations use descriptors to provide more information about an item or services. Apart from text based descriptors to define the more information about an item or services, you can also use icon based descriptors. This helps the requesters to easily search and identity the desired item with the help of icon descriptors. Also requesters can view the items in the order of Promotion Factor. For each of the icon descriptors, a promotion factor is entered. Based on ranking of promotion factor, items in search results are displayed. Icon descriptor and Promotion factor are dependent. You can define a Promotion Factor only when the Icon indicator is set to Yes.

You can also enter the Promotion Factor. You can enter a promotion factor for each of the icon descriptors. As an administrator, you can add the descriptors as part of available refinements. For example, a user can filter the items with Icon Descriptors such Preferred Suppliers, Green Supplier etc. Available refinements is configurable. You add the Icon descriptor and Promotion factor in the Base Descriptor tab of the Schema window using the Catalog Administrator in iProcurement Catalog Administration Responsibility. By default, the Icon Indicator is set to Yes, and the Promotion Factor is predefined as 0.1. Configuring the Icon Descriptor helps the requesters to easily search and identity the desired item with the help of icon descriptors. The application, then, displays items in search results based on the ranking of the promotion factor. When multiple icon descriptors are tied to same item, the application computes the total promotion factor (cumulative of all icon descriptor's Promotion Factors tied to an item) and shows the search results accordingly.

Populating Endeca Metadata for Oracle iProcurement Information Discovery Plus

Use the Populate Endeca Metadata for iProcurement concurrent program, available under purchasing responsibility, to synchronize the available Endeca metadata. Run this concurrent program before running the full load graph. Whenever you make setup changes such as descriptor setup changes and/or content zone setup changes, you must run the full load again. If your setup changes occur daily, it is recommended that you schedule this concurrent program to run every day (1 hour before the full load graph run). After you successfully run this concurrent program, you can schedule to run the full load graph. For example, you can schedule the concurrent program to run every night at 1:00AM and then schedule the full load graph to run daily at 2:00AM.

- **Program Name:** Populate Endeca Metadata for iProcurement
- **Executable**: ICXENDECA
- **Method:** PL/SQL
- **Stored Procedure Execution file name:** ICX_ENDECA_UTIL_PKG. populate_metadata_SRS

You run this concurrent process from the Submit Requests window.

To run the Populate Endeca Metadata for iProcurement process:

1. Select Populate Endeca Metadata for iProcurement in the Name field.
2. Ensure the Save all Output Files check box is selected.
3. Click Submit.

Running the Full Load Configuration Graph

As a catalog administrator, if you need to make any changes to the descriptor setup or content zone setup, the changes will not be synchronized to the endeca server by running the incremental graph. For these changes to get reflected in the endeca server, you need to run the FullLoadConfig graph. Before you run the full load complete the following steps:

1. Run the Populate Endeca Metadata for iProcurement concurrent program. This ensures that the FND metadata table is populated with the latest setup details.
2. Run the FullLoadConfig graph from the Integrator. You can also submit the ETL using the concurrent program Run Clover ETL Graphs and schedule it for regular intervals. Once you complete the above two steps, the data in endeca server will be up-to-date.

   Note: If you have not made any changes to the configuration like descriptor setup or content zone setup, then you do not need to run the FullLoad Config graph, and running incremental load suffices.

To run the Full Load Configuration Graph:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, iProcurement Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Execute graph from the Task Type list.

12. Select icx-iproc from the Sandbox list.

13. Select graph/FullLoadConfig.grf from the Graph list.

14. Click Create to set the scheduler.

Setting Up the Scheduler to Load Incremental Graphs

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), initial data load for Oracle iProcurement Information Discovery Plus is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the Endeca MDEX server. You set up the Scheduler to load incremental graphs depending on when you update catalog information. For example, if you update catalog information frequently, you might choose to set the scheduler to load the incremental graph once in every 3 hours, or, if you do not update catalog information too frequently, you can set the scheduler to run once in a day. To keep the data in the Endeca server up-to-date, do one of the following:

- Run the IncrementalLoadConfig.grf from the icx-iproc sandbox whenever catalog information in EBS is updated.

- Alternatively, set up the scheduler in the Integrator server to run at periodic intervals.

To Schedule ETL on Integrator Server:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the scheduler, for example, iProcurement Incremental Load Scheduler.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select icx-iproc from the Sandbox list.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

21

Oracle iRecruitment Information Discovery Plus

This chapter covers the following topics:

- Overview
- Oracle iRecruitment Information Discovery Plus Job Search User Interface
- Oracle iRecruitment Information Discovery Plus Product Configuration
- Set up Oracle iRecruitment Information Discovery Plus Integration
- Setting Up the Scheduler to Load Incremental Graphs
- Roles in Oracle iRecruitment Information Discovery Plus
- Grants in Oracle iRecruitment Information Discovery Plus
- Permission Sets in Oracle iRecruitment Information Discovery Plus
- Profile Options to Enable Oracle iRecruitment Information Discovery Plus
- Views and Joins to Load Oracle iRecruitment Information Discovery Plus
- Menus and Functions in Oracle iRecruitment Information Discovery Plus

Overview

Oracle iRecruitment Information Discovery Plus Vacancy Search integration enables site vistors and registered user to search and filter information about available jobs.

Site visitors and registered users can search for jobs using the Oracle iRecruitment Home and Available Jobs pages and Endeca Information Discovery Plus (EID) design tools. These pages are hosted in an EID environment, and called from container pages in E-Business Suite. In Oracle iRecruitment Information Discovery Plus, the iRecruitment Home and Available Jobs pages enables search functions using Endeca Information Discovery integration.

Oracle iRecruitment Information Discovery User Plus Interface and Integration

Oracle iRecruitment Information Discovery Plus Job Search User Interface

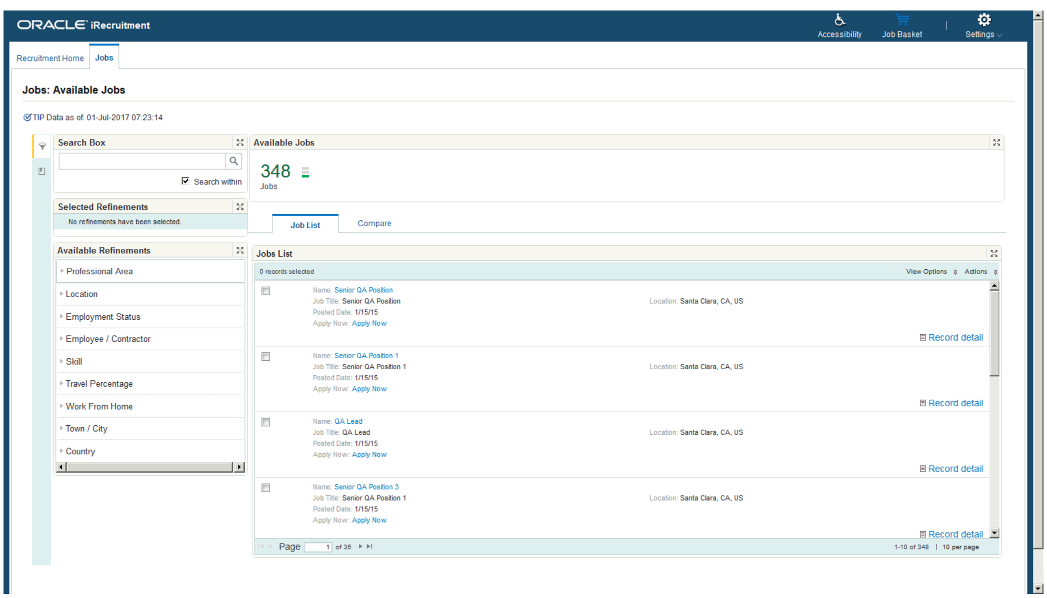
Site visitors and registered users can use the Available Jobs page and the Home page to filter and search for all jobs available in Oracle iRecruitment Information Discovery Plus. The pages displays information and data graphically and in tabular format.

Home Page

The Home page enables site visitors and registered users to search for jobs using:

- Links available in the Welcome to our Job Site region
- Advanced Search
- Keywords Search

When you use any of the search options, the application displays the Oracle Endeca region in the Jobs page.



Available Job Page

Site visitors and registered users can use the Available Jobs page to filter and search for jobs based on various attributes. This page contains two tabs - Job List and Compare.

Both these tabs contain filtering components that you can use to search, navigate and filter the data displayed in other components.

The Job List and Compare tabs contain the following regions and components:

Region	Component
Tip	Displays the date on which the data was last refreshed.
Search • Boolean Search • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Region	Component
Job List tab	You can sort the data based on various criteria such as Posted Date, Name, and Location. You can choose to print or export the data on this tab.

Region	Component
Compare tab	Select two or more records to compare jobs. Click Compare from the Actions list of values to compare the jobs. You can also print the jobs. When you select multiple records and click Compare, the results table that displays enables you to filter based on the following criteria: • Name • Job Title • Location • Professional Area • Organization Name • Posted Date • Employment Status • Employee/Contractor • Work at Home • Amount of Travel You can additionally choose to set a record as the baseline record for comparison, hide highlights, and perform the following actions: • Remove selected • Reset view • Expand all groups • Collapse all groups

Oracle iRecruitment Information Discovery Plus Product Configuration

Oracle iRecruitment Information Discovery Plus Product Configuration

Once you have completed installation and common configurations as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), you must complete the Oracle iRecruitment Information Discovery Plus product configuration setup as detailed in this section.

Set up Oracle iRecruitment Information Discovery Plus Integration

To set up Oracle iRecruitment Information Discovery Plus Product Configuration, complete the following steps:

1. Add the iRecruitment Endeca Vacancy Search Role to any predefined HCM responsibility or to any custom HCM responsibility. Update the Grant IRC_EID_VAC_SEARCH_GRANT and the Permission Set iRecruitment Endeca Vacancy Search Permissions.

   See: Grants in Oracle iRecruitment Information Discovery Plus, page 21-8

   See: Permission Sets in Oracle iRecruitment Information Discovery Plus, page 21-8

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: Appendix C: Adding Roles to Responsibilities and Setting Security Context in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1)

2. Enable the IRC: Enable Endeca Search Integration Profile Option.

   See: Profile Options to Oracle iRecruitment Information Discovery Plus Job Search, page 21-8

3. Run the Full Graph to complete the initial data load for iRecruitment.

   See: *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1)

4. Set up the Scheduler.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 21-7

Setting Up the Scheduler to Load Incremental Graphs

For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on when you update job information. To keep the data in the endeca server up-to-date, do one of the following:

- Run the IncrementalLoadConfig.grf from the irc-vacancy sandbox whenever job information in Oracle iRecruitment Information Discovery is updated
- Alternatively, set up the scheduler in the Integrator server to run at periodic intervals.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, irc-vacancy Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select irc-vacancy from the Sandbox list.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Technical Integration Components

Roles in Oracle iRecruitment Information Discovery Plus

- Role Name: iRecruitment Endeca Vacancy Search
- Code: UMX|IRC_EID_VAC_SEARCH_ROLE

Grants in Oracle iRecruitment Information Discovery Plus

- Grant Name: IRC_EID_VAC_SEARCH_GRANT
- Grantee Type: Group of Users
- Grantee: iRecruitment Endeca Vacancy Search
- Responsibility - select a predefined responsibility or a custom responsibility of your choice
- Permission Set Name- iRecruitment Endeca Vacancy Search Permissions

Permission Sets in Oracle iRecruitment Information Discovery Plus

- Permission Set Name- iRecruitment Endeca Vacancy Search Permissions
- Permission Set Code - IRC_EID_VAC_SEACH_PS
- Permissions Included in the Set: Endeca Job Search for External Site Visitors (IRC_EID_VIS_VAC_SEARCH) and Endeca Job Search for External Applicants (IRC_EID_APL_VAC_SEARCH)

Profile Options to Enable Oracle iRecruitment Information Discovery Plus

Use the profile option IRC: Enable Endeca Search Integration (IRC_ENDECA_SEARCH_ENABLED) to enable the Oracle iRecruitment Information Discovery job search. Set the value of this profile to Y (Yes) to replace the existing OA Framework job search region with the Oracle iRecruitment Information Discovery job search region.

Views and Joins to Load Oracle iRecruitment Information Discovery Plus

The following views are used by the ETL layer in Oracle Endeca to load and display Oracle iRecruitment Information Discovery Plus Job Search data to the Oracle Endeca data store:

- IRC_EID_VACANCY_SEARCH_V - View to load basic vacancy and vacancy search information.
- IRC_EID_VACANCY_SKILLS_V - View to load vacancy competency (skill) related information.
- IRC_EID_VACANCY_PUBDUR_V - Load vacancy duration related information.

Menus and Functions in Oracle iRecruitment Information Discovery Plus

The following menus and functions are available for Oracle iRecruitment Information Discovery Plus Job Search:

The following functions/permissions have been included in the iRecruitment External Candidate Menu with the Grant flag selected:

Function Name	User Function Name	Function Type	Web HTML Call
IRC_EID_VIS_VAC_SEARCH_PORTLET	Endeca Vacancy Search	JSP	GWY.jsp?targetAppType=Endeca&targetPage=web/irc-vacancy/ irc-eid-vis-vac-search
IRC_EID_APL_VAC_SEARCH_PORTLET	Endeca Vacancy Search	JSP	GWY.jsp?targetAppType=Endeca&targetPage=web/irc-vacancy/ irc-eid-apl-vac-search
IRC_EID_VIS_INTG_GATEWAY	Endeca Vacancy Search Action Gateway	SSWA JSP	OA.jsp?page=/oracle/apps/irc/endecaintg/vacsearch/webui/IrcVacSearchEidGatewayPG

Function Name	User Function Name	Function Type	Web HTML Call
IRC_EID_APL_INTG_GATEWAY	Endeca Vacancy Search Action Gateway	SSWA JSP	OA.jsp?page=/oracle/apps/irc/endecaintg/vacsearch/webui/IrcAplVacSearchEidGatewayPG

The following additional functions/permissions have included in the iRecruitment External Candidate Menu with the Grant flag cleared.

Function Name	User Function Name	Function Type	Web HTML Call
IRC_EID_VIS_VAC_SEARCH	Endeca Job Search for External Site Visitors	Sub Function	NA
IRC_EID_APL_VAC_SEARCH	Endeca Job Search for External Applicants	Sub Function	NA

22

Oracle iStore Information Discovery Plus

This chapter covers the following topics:

Overview

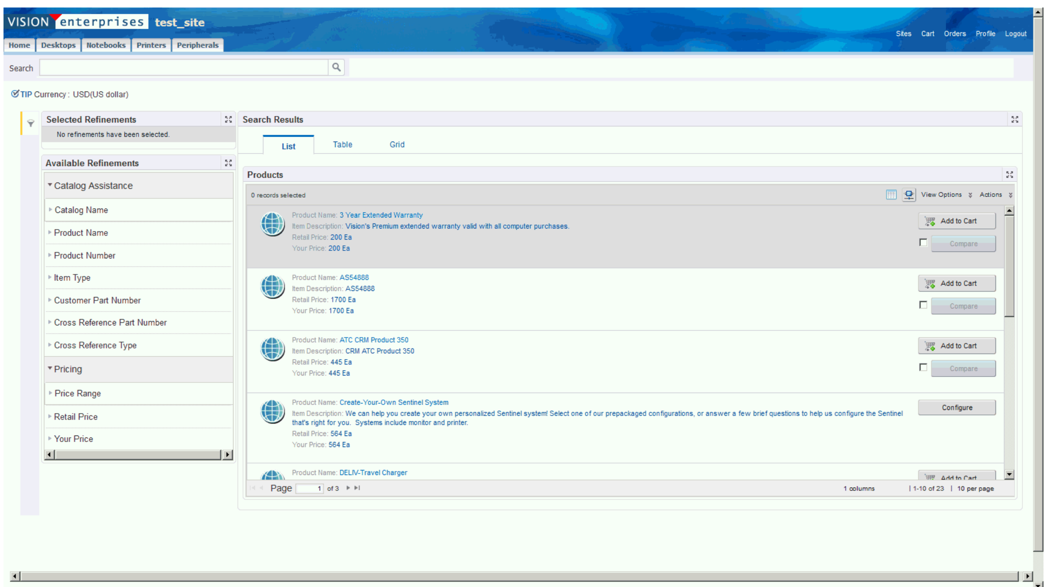
Oracle iStore Information Discovery Plus integrations enable you to search and filter product catalog in Oracle iStore. Using iStore Information Discovery, you can locate items easily with auto-suggested searches that span across storefronts, guide iStore shoppers to the correct products based on advanced filtering, and streamline the buying selection process using guided navigation.

You can search using Oracle iStore Information Discovery Plus pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from container pages in EBS. The iStore Endeca Search Home page enables search functions using Endeca Information Discovery integration. This enables you to filter and search product catalog in Oracle iStore.

Oracle iStore Information Discovery Plus User Interface and Integration

Global Search

You use the global search box region to search and filter the product catalog in iStore. The search results display in a separate page, which displays information and data graphically, in a grid format, in tabular format, as well as in a carousel view



<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Search
• Search Within</td><td>The Advanced Search component includes value search, record search, wildcard search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text.

Additional Information: See the Advanced Search Capabilities appendix in this guide for details.

Partial value search is enabled for specific attributes and type-ahead suggestions, for example *text*. Attributes for partial record search include:
• Product Name
• Product Number
• Customer Part Number
• Cross Reference Part Number
• Cross Reference Type</td></tr>
<tr><td>Tip</td><td>Tip displaying local currency.</td></tr>
<tr><td>Selected Refinements</td><td>The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.</td></tr>
</table>

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attributes: • Catalog Assistance • Pricing

Region	Components
Search Results	This sections displays the results of your search. You can view the details in a List View, Table View or Grid View in separate tabs. The List View displays the results of the search on a record-by-record basis, and groups several product attributes in the same way that the iStore Product Catalog page is organized. You can scroll though a list of products, and impose predefined sorting. You can also Export or Print the content. Click the link on the Item Description to drill to the product detail page within iStore for the product. Click the Add to Cart button to add the selected item to the active shopping cart. Select two or more check boxes adjacent to the Compare button for each row to perform a product comparison of the selected products. Additionally, the List View enables you to view the results of the search in a carousel fashion by clicking on the carousel left and right buttons, as well as selecting the image from the carousel view. You can view a list of products in a rotating carousel display and add the item in the forefront to the active shopping cart. The Table View displays the search results in a tabular format and enables you to scroll though a list of products, and impose predefined sorting. You can also use the Action list of values to Export or Print the content. Additionally, select multiple products using the check boxes and use the Action list of values to perform a comparison of the selected products. Click the Add to Cart link to add the selected item to the active shopping cart. The Grid View displays the results of the search in a matrix format. You can scroll though a list of products, and impose predefined sorting. You can also Export or Print the content. Click the link on the Product Name field, which is a drill-down hyperlink to the iStore Item Detail Page. Click the Add to

Region	Components
	Cart button to add the selected item to the active shopping cart. Select two or more check boxes adjacent to the Compare button for each row to perform a product comparison of the selected products. Additionally, the Grid View enables you to view the results of the search in a carousel fashion by clicking on the carousel left and right buttons, as well as selecting the image from the carousel view. You can view a list of products in a rotating carousel display and add the item in the forefront to the active shopping cart.

Oracle iStore Information Discovery Plus Product Configuration

Oracle iStore Information Discovery Plus Product Configuration

Once you have completed installation and common configurations as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), you must complete the Oracle iStore Information Discovery Plus product configuration setup as detailed in this section.

Setting up Oracle iStore Information Discovery Plus Integration

1. Set up the Profile Options.

   See: Setting Up Oracle iStore Information Discovery Plus Profile Options, page 22-7

2. Run iStore Endeca Data Population concurrent program. When you run the iStore Endeca Data Population concurrent program, the application populates a new pricing table, IBE_SEARCH_PART_PRICE to support pricing in Endeca, and also populates the foundation FND table, FND_EID_DDR_MGD_ATT_VALS to support displaying hierarchical sections.

   See: Populating iStore Endeca Data, page 22-8

3. Run the Full Load Graph.

   See: Running the Full Load Graph, page 22-8

4. Set up the Scheduler.

   See: Setting Up the Scheduler for Incremental Refresh, page 22-9

Setting Up Oracle iStore Information Discovery Plus Profile Options

Set up the following profile options for Oracle iStore Information Discovery Plus:

- **IBE: Enable Endeca Search** - This profile option enables System Administrators to specify the type of search to be used by iStore. If this profile option is set to Yes, then iStore will use the Endeca search capability, and the controls for Basic and Advanced search will not be displayed. The default value of this profile option is blank, and System Administrators can set the value for this profile option at the Site, Application, Responsibility, and User levels.

Populating iStore Endeca Data

Use the iStore Endeca Data Population concurrent program, available under the iStore Administrator responsibility to populate Oracle iStore's Endeca search table with product pricing and the product catalog section hierarchy information. When you run this concurrent program, the application populates pricing information into a table IBE_SEARCH_PART_PRICE and the into the table FND_EID_DDR_MGD_ATT_VALS. If you have chosen to use the iStore-Endeca extension for searching, then rerun this concurrent program before you perform the Endeca ETL full or incremental data population. By default, this concurrent program will be scheduled as part of the Endeca ETL graph data population process, however, you can always manually run this concurrent program if needed.

- **Program Name:** iStore Endeca Data Population
- **Executable:** IBE_EID_DATA_POPULATE
- **Description:** Concurrent Program to populate Endeca Data including the price and Section Hierarchy
- **Method:** PL/SQL
- **Stored Procedure Execution File Name:** IBE_endeca_pvt.populate_Endeca_data

You run this concurrent process from the Submit Requests window.

To run the iStore Endeca Data Population program:

1. Select iStore Endeca Data Population in the Name field.
2. Ensure the Save all Output Files check box is selected.
3. Click Submit.

Running the Full Load Graph

Once you have run the full load graph in accordance with the Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8 document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.

3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, iStore Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select ibe-search from the Sandbox list, based on the module for which you are running the full load.
13. Select graph/FullLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler for Incremental Refresh

Once the Full graph is run in accordance with the Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8 document (Doc ID: 2214431.1), initial data load for iStore is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. You would typically run an incremental refresh each time you upload a new product catalog. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the amount of claims or budget information requiring update.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, iStore Incremental Load Scheduler.

5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select ibe-search from the Sandbox list, based on the module for which you are running the incremental load.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Technical Integration Components

View and Joins to Load Oracle iStore Data

The following views are used by the ETL layer in Endeca to load and display Oracle iStore.data to the Oracle Endeca data store:

- **IBE_EID_SEARCH_V** - View used in the data collection process to extract data for the full or incremental graph loads.

23

Oracle Learning Management Information Discovery Plus

This chapter covers the following topics:

- Overview
- Course Catalog Page
- Oracle Learning Management Information Discovery Plus Product Configuration
- Setting Up Oracle Learning Management Information Discovery Plus Product Configuration
- Loading Oracle Learning Management Information Discovery Plus Data into the Endeca Data StoreLoading Oracle Learning Management Information Discovery Plus into the Endeca Data Store
- Running the Full Load Configuration Graph
- Setting Up the Scheduler to Load Incremental Graphs
- Roles in Oracle Learning Management Information Discovery Plus
- Grants in Oracle Learning Management Information Discovery Plus
- Views and Joins to Load Oracle Learning Management Information Discovery Plus Job Search
- Menus and Functions in Oracle Learning Management Information Discovery Plus

Overview

You can use Oracle Learning Management to add filters to browse and search for new training in the Course Catalog.

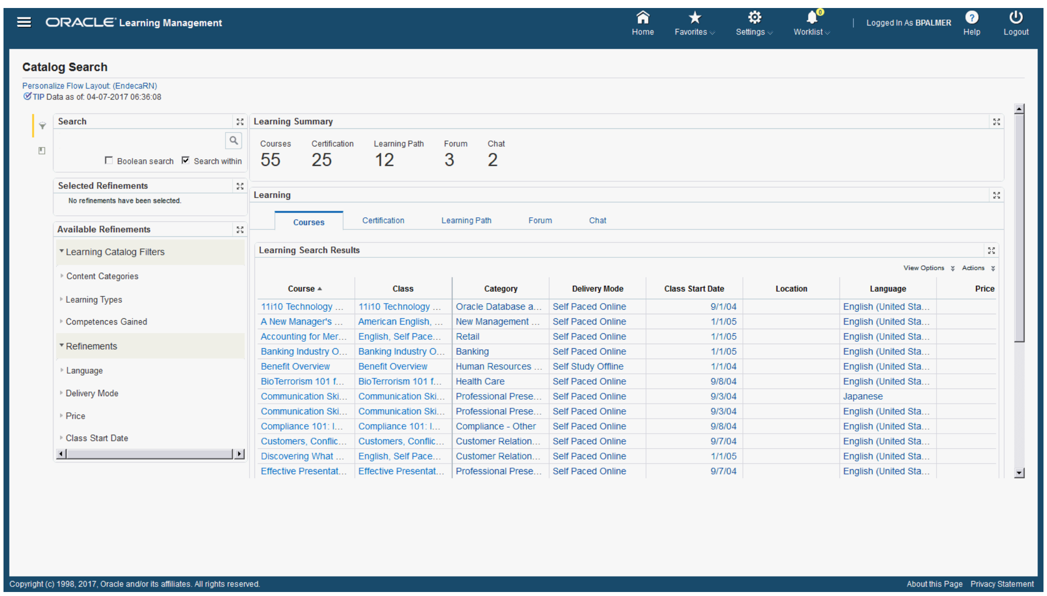
You can search using Oracle Learning Management Information Discovery Plus pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS.

Oracle Learning Management Information Discovery Plus User Interface and Integration

Course Catalog Page

The Course Catalog page enables learners to search for Learning Management data using various filtering options. The page displays information and data graphically and in tabular format. The results you can view are based on the keywords you entered in the Learner Home page.

> **Note:** Endeca Server Connection in Studio: Once the studio managed server is started and full load ETL is run successfully, you must enable the SecurityEnabled attribute to true in the Endeca server connection for ota-catalog.



Region	Components
Tip	Displays the date on which data was last refreshed.

Region	Components
Search • Boolean Search • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select values from selected attributes, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Region	Components
Learning Summary	This metrics displays the following: • Courses • Certification • Learning Path • Forum • Chat **Additional Information:** For more information on Translation, see *Summarization Bar Metric Refinement*, page B-32 in the Appendix EBS Custom Components.

Region	Components

Learning	This consists of the following tabs:
	• Courses
	  • Course
	  • Class
	  • Category
	  • Delivery Mode
	  • Class Start Date
	  • Location
	  • Language
	• Certifications
	  • Certification
	  • Category
	  • Complete In
	  • Valid For
	• Learning Paths
	  • Learning Path
	  • Category
	  • Completion Target
	• Chats
	  • Chat
	  • Category
	  • Start Date

Region	Components

	- Start Time
	- Forums
	  - Forum
	  - Category
	  - Start Date
	
	You can also print all these details.

Oracle Learning Management Information Discovery Plus Product Configuration

Oracle Learning Management Information Discovery Plus Product Configuration

Once you have completed installation and common configurations as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), you must complete the Oracle Learning Management Information Discovery Plus product configuration setup as detailed in this section.

Setting Up Oracle Learning Management Information Discovery Plus Product Configuration

To set up Oracle Learning Management Information Discovery Plus Product Configuration, complete the following steps:

1. Add the Learner Endeca Catalog Search (OTA_LRNR_ENDECA_ACCESS_ROLE) role to any predefined or custom Learning Self-Service responsibility.

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1) for more information on roles in Oracle E-Business Suite Information Discovery .

2. Run the Full Load Configuration Graph.

   See: Running the Full Load Configuration Graph, page 23-8

3. Schedule the set up for Incremental Endeca Refresh.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 23-9

Loading Oracle Learning Management Information Discovery Plus Data into the Endeca Data Store

Clover ETL within Endeca queries Oracle Learning Management Information Discovery Plus Views and does a full data load to the ota-objects data store in Endeca. After the first data load, full data load or incremental data load can be performed periodically. Incremental data load will update all the records in Endeca Learning Management Information Discovery data store which were updated in EBS after the last load. After the data has been loaded in the Oracle Learning Management Information Discovery Plus data store, it can be queried and shown in the Oracle Learning Management Information Discovery Plus pages.

Oracle Learning Management Information Discovery Plus Data Sources

The following data sources are defined in the Oracle Learning Management Information Discovery Plus data store in Endeca and are used to query data in different tabs in Oracle Learning Management Information Discovery Plus. These data sources include:

- **ota-catalog**: This is the parent data source containing all the data sources mentioned below, and used for search and filter components
- **ota-course**: This data source is used to display course results.
- **ota-certification**: This data source is used to display certification results.
- **ota-learningpath** This data source is used to display learning paths results.
- **ota-chat** - This data source is used to display chat results.
- **ota-forum** - This data source is used to display forum results.

> **Note:** Endeca Server Connection in Studio: Once the studio managed server is started and full load ETL is run successfully, you must enable the SecurityEnabled attribute to true in the Endeca server connection for ota-catalog.

Running the Full Load Configuration Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run the Full Load Configuration Graph:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Learning Management Full Load Scheduler.

5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select ota-objects from the Sandbox list.
13. Select graph/FullLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

    Note: Endeca Server Connection in Studio: Once the studio managed server is started and full load ETL is run successfully, you must enable the SecurityEnabled attribute to true in the Endeca server connection for ota-catalog.

Setting Up the Scheduler to Load Incremental Graphs

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), initial data load for Learning Management is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the volume of information requiring update.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Learning Management Incremental Load Scheduler.

5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select ota-objects from the Sandbox list.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Technical Integration Components

Roles in Oracle Learning Management Information Discovery Plus

- Role Name: Learner Endeca Catalog Search
- Code: UMX|OTA_LRNR_ENDECA_ACCESS_ROLE

Grants in Oracle Learning Management Information Discovery Plus

- Grant Name: Learner Endeca Catalog Search
- Grant Code: OTA_END_CATALOG_SEARCH_GRANT
- Grantee Type: Group of Users
- Grantee: Learner Endeca Catalog Search
- Responsibility - select a predefined responsibility or a custom responsibility of your choice
- Permission Set Code: OTA_END_CATALOG_SEARCH_PS
- Permission Set Name- OTA Endeca Catalog Search Permission Set

Views and Joins to Load Oracle Learning Management Information Discovery Plus Job Search

The following views are used by the ETL layer in Oracle Endeca to load and display Oracle Learning Management Information Discovery Plus data to the Oracle Endeca data store:

- ota_end_event_v - View to load course data information.
- ota_end_cert_v - View to load certification date.
- ota_end_lp_v - View to load learning path data.
- ota_end_chat_v - View to load chat data.
- ota_end_forum_v - View to load forum data.
- ota_end_obj_comp_v - View to load competency data.

- ota_end_obj_assoc_v - View to load learner access data.

Menus and Functions in Oracle Learning Management Information Discovery Plus

The following functions are available for the Learner Application Menu (OTA_LEARNER_APPLICATION_MENU) in Oracle Learning Management Information Discovery Plus:

Function Code	User Function Name	Function Type	Web HTML Call
OTA_EID_OBJ_SEARCH	OTA Endeca Catalog Search	JSP	GWY.jsp?targetAppType=Endeca&targetPage=web/ota/ota-eid-obj-search

24

Oracle Order Management Information Discovery Plus

This chapter covers the following topics:

- Running the Full Load Graph
- Setting Up the Scheduler for Incremental Refresh
- Customizing Data Loads

Overview

The Oracle Order Management application is an order-to-cash solution that provides capabilities for customers, partners, and employees to select the right products and services, negotiate best prices, and ensure timely and accurate order fulfillment. Delays in order fulfillment impacts organization overhead, customer satisfaction, and revenue.

Oracle Order Management Information Discovery Plus enables you to search and filter Open Orders, Closed Orders, and Returns information on a wide range of search criteria. You can view and analyze order information and order fulfillment delays using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables. Based on this data, organizations can take corrective action to streamline the order fulfillment process, meet periodic sales targets by prioritizing high value orders, and fix revenue leakage caused by RMAs.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite (EBS) Release 12.2 V8 for the Oracle Order Management application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

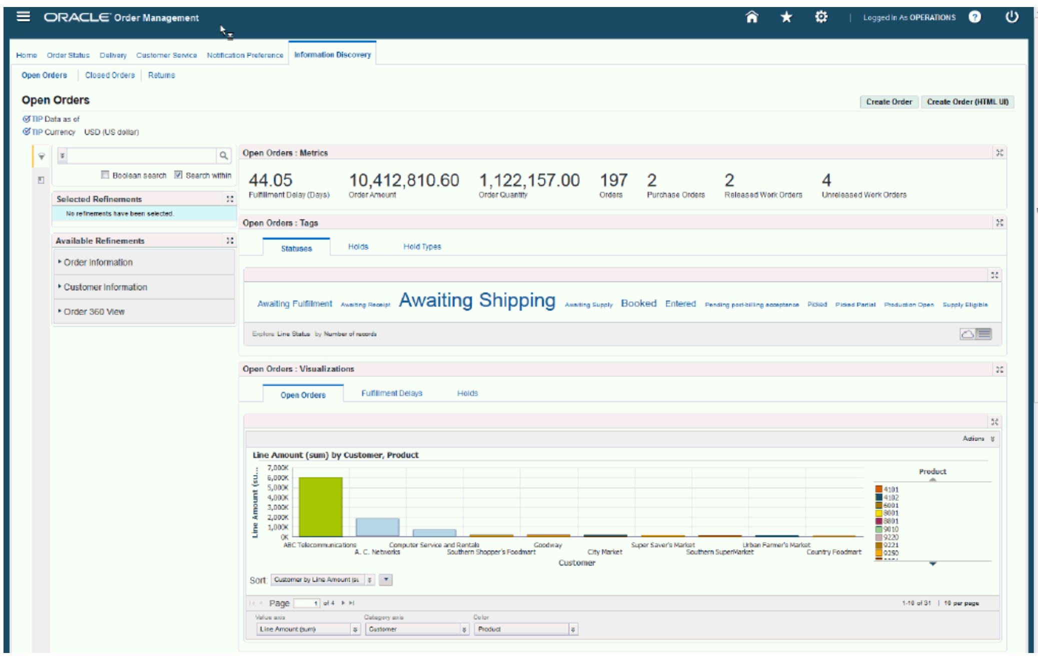
Oracle Order Management Information Discovery Plus User Interfaces

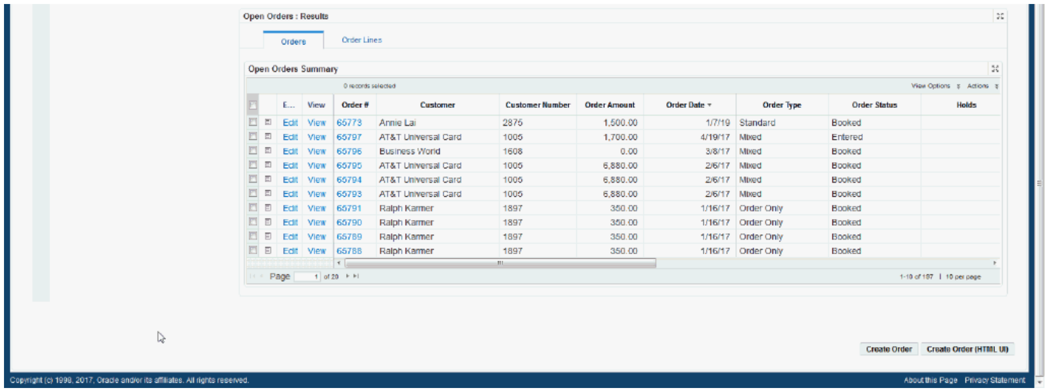
Open Orders Page

The Endeca Open Orders page displays dashboard metrics related to fulfillment delays on open sales order lines which are at various stages of the order-to-cash cycle, but not yet closed. The page displays information and data graphically and in tabular format. The following graphic displays a view of the Endeca Open Orders page.

From the Order Information Super User responsibility, navigate to the Open Orders page:

(N) Order Information > Information Discovery > Open Orders





When you open the Endeca Open Orders page under the Information Discovery tab, you can search and filter order fulfillment delay information. You can analyze the data and review open order and production metrics, charts, graphs, and tables. You can click the Create Order button in the top right-hand region of the Open Orders page to launch the Sales Order form and enter new sales order details. In addition, you can click the Create Order HTML UI button to open the HTML user interface for Order creation.

The following table describes the Endeca Open Orders page regions and components:

Region	**Components**
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Region	Components
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names:
	• Order Information
	• Customer Information
	• Order 360 View
	• Additional Line Attribute Information (Descriptive Flexfields)
	  • Context Value
	    Note: This attribute group contains all segments of the Descriptive Flexfield: 'Additional Line Attribute Information' across all distinct contexts. Users can perform data discovery based on these Descriptive Flexfield segment attributes.
	• Additional Header Information
	  • Context Value
	  Note: This attribute group contains all segments of the Descriptive Flexfield: 'Additional Header Information' across all distinct contexts. Users can perform data discovery based on these Descriptive Flexfield segment attributes. Only global DFF elements are displayed along with context value. Other context specific attributes are displayed only upon selecting a specific context.

Region	Components
	Note: The above two Descriptive Flexfield (DFF) attribute groups (Line/Header) are visible in the Available Refinements section only if DFFs are enabled in the environment.

Region	Components
Open Orders: Metrics (summarization bar)	• **Fulfillment Delay (Days)** The average of fulfillment delays for each order line (inclusive of zero values) divided by number of order lines. • **Order Amount** The sum of product of Unit Selling Price and Ordered Quantity for each order line. **Note:** The order amount for each line is the amount on the order line (referred to as transaction amount) converted into the functional currency of the operating unit or the currency specified in OM: Endeca Display Currency. • **Order Quantity** The sum of order quantity for each line. **Note:** The order quantity for each line is the quantity on the order line (referred to as transaction quantity in OM Information Discovery for Endeca) converted into the Primary UOM of the product. • **Orders** Number of orders (not order lines). • **Purchase Orders** Number of Purchase Orders • **Released Work Orders** Number of released work orders • **Unreleased Work Orders**

Region	Components
	Number of unreleased work orders
Open Orders: Tags (tabbed component container) Statuses (tab)	Statuses Tag Cloud Component **Note:** The Statuses Tag Cloud Component displays the top ten open order line status values for open orders. Status values in this component are highlighted in progressively bolder and larger font based on the frequency of occurrence.
Open Orders: Tags (tabbed component container) Holds (tab)	Holds Tag Cloud Component **Note:** The Open Order Holds Tag Cloud Component displays the top ten hold reasons corresponding to both open orders and lines. Hold reasons in this component are highlighted in progressively bolder and larger font based on the frequency of occurrence.
Open Orders: Tags (tabbed component container) Hold Types (tab)	Hold Type Cloud Component **Note:** The Hold Type Tag Cloud Component displays the top ten hold types corresponding to both open orders and lines. Hold types in this component are highlighted in progressively bolder and larger font based on the frequency of occurrence.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Open Orders: Visualizations (tabbed component container)

Open Orders (tab)</td><td>Order Amount by Customer, Product (chart)
Sort Options
Customer
Customer by Line Amount (sum)
Dimensions (value axis)
Line Amount (sum)
Order Quantity
Group Dimensions (category axis)
Customer
Product
Warehouse
Series Dimensions (color)
(none)
Product
Customer
Warehouse
Shipment Method
Line Status
Line Type</td></tr>
</table>

Region	Components

Open Orders: Visualizations (tabbed component container)
 	
Fulfillment Delays (tab)
	Order Amount by Fulfillment Delay, Customer (chart)
	
	• Sort Options
	    • Fulfillment Delay
	    • Fulfillment Delay by Line Amount (sum)
	• Dimension (value axis)
	    • Order Amount
	    • Order Quantity
	• Series Dimensions (color)
	    • (none)
	    • Customer
	    • Product
	    • Warehouse
	    • Shipment Method
	    • Line Status
	    • Line Type

Region	Components

Open Orders: Visualizations (tabbed component container)
 	
Holds (tab)
	Order Amount by Holds, Customer (chart)
	
	• Sort Options
	    • Holds
	    • Holds by Line Amount (sum)
	• Dimension (value axis)
	    • Order Amount
	    • Line Quantity (sum)
	
	Series Dimensions (color)
	    • (none)
	    • Customer
	    • Product
	    • Warehouse
	    • Line Status
	    • Line Type

Region	Components

Open Orders: Results (tabbed component container)
 	
Orders (tab)
	Open Orders Summary (results table)
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • **Print**
	  • **Export**
	  • **Launch Order Organizer** - When you select this action, all selected orders display in the 'Summary' tab of the Order Organizer search results form. This enables you to execute additional actions including Book, Price, Mass Change, and so on.
	  • **Launch Scheduling Organizer** - When you select this action, all selected orders display in the 'Summary' tab of the Scheduling Organizer search results form. This enables you to execute additional actions including Reserve, Schedule, and so on.
	  • **Update Orders** - When you select this action, the Order Management html user interface page appears where you can search, view, and perform actions on orders for the selected row.
	  • **Order 360 View** - Select this action to open the Order 360 View page. You can view key open order metrics, graphs, and results table information

Region	Components

	corresponding to the records selected. You can use the EBS Quick Links to navigate to EBS pages to enter and maintain order and item information. You can also use EBS quick links to view other EID product content, and navigate to those EBS product pages to perform allowed actions.
	
	• Links
	  • **Edit** - Select the Edit link to navigate to the Sales Orders form to enter, view, and update sales orders.
	  • **View** - Select the View link to navigate to the Sales Order Details page to view order details for the selected order.
	  • **Order Number** - Select the Order Number link to navigate to an additional Sales Order Details page to search, view, and perform actions on orders and order lines.

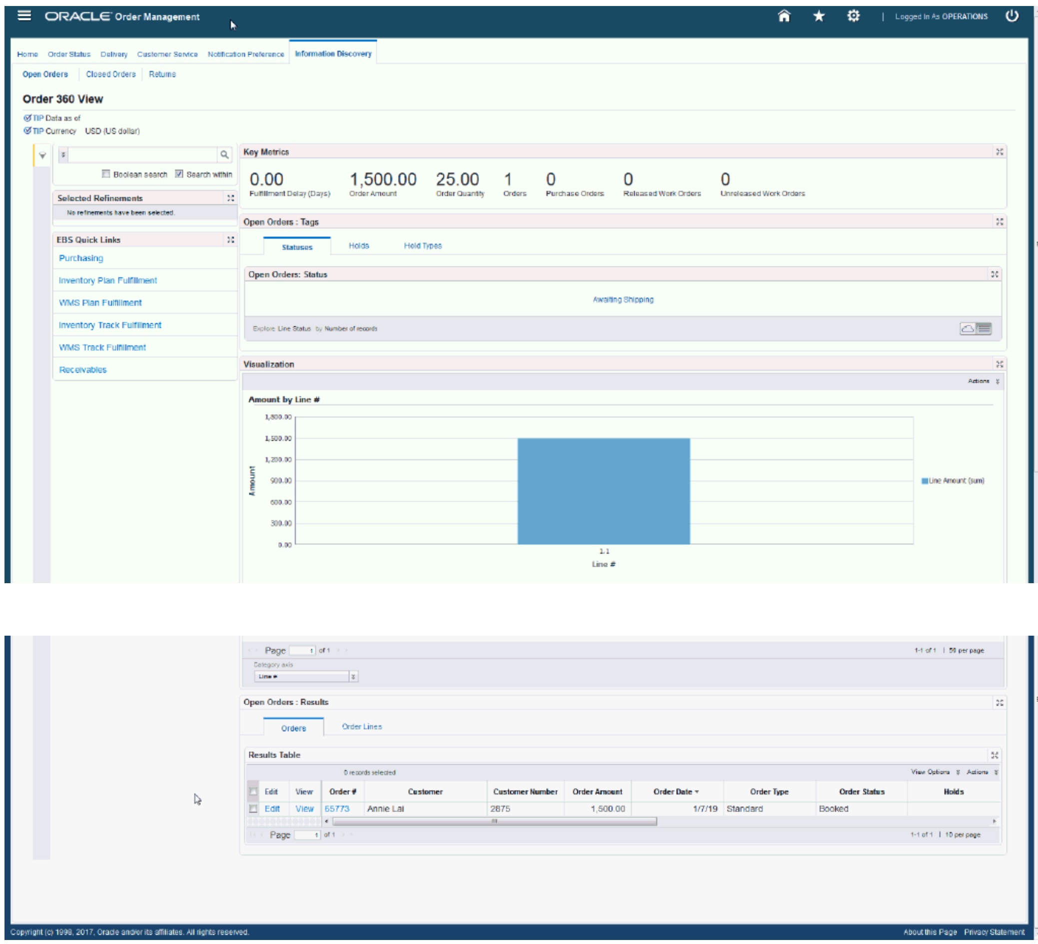
Region	Components

Open Orders: Results (tabbed component container)
 	
Order Lines (tab)
	Open Orders: Results (results table)
	• Column Sets
	  • Main
	  • Customer
	  • Delay and Dates
	  • Others
	  • Order 360 View
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • **Print**
	  • **Export**
	  • **Launch Order Organizer** - When you select this action, all selected order lines display in the 'Lines' tab of the Order Organizer search results form. This enables you to execute additional actions including Book, Price, Mass Change, and so on.
	  • **Launch Scheduling Organizer** - When you select this action, all selected order lines display in the 'Lines' tab of the Scheduling Organizer search results form. This enables you to execute additional actions including Reserve, Schedule, and so on.

Region	Components
	Update Order Lines - When you select this action, the Order Lines html user interface page appears where you can search, view, and perform order line level actions. **Note:** Only order line level actions can be performed. **Order 360 View** - Select this action to open the Order 360 View page. You can view key open order metrics, graphs, and results table information. You can also use the EBS Quick Links to navigate to EBS pages to enter and maintain order and item information. You can also use EBS quick links to view other EID product content, and navigate to those EBS product pages to perform allowed actions. - Links **Display Details Icon** - Select the display details icon to view record details for the selected row. The Record Details window appears and displays Main, Customer, and Delay and Dates information. **Edit** - Select the Edit link to navigate to the Sales Orders form to enter, view, and update sales orders. **View** - Select the View link to navigate to the Sales Order Details page to view order details for the selected order. **Order Number** - Select the Order Number link to navigate to an additional Sales Order Details page to search, view, and perform actions

Region	Components
	on orders and order lines.

When you select the Order 360 View from the Actions link in the Open Orders: Results table, the Order 360 View page appears and displays Order Management data similar to that of the Open Orders page. This page also contains quicklinks components that point to other EID product pages. Click the quick links to navigate to other EID product pages. The following is a display of the Order 360 View page.



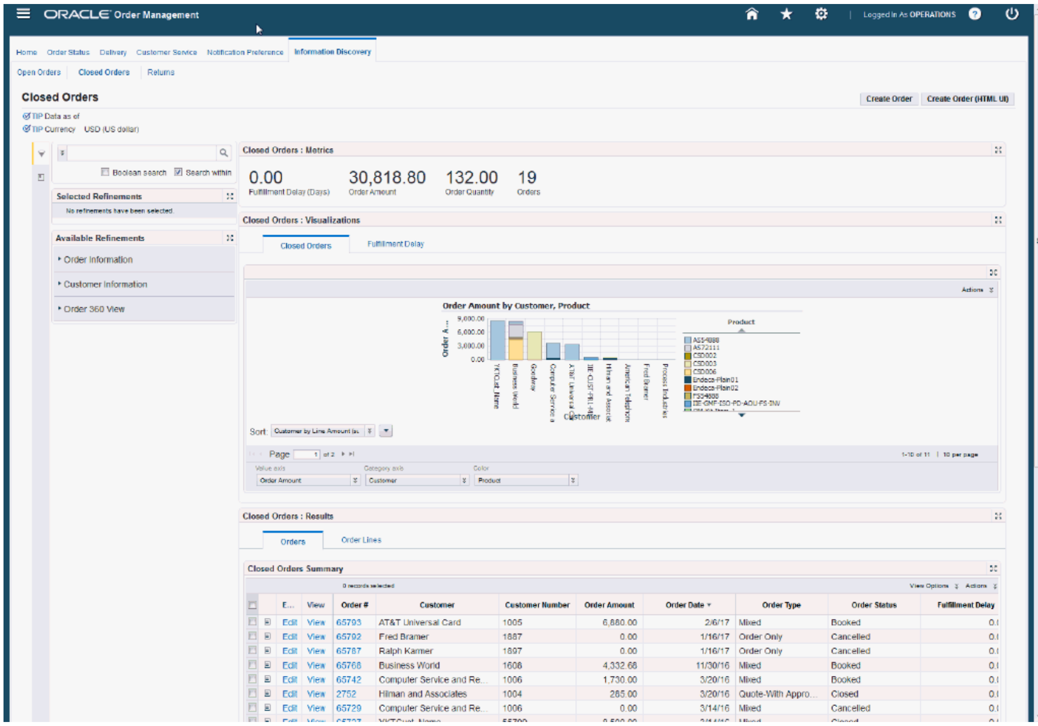
Closed Orders Page

The Endeca Closed Orders page displays dashboard metrics related to fulfillment delays on closed sales order lines. The page displays information and data graphically and in tabular format. The following graphic displays a view of the Endeca Closed

Orders page.

From the Order Information Super User responsibility, navigate to the Closed Orders page:

(N) Order Information > Information Discovery > Closed Orders



When you open the Endeca Closed Orders page under Information Discovery, you can search and filter order fulfillment delay information. You can analyze the data and review closed order line and production metrics, charts, graphs, and tables. You can also click the Create Order button in the top right-hand region of the Open Orders page to launch the Sales Order form and enter new sales order details.

The following table describes the Endeca Closed Orders page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names:
	• Order Information
	• Customer Information
	• Additional Line Attribute Information (Descriptive Flexfields)
	    • Context Value
	    Note: This attribute group contains all segments of the Descriptive Flexfield: 'Additional Line Attribute Information' across all distinct contexts. Users can perform data discovery based on these Descriptive Flexfield segment attributes.
	• Additional Header Information
	    • Context Value
	Note: This attribute group contains all segments of the Descriptive Flexfield: 'Additional Header Information' across all distinct contexts. Users can perform data discovery based on these Descriptive Flexfield segment attributes. Only global DFF elements are displayed along with context value. Other context specific attributes are displayed only upon selecting a specific context.
	Note: The above two Descriptive Flexfield (DFF) attribute groups

Region	Components
	(Line/Header) are visible in the Available Refinements section only if DFFs are enabled in the environment.
Closed Orders: Metrics (summarization bar)	• **Fulfillment Delay (Days)** The average of fulfillment delays for each order line (inclusive of zero values) divided by number of order lines. • **Order Amount** The sum of product of unit selling price and ordered quantity for each order line. **Note:** The order amount for each line is the amount on the order line (referred to as transaction amount in OM Information Discovery for Endeca) converted into the functional currency of the operating unit or the currency specified in OM: Endeca Display Currency. • **Order Quantity** The sum of order quantity for each line. **Note:** The order quantity for each line is the quantity on the order line (referred to as transaction quantity in OM Information Discovery for Endeca) converted into the Primary UOM of the item. • **Orders** Number of order (not order lines).

Region	Components

Closed Orders: Visualizations (tabbed component container)
 	
Closed Orders (tab)
	Order Amount by Customer, Product (chart)
	• Sort Options
	  • Customer
	  • Customer by Line Amount (sum)
	• Dimensions (value axis)
	  • Order Amount
	  • Order Quantity
	• Group Dimensions (category axis)
	  • Customer
	  • Product
	  • Warehouse
	• Series Dimensions (color)
	  • (none)
	  • Product
	  • Customer
	  • Warehouse
	  • Shipment Method
	  • Line Type

Region	Components

Closed Orders: Visualizations (tabbed component container)
 	
Fulfillment Delay (tab)
	Order Amount by Fulfillment Delay, Customer (chart)
	
	• Sort Options
	  • Fulfillment Delay
	  • Fulfillment Delay by Line Amount (sum)
	• Dimensions (value axis)
	  • Order Amount
	  • Order Quantity
	• Series Dimensions (color)
	  • (none)
	  • Customer
	  • Product
	  • Warehouse
	  • Shipment Method
	  • Line Type

Region	Components

Closed Orders: Results (tabbed component container)
 	
Orders (tab)
	Closed Orders Summary (results table)
	
	• View Options
	    • Hide / Show Columns
	    • Sort
	    • Reset table to default
	• Actions
	    • **Print**
	    • **Export**
	    • **Launch Order Organizer** - When you select this action, all selected orders display as selected in the 'Summary' tab of the Order Organizer search results form. This enables you to execute additional actions including Book, Price, Mass Change, and so on.
	    • **Update Orders** - When you select this action, the Order Management page appears where you can search, view, and perform actions on orders for the selected row.
	    • **Order 360 View** - Select this action to open the Order 360 View page. You can view key open order metrics, graphs, and results table information corresponding to the records selected. You can use the EBS Quick Links to navigate to EBS pages to enter and maintain order and item information. You can also use EBS quick links to view other EID product content, and navigate to those EBS product pages to perform allowed actions.

Region	Components
	• Links • **Edit** - Select the Edit link to navigate to the Sales Orders form to enter, view, and update sales orders. • **View** - Select the View link to navigate to the Sales Order Details page to view order details for the selected order. • **Order Number** - Select the Order Number link to navigate to an additional Sales Order Details page to search, view, and perform actions on orders and order lines.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Closed Orders: Results (tabbed component container)

Order Lines (tab)</td><td>Closed Order Lines: Results (results table)

Column Sets
Main
Customer
Delay and Dates
Others
View Options
Hide / Show Columns
Sort
Reset table to default
Actions
Print
Export
Launch Order Organizer - When you select this action, all selected orders display as selected in the 'Lines' tab of the Order Organizer search results form. This enables you to execute additional actions including Book, Price, Mass Change, and so on.
Update Order Lines - When you select this action, the Order Lines page appears where you can search, view, and perform actions on orders and order lines.
Order 360 View - Select this action to open the Order 360 View page. You can view key open order metrics, graphs, and results table information
</td></tr>
</table>

Region	Components

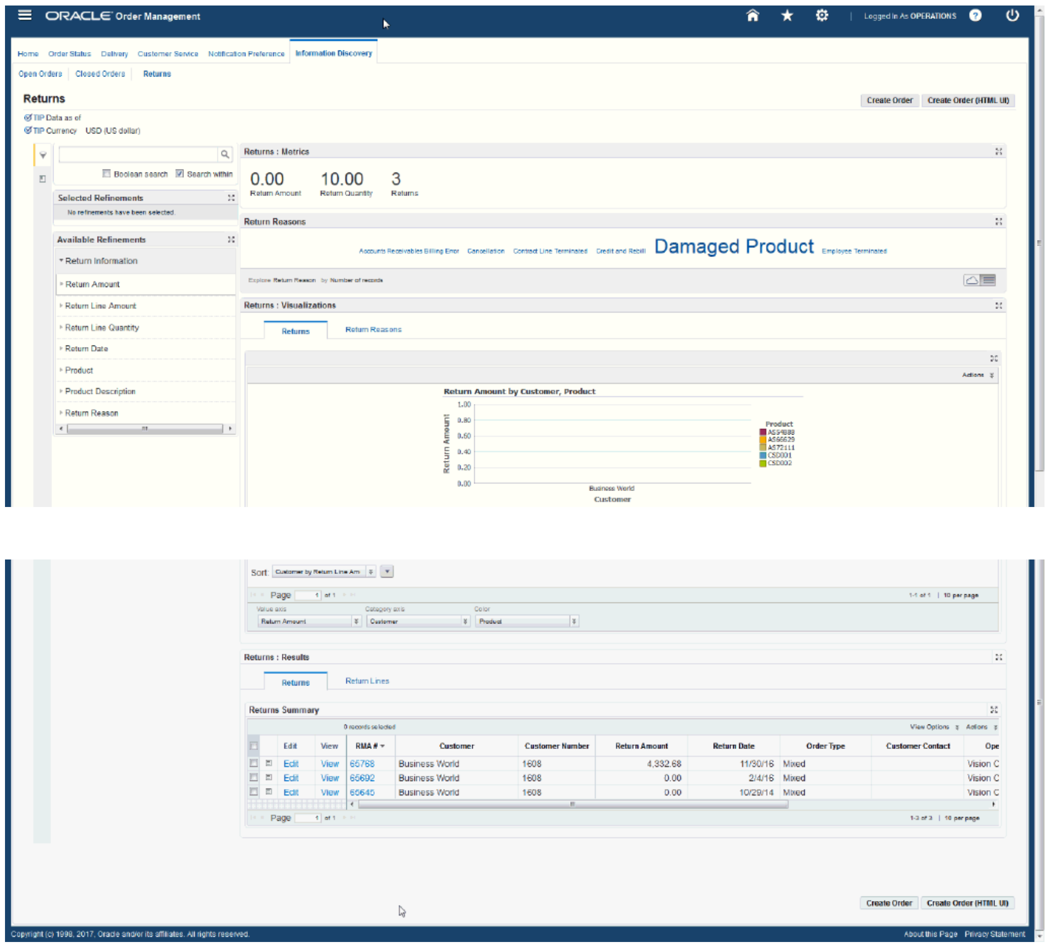
	corresponding to the records selected. You can use the EBS Quick Links to navigate to EBS pages to enter and maintain order and item information. You can also use EBS quick links to view other EID product content, and navigate to those EBS product pages to perform allowed actions.
	
	• Links
	  • **Display Details Icon** - Select the display details icon to view record details for the selected row. The Record Details window appears and displays Main, Customer, and Delay and Dates information.
	  • **Edit** - Select the Edit link to navigate to the Sales Orders form to enter, view, and update sales orders.
	  • **View** - Select the View link to navigate to the Sales Order Details page to view order details for the selected order.
	  • **Order Number** - Select the Order Number link to navigate to an additional Sales Order Details page to search, view, and perform actions on orders and order lines.

Returns Page

The Endeca Returns page displays dashboard metrics related to order returns and reasons. Only fulfilled return lines and their parent returns are considered. The page displays information and data graphically and in tabular format. The following graphic displays a view of the Endeca Returns page.

From the Order Information Super User responsibility, navigate to the Returns page:

(N) Order Information > Information Discovery > Returns



When you open the Endeca Returns page under the Information Discovery tab, you can search and filter various reasons that cause order returns. You can analyze the data and review returned orders and production metrics, charts, graphs, and tables. You can also click the Create Order button in the top right-hand region of the Open Orders page to launch the Sales Order form and enter new sales order details.

The following table describes the Endeca Returns page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names:
	• Return Information
	• Customer Informaton
	• Order Reference Information
	• Additional Line Attribute Information (Descriptive Flexfields)
	  • Context Value
	  Note: This attribute group contains all segments of the Descriptive Flexfield: 'Additional Line Attribute Information' across all distinct contexts. Users can perform data discovery based on these Descriptive Flexfield segment attributes.
	• Additional Header Information
	  • Context Value
	  Note: This attribute group contains all segments of the Descriptive Flexfield: 'Additional Header Information' across all distinct contexts. Users can perform data discovery based on these Descriptive Flexfield segment attributes. Only global DFF elements are displayed along with context value. Other context specific attributes are displayed only upon selecting a specific context.

Region	Components
	Note: The above two Descriptive Flexfield (DFF) attribute groups (Line/Header) are visible in the Available Refinements section only if DFFs are enabled in the environment.
Returns: Metrics (summarization bar)	• **Return Amount** The sum of product of unit selling price and returned quantity for each order line. **Note:** The return amount for each line is the amount on the return line (referred to as transaction amount) converted into the functional currency of the operating unit or the currency specified in OM: Endeca Display Currency. • **Return Quantity** The sum of order quantity for each line. **Note:** Return quantity for each line is the quantity on the order line (referred to as transaction quantity in OM Information Discovery for Endeca) converted into the Primary UOM of the item. • **Returns** Number of return orders (not lines).

Region	Components
Returns: Reasons (tag cloud component)	Top Ten Return Reasons Tag Cloud Component **Note:** The Returns: Reasons tag cloud component displays the top ten return reasons by frequency of occurrence. Return reasons in this component are highlighted in progressively bolder and larger font based on the frequency of occurrence.

Returns: Visualizations (tabbed component container)
 	
Returns (tab)
	Return Amount by Customer, Product (chart)
	• Sort Options
	  • Customer
	  • Customer by Return Line (sum)
	• Dimensions (value axis)
	  • Return Amount
	  • Return Quantity
	• Group Dimensions (category axis)
	  • Customer
	  • Product
	• Series Dimensions (color)
	  • (none)
	  • Product
	  • Customer

Region	Components
Returns: Visualizations (tabbed component container) Return Reasons (tab)	Return Amount by Return Reason, Customer (chart) - Sort Options - Return Reason - Return Reason by Return Line (sum) - Dimensions (value axis) - Return Amount - Return Quantity - Series Dimensions (color) (none) - Customer - Product

Region	Components

Returns: Results (tabbed component container)
 	
Returns (tab)
	Returns Summary (results table)
	• ViewOptions
	  ◦ Hide / Show Columns
	  ◦ Sort
	  ◦ Reset table to default
	• Actions
	  ◦ Print
	  ◦ Export
	  ◦ Launch Order Organizer - When you select this action, all selected orders display as selected in the 'Summary' tab of the Order Organizer search results form. This enables you to execute additional actions including Book, Price, Mass Change, and so on.
	  ◦ Update Returns - When you select this action, the Order Management page appears where you can search, view, and perform actions on orders for the selected row.
	• Hyper Links
	  ◦ Edit - Select the Edit link to navigate to the Sales Orders form to enter, view, and update sales orders.
	  ◦ View - Select the View link to navigate to the Sales Order Details page to view order details for the selected order.
	  ◦ Order Number - Select the Order Number link to navigate to an additional Sales Order Details page

Region	Components
	to search, view, and perform actions on orders and order lines.

Region	Components

Returns: Results (tabbed component container)
 	
Return Lines (tab)
	Returns: Results (results table)
	• Column Sets
	  • Main
	  • Customer
	  • Order Reference
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Launch Order Organizer - When you select this action, all selected orders display as selected in the 'Lines' tab of the Order Organizer search results form. This enables you to execute additional actions including Book, Price, Mass Change, and so on.
	  • Update Return Lines - When you select this action, the Order Lines page appears where you can search, view, and perform actions on orders and order lines for the selected row.
	• Hyper Links
	  • Display Details Icon - Select the display details icon to view record details for the selected row. The Record Details window appears and

Region	Components
	displays Main and Customer information. • Edit - Select the Edit link to navigate to the Sales Orders form to enter, view, and update sales orders. • View - Select the View link to navigate to the Sales Order Details page to view order details for the selected order. • Order Number - Select the Order Number link to navigate to an additional Sales Order Details page to search, view, and perform actions on orders and order lines.

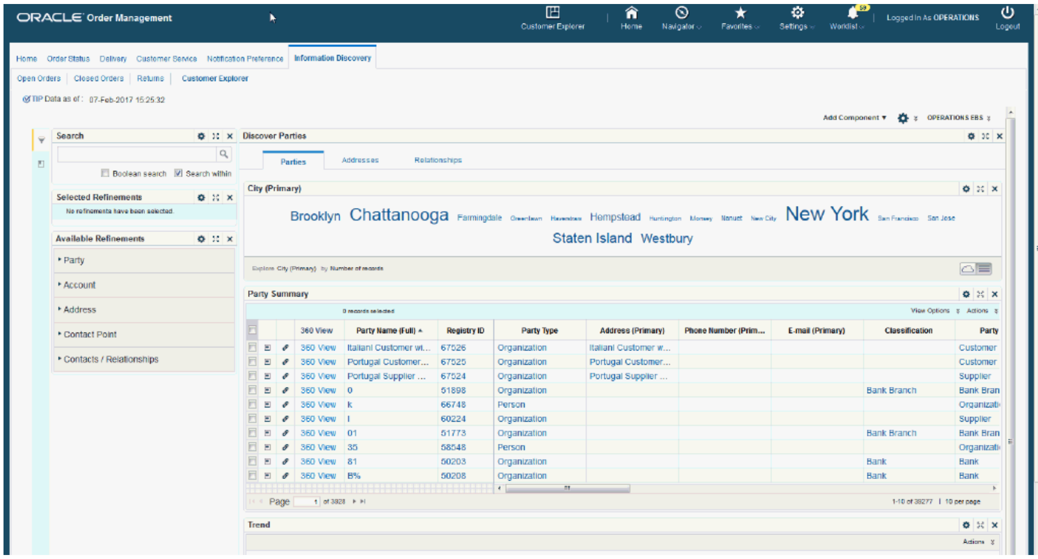
Customer Explorer Page

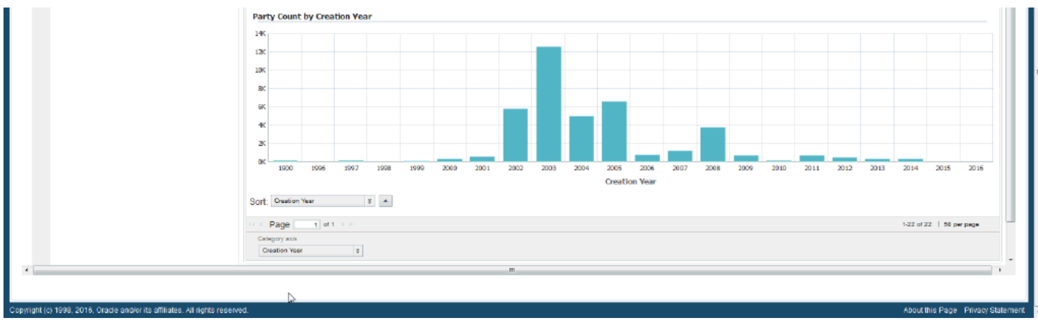
The Customer Explorer page enables you to search and filter data for customer parties using party, account, address and contact point attributes. You can view useful transactional metrics related to Open Claims, Closed Claims, Budgets, Sales Orders, Return Orders, Service Requests, Quotes, and Installed Base for a customer party. You can also drill into the related Information Discovery pages to view and update transactions. Within the Customer Explorer page, you can also access the Order 360 View to open the Transaction Summary window and view transaction metrics for selected parties.

The following graphic displays a partial view of the Customer Explorer page.

From the Order Information Super User responsibility, navigate to the Customer Explorer page:

(N) Order Information > Information Discovery > Customer Explorer





The following table describes the Customer Explorer page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Party • Account • Address • Contact Point • Contacts / Relationships

Region	Components

Discover Parties (tabbed component container)
 	
Parties (tab)
	City (Primary) (tag cloud)
	
	Note: The City (Primary) tag cloud component displays the top ten primary cities where parties to orders reside, by frequency of occurrence. Cities in this component are highlighted in progressively bolder and larger font based on the frequency of occurrence.
	
	Party Summary (results table)
	
	The Party Summary results table displays all party information and contact detail.
	
	• ViewOptions
	    • Hide / Show Columns
	    • Sort
	    • Reset table to default
	• Actions
	    • Print
	    • Export
	    • Compare
	
	Note: You must select a minimum of two rows to open the Compare window to view party summary information.
	
	    • Create Quote
	
	Note: When you select one party (row) and select Create Quote from the Actions drop down list, the application opens the Create

Region	Components

	Quote window to create a quote for that party (customer).
	
	• Links
	  • Details Icon - Select the details icon to display Party Details for that selected row.
	  • 360 View - Select the 360 View to open the Transaction Summary window to view transaction metrics for the selected party.
	
	Note: For a description of the Transaction Summary page, see the table at the end of this section.

	Trend (chart)
	
	The Trend chart displays the Party Count by Creation Year. You can print, export, or save the image of the chart.
	
	• Sort Options
	  • Creation Year
	  • Creation Year by Record Count
	• Group Dimensions (category axis)
	  • Creation Year
	  • Classification
	  • Party Type
	  • Party Usage

Region	Components

Discover Parties (tabbed component container)
 	
Addresses (tab)
	Cities (tag cloud)
	
	Note: The Cities tag cloud component displays the top ten cities that occur within addresses of orders, by frequency of occurrence. Cities in this component are highlighted in progressively bolder and larger font based on the frequency of occurrence.
	
	Map
	
	The Map displays a global view of party locations and address information.
	
	• Map
	    • All Addresses
	    • Primary Addresses
	• Sort Options
	    • Default Sort
	    • Address (set)
	    • Party Name (set)
	    • City (set)
	    • Site Use (set)
	    • Site Number (set)
	    • Phone Number (set)
	
	Trend (chart)
	
	The trend chart displays the number of records by country.
	
	• Sort Options

Region	Components
	- Country - Country by Record Count • Group Dimensions (category axis) - Country - City - County - State/Province - Postal Code - Site Use Address Summary (results table) The Address Summary results table displays party address details. • ViewOptions - Hide / Show Columns - Sort - Reset table to default • Actions - Print - Export - Compare **Note:** You must select a minimum of two rows to open the Compare window to compare

Region	Components
	party address information. • Links • Details Icon - Select the details icon to open the Details window to view Party Address details for that selected row.

Region	Components

Discover Parties (tabbed component container)
 	
Relationships (tab)
	Cities (tag cloud)
	
	Note: The Cities tag cloud component displays the top ten cities that occur within contacts and relationships of order parties, by frequency of occurrence. Cities in this component are highlighted in progressively bolder and larger font based on the frequency of occurrence.
	
	Job Title (tag cloud)
	
	Note: The Job Title tag cloud component displays the top ten job titles within contacts and releationships of order parties, by frequency of occurrence. Job titles in this component are highlighted in progressively bolder and larger font based on the frequency of occurrence.
	
	Contacts / Relationships Summary (results table)
	
	This results table displays information of a party's relationships and contacts.
	
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare

Region	Components
	Note: You must select a minimum of two rows to open the Compare window to compare party relationships and contacts information. • Links • Details Icon - Select the details icon to open the Details window to view party relationships and contacts information for that selected row.

Transaction Summary Page

The Transaction Summary page enables you to search and filter data for customer parties using party, account, address and contact point attributes. When you click the 360 View link in the Party Summary results table, the Transaction Summary page appears.

Using the responsibility assigned to you, use the Transaction Summary page to analyze data using various metrics, charts, graphs, and tables. The page contains the following regions and components:

Region	Components
Party Name	The name of the party.
Party Type	The type of party.
Registry ID	The registry identifier associated with the party.
Identifying Address	The address of the party.
Tip Data as of:	Tip displays the date on which the data was last refreshed.

Region	Components
Tip Currency:	This displays the currency associated with the party.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Quick Links	The Quick Links region displays links to associated pages. • Click Open Claims to navigate to the Open Claims dashboard. • Click Closed Claims to navigate to the Closed Claims dashboard. • Click Budgets to navigate to the Budgets dashboard. • Click Open Orders to navigate to the Open Orders page. • Click Returns to navigate to the Returns page for Sales Orders. • Click Service Requests to navigate to the Service Requests page. • Click Installed Base to navigate to the Installed Base page. • Click Quotes to navigate to the Manage Quotes page.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Region	Components
Transaction Metrics	Displays the following details: • Open Claim Amount – displays the total of all open claims in the system. • Open Claim Amount Beyond 30 Days – displays all claims that are open for over 30 days (in value). • Closed Claim Amount – displays the total of all closed claims in the system. • Budget Total Earned – displays the total earned across all budgets. • Budget Total Paid – displays the total paid amount across all budgets. • Budget Balance – displays the budget balance, dollars earned by customer but not yet paid. • Open Orders Amount – displays the order amount for the open orders. • Return Orders Amount – displays the order amount for the return orders in the current year. • Number of Open SRs – displays the number of open service requests • Number of Escalated SRs – displays the number of escalated service requests. • Open Quote Amount – displays the quote total of active quotes. • Converted Quote Amount – displays the quote total of quotes that were placed as an order in the current year. • Rejected Quote Amount – displays the quote total of quotes that are not open

Region	Components
	and not converted in the current year. • Number of Items – displays the number of items. • Number of Customer Products – displays the number of customer products. • Up-Sell Target Count – displays the count of up-sell targets. • Cross-Sell Target Count – displays the count of cross-sell targets.

Region	Components

Open Amount	Displays data in the following tabs:
	• Chart – displays Open Claim Amount (sum), Open Orders Amount (sum), and Open Quote Amount (sum) by Operating Unit.
	• Pivot – displays the following details for the Operating Unit:
	  • Open Orders Amount (sum)
	  • Return Orders Amount (sum)
	  • Number of Open SRs (sum)
	  • Number of Escalated SRs (sum)
	  • Number of Items (sum)
	  • Number of Customer Products (sum)
	  • Up-sell Target Count (sum)
	  • Cross-sell Target Count (sum)
	  • Open Quote Amount (sum)
	  • Converted Quote Amount (sum)
	  • Rejected Quote Amount (sum)
	  • Budget Total Earned (sum)
	  • Budget Total Paid (sum)
	  • Budget Balance (sum)
	  • Open Claim Amount (sum)
	  • Closed Claim Amount (sum)
	  • Open Claim Amount Beyond 30

Region	Components
	Days (sum) **Note:** You can print or export the details of the pivot table.

Oracle Order Management Information Discovery Plus Product Configuration

Setting Up Oracle Order Management Information Discovery Plus

The Oracle Order Management product configuration setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Order Management Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 24-52 by assigning UMX roles and updating access grants.
2. Schedule Setup for Full Endeca Refresh, page 24-53.
3. Set Profile Options, page 24-55 for Oracle Order Management.
4. Complete Post Installation Steps, page 24-56 for Oracle Order Management.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Order Management Information Discovery Plus

As part of the Oracle E-Business Suite-EID integration for the Oracle Order Management application, the following UMX Roles are provided:

UMX Role	Internal Code Name
Order Management Endeca Access Role	UMX|ONT_ENDECA_ACCESS_ROLE
Order Management HTML User Interface Access Role	UMX|ONT_ENDECAHTML_ACCESS_ROLE
Order Mgmt Endeca Role for Customer Explorer	UMX|ONT_ENDECA_ICX_ACCESS_ROLE

You must add the UMX roles 'Order Management Endeca Access Role' and 'Order Management HTML User Interface Access Role' to enable Endeca menus for the Order Information Super User responsibility and Order Management HTML User Interface responsibility (or any other custom responsibility which is using the Order Information Portal menu). You must assign these UMX roles to the Order Information Portal responsibility. When these UMX roles are assigned to the Order Information Portal, the Information Discovery tab will be visible.

If you want to use the Endeca-related roles with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process or when adding the role to the responsibility.

Permission Sets	Internal Code Name
Order Management Endeca Pages Access	ONT_ENDECA_ACCESS_PS
Order Management HTML User Interface Access	ONT_ENDECAHTML_ACCESS_PS
Order Mgmt Permission Set for Customer Exp	ONT_CUST_EXP_PS

Complete the following steps to enable Endeca Menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.
2. Update the following grants:
   - ONT_ENDECA_ACCESS_GRANT
   - ONT_ENDECA_CUST_EXP_GRANT

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

> **Note:** You must add the 'Orders, Returns' function to the 'Order Information Super User' responsibility to access the Sales Order windows from the Results Set table.

Scheduling Setup for Endeca Refresh

The initial data upload for Oracle Order Management is complete when the Full graph is run as described in the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.

3. Select the New Schedule link.

4. Enter a Description for the schedule.

5. Select Periodic as the Type.

6. Select by interval as the Periodicity.

7. Enter a start date and time in the Not active before date/time field.

8. Enter an end date and time in the Not active after date/time field.

9. Enter a value in the Interval (minutes) field.

10. Ensure you select the Fire misfired event as soon as possible check box.

11. Select Start a graph from the Task Type list.

12. Specify Sandbox = 'ont', and then specify the graph for schedule to run. For example:

    - **FullLoadConfig.grf** - this graph loads all Endeca page metadata as well as order line transaction data, along with necessary audit information.

    - **IncrementalLoadConfig.grf** - this graph loads incrementally changed order line transaction data, along with necessary audit information.

      Important: Customers should define data load schedules based on the FullLoadConfig.grf and IncrementalLoadConfig.grf graphs.

      - Data deleted in EBS (Order Management) will not be removed from Endeca by running Incremental Graph. You must run FullLoadConfig.grf graph to remove all the data from Endeca and then reload all data. Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system.

      - FullLoadConfig.grf is designed to create (and reset) the Endeca data domain for Order Management and perform the initial data load. IncrementalLoadConfig.grf is designed to transfer the updates from EBS Order Management into Endeca as of the completion of the previous data load. You must evaluate your requirements and carefully create the data refresh schedule. Such a schedule is typical and most likely created based on IncrementalLoadConfig.grf rather than the FullLoadConfig.grf.

- You should allow sufficient time between two successive runs of a given graph (either FullLoadConfig.grf or IncrementalLoadConfig.grf) when defining the schedule. The time gap in the schedule must be greater than what the graph itself takes to complete. Failure to adhere to this guideline will result in excessive and wasteful computational load on hardware resources.

13. Click Create to set the scheduler.

Profile Options for Oracle Order Management Information Discovery Plus

Set the optional site level profile option OM: Endeca Display Currency to convert the transaction amount for all orders into the specified currency:

Profile Option Name	Description
OM: Endeca Display Currency	This optional site-level profile option controls the conversion of the transaction amount for all orders into the specified currency.
OM: Days for Endeca Full Data Load	This optional site-level profile option controls the number of days that the full load graph pulls data. The default value is Null. If the value is Null, then full load graph will pull data for the previous 90 days. You can change this value to any positive numeric value.
OM: Maximum Attachment Size for Information Discovery Load (kb)	This optional site-level profile option controls the volume in kilobytes (kb) of line level attachment text to be loaded into Endeca during ETL.

OM: Endeca Display Currency - If a currency is specified in this optional profile option, then the transaction amount for all orders will be converted (if required) into the specified currency. If a currency is not specified in this profile option, then the transaction amount for all orders will be converted (if required) into the functional currency of the legal entity.

> **Note:** You can specify a currency in this profile option if there are users who have access to orders created in legal entities with different functional currencies. Once a currency is selected, Order Amounts on the Order Management Information Discovery Plus pages are converted into that currency at the exchange rate available in Oracle General Ledger tables on the day of the Ordered Date. If users of OIP have access to more than one operating unit, and each operating unit has its own different functional currency, then you can set this profile option to the appropriate common currency according to business requirements. If a currency is not specified in the profile option and there are multiple currencies for a user, then the Tip Text displays 'Currency: Multiple' and currency is added as a filter in the Available Refinements component for users with access to orders in multiple currencies, and they can filter by currency if desired.

OM: Maximum Attachment Size for Information Discovery Load (kb) - This profile option is a site-level profile option and displays numeric values for volume in kilobytes (kb) of line level attachment text to be loaded into Endeca during ETL. A blank or null value is equivalent to a zero value.

Post Installation Steps for Oracle Order Management Information Discovery Plus

Descriptive Flexfield Attribute Groups

The enabled attributes of the descriptive flexfields (DFF) 'Additional Line Attribute Information' and 'Additional Header Information' automatically display within the guided navigation portlet under the dynamically created attribute group 'Additional Information'. You can refine each of the attributes with specific search and selection requirements. Based on customer preferences and requirements, when implementing Oracle Order Management Information Discovery Plus, you can:

1. Add the dynamically created attribute group (Additional Line Attribute Information) as a new column set to the Endeca results tables.

   > **Note:** The Additional Header Information attribute group cannot be added to the Orders tab of the results table.

2. Change the default style of descriptive flexfield attribute filters in the guided navigation component configuration. For example, you can modify 'List of Values' to 'Range Filters' for numeric attributes.

Views and Joins for Oracle Order Management Information Discovery Plus

The following views are used by the ETL layer in Endeca to load Oracle Order Management data to the Endeca data domain:

View Name	Purpose
OE_ENDECA_RETURNS_V	Loads Return Order Lines' data
OE_ENDECA_FULFILL_DELAY_V	Loads Fulfillment Analysis Information for open and closed lines.

Menus for Oracle Order Management Information Discovery Plus

Oracle Order Management integration includes the following user menu functions:

User Function Name	Function Name
Information Discovery	ONT_ENDECA_DISCOVERY
Information Discovery Page - Open Orders	ONT_ENDECA_OPN_ORDR_PG
Information Discovery Page - Fulfillment Delay	ONT_ENDECA_FULFILL_DELAY_PG
Information Discovery Page - Returns	ONT_ENDECA_RETURNS_PG
Transaction Summary Page (From OM)	ONT_IMC_TRANS_ENDECA_METRICS
Endeca Information Discovery Widget - Open Orders	ONT_ENDECA_OPN_ORDR
Endeca Information Discovery Widget - Fulfillment Delay	ONT_ENDECA_FULFILL_DELAY
Endeca Information Discovery Widget - Returns	ONT_ENDECA_RETURNS
Endeca 360 View Widget	ONT_ENDECA_360_VIEW

User Function Name	Function Name
Endeca 360 View Page	ONT_ENDECA_360_VIEW_PG
Endeca 360 View Widget Closed	ONT_ENDECA_360_CLOSED
Order Management Endeca Actions Delegator Page	ONT_ENDECA_ACTIONS_DELEGATOR
Scheduling Organizer	ONT_OEXOEORD_SCH
Endeca 360 View HTML UI Page	ONT_ENDECA_360_VIEW_HTML_PG
Endeca 360 View Close Page	ONT_ENDECA_360_VIEW_CL_PG
Endeca 360 View HTML Close Page	ONT_ENDECA_360_CLOS_HTML_PG
Order Organizer	ONT_OEXOEORD_SUMMARY
Sales Orders	ONT_OEXOEORD

Customer Explorer

Customer Explorer Product Configuration

Once you have completed installation and common configurations as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), you must complete the Customer Explorer product configuration setup as detailed in this section.

Setting up Customer Explorer

1. Add the UMX role IMC Endeca Access Role (UMX|IMC_TRANS_ENDECA_ACCESS_ROLE) to enable the Customer Explorer global link for the IMC application responsibility, or any other custom responsibility using the same menu. When this UMX role is assigned to the responsibility, the customer explorer global menu displays.

2. Update the grants associated with role IMC Endeca Access Role to have the right responsibility context set. For IMC Endeca Access Role, click the update icon for grant IMC_TRANS_ENDECA_ACCESS_GRANT and in the Security Context region of the update Grant page enter IMC responsibility as the Responsibility. For IMC Endeca Access Role, click on the update icon for grant IMC_ENDECA_INT_PROD_ACCESS_GRANT and in the Security Context region of the update Grant page enter IMC responsibility as the Responsibility.

3. To access the related Information Discovery pages (Open Claims, Closed Claims, Budgets, Sales Orders, Return Orders, Service Requests, Quotes and Installed Base) from Customer Explorer Page, complete the following additional steps:

4. Assign the Roles below (additionally, subject to the licensed Oracle Information Discovery page) to the IMC responsibility:

   - CS Endeca Access Role/UMX|CS_ENDECA_ACCESS_ROLE (Services)

   - CSI Endeca Access Role/UMX|CSI_ENDECA_ACCESS_ROLE (Installed Base)

   - Channel Endeca User Role/UMX|OZF_ENDECA_ACCESS_ROLE (Channel Revenue Management)

   - Order Management Endeca Access Role/UMX|ONT_ENDECA_ACCESS_ROLE (Order Management)

   - Quoting Endeca Quotes Access Role/UMX|QOT_ENDECA_QUOTES_ACCESS_ROLE (Quoting)

5. When you add the role to the responsibility, you must also update the associated grant for the product-specific Information Discovery related roles to reference the specific responsibility as the security context. You need a separate grant for each responsibility to which you are adding the role, so in this case you must duplicate the shipped grant rather than updating it. Create a copy of existing and in the Security Context region of the Update Grant page enter IMC responsibility as the Responsibility.

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: Roles in Customer Explorer , page 24-60

   See: Grants in Customer Explorer, page 24-61

   See: Permission Sets in Customer Explorer, page 24-61

   See: Appendix C: Adding Roles to Responsibilities and Setting Security Context in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1)

6. Set up the profiles HZ_ENDECA_DISPLAY_CURRENCY and HZ_CURR_CONVERSION_TYPE.

   See: Profiles in Customer Explorer, page 24-60

Profiles in Customer Explorer

Customer Explorer provides the following profile options:

- HZ: Endeca Display Currency (HZ_ENDECA_DISPLAY_CURRENCY) – use this profile option to convert the transaction amount currency to the currency specified in this profile using the conversion type mentioned in profile HZ: Currency Conversion Type. You can update this profile only at the site level.

- HZ: Currency Conversion Type (HZ_CURR_CONVERSION_TYPE) – use this profile option to define the conversion type to be used in the profile HZ: Endeca Display Currency. You can update this profile only at the Site level.

Roles in Customer Explorer

Customer Explorer provides the following roles:

Role Name	Role ID	Application
IMC Endeca Access Role	UMX|IMC_TRANS_ENDECA_ACCESS_ROLE	Customer Explorer

Grants in Customer Explorer

Customer Explorer provides the following grants:

Name	Set	Grantee Type	Grantee
IMC_TRANS_ENDECA_ACCESS_GRANT	IMC Endeca Access Permission Set	Group Of Users	IMC Endeca Access Role
IMC_ENDECA_INT_PROD_ACCESS_GRANT	Customer Explorer Integrated Product Menu	Group Of Users	IMC Endeca Access Role

Permission Sets in Customer Explorer

The following permission sets are available in Customer Explorer:

Permission Set Name	Permission Set ID	Application
IMC Endeca Access Permission Set	IMC_TRANS_ENDECA_ACCESS_PS	Customer Explorer
Order Mgmt Permission Set for Customer Exp	ONT_CUST_EXP_PS	Order Management Customer Explorer

Running the Full Load Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Customer Explorer Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select imc from the Sandbox list, based on the module for which you are running the full load.
13. Select graph/FullLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler for Incremental Refresh

Once the Full graph is run in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), initial data load for Oracle Customer Explorer is complete. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server.

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.

3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Customer Explorer Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select imc from the Sandbox list, based on the module for which you are running the full load.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Customizing Data Loads

As an option, only a subset of the orders and lines created in the EBS environment can be loaded into the Endeca data domain by customizing the hook package 'oe_endeca_hook'.The package 'oe_endeca_hook' contains the following procedures:

- APPEND_WHERE_CLAUSE
- APPEND_WHERE_CLAUSE_RETURNS
- APPEND_WHERE_CLAUSE_INCR
- APPEND_WHERE_CLAUSE_INCR_RET

The procedure APPEND_WHERE_CLAUSE must be modified to restrict the data set loaded using the Full Load graph for the Open and Closed orders pages. The procedure APPEND_WHERE_CLAUSE_RETURNS must be modified to restrict the data set loaded using the Full Load graph for the Returns page.

Similarly, the procedure APPEND_WHERE_CLAUSE_INCR must be modified to restrict the data set loaded using the Incremental Load graph for the Open and Closed orders pages. The procedure APPEND_WHERE_CLAUSE_INCR_RET must be modified to restrict the data set loaded using the Incremental Load graph for the Returns page.

> **Additional Information:** For examples and detailed instructions on the syntax to be followed while building the custom logic, refer to the package 'OE_ENDECA_HOOK' that is included in the file OEXHENDB.pls

25

Oracle Outsourced Manufacturing for Discrete Industries Plus

This chapter covers the following topics:

- Overview
- Outsourced Manufacturing For Discrete Industries Plus Dashboard
- Setting Up Oracle Outsourced Manufacturing for Discrete Industries Plus
- Setup and Configuration Steps
- Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Outsourced Manufacturing For Discrete Industries Plus
- Loading Outsourced Manufacturing Data into the Endeca Data Domain
- Setting Up the Scheduler for Endeca Full Refresh
- ETL Parameters for Outsourced Manufacturing For Discrete Industries Plus
- Views and Joins for Outsourced Manufacturing For Discrete Industries Plus
- Menus for Endeca Outsourced Manufacturing For Discrete Industries Plus

Overview

You can use Oracle Outsourced Manufacturing For Discrete Industries Plus to search and filter open subcontract orders, delayed subcontract orders, impacted customer orders, open replenishments, delayed replenishments, on-hand and in-transit inventory values, component consumption adjustments, quality rejects, rejected value, uninvoiced assemblies, and components. Using the Outsourced Manufacturing For Discrete Industries Plus Dashboard, you can review and analyze data using Key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using the Outsourced Manufacturing For Discrete Industries Plus Dashboard utilizing Endeca Information Discovery (EID) design tools. This page is hosted in an EID environment, and called from new container pages in EBS. In Oracle

Subcontracting, the following Outsourced Manufacturing For Discrete Industries Plus Dashboard enables search functions using Endeca Information Discovery integration:

- **Outsourced Manufacturing For Discrete Industries Plus Dashboard**: This page lets you quickly assess the state of the outsourcing process by identifying where component shortages occur, identifying assemblies and Manufacturing Partners (MP) with the most frequent scraps and production rejects and reasons, and identifying the top exception causes and corrective actions to take. Buyers can monitor payments due to the manufacturing partners and take appropriate actions to reduce payment backlog to promote positive supplier relationships. Buyers can also monitor on-hand inventory of manufacturing partners and take appropriate actions for better inventory and working capital management. The Outsourced Manufacturing For Discrete Industries Plus Dashboard displays metrics, charts, tag clouds, and results tables.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

Oracle Outsourced Manufacturing For Discrete Industries Plus User Interface

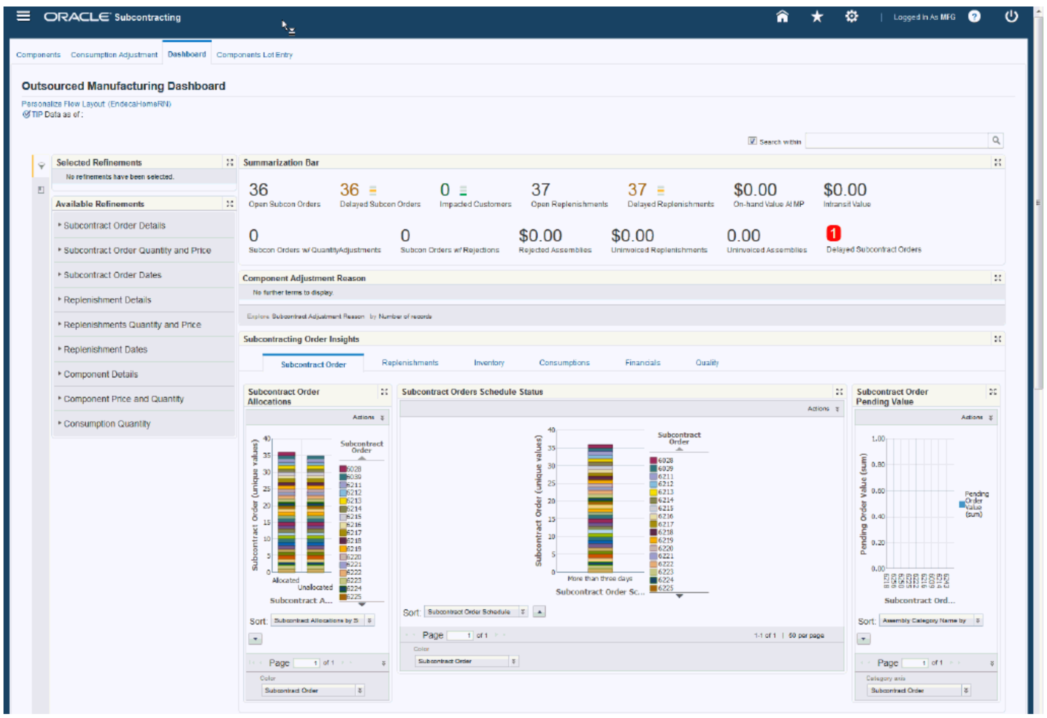
Outsourced Manufacturing For Discrete Industries Plus Dashboard

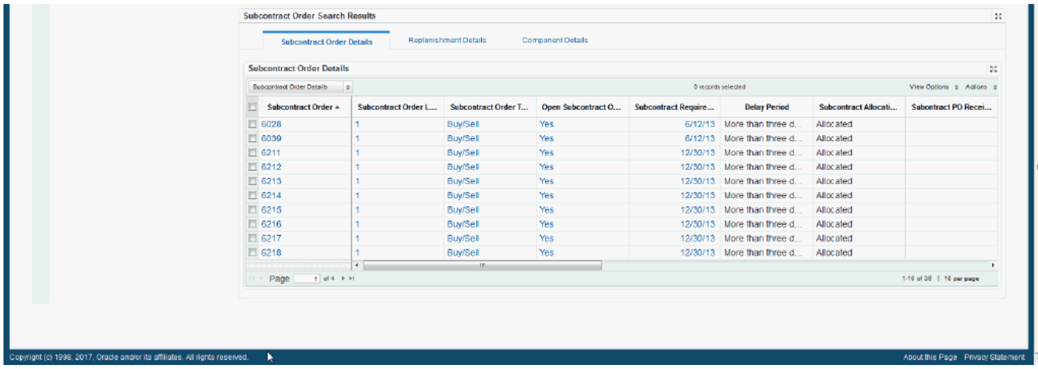
The Outsourced Manufacturing For Discrete Industries Plus Dashboard for Oracle Subcontracting lets you monitor the health of your outsourcing process by searching for and displaying outsourced manufacturing information. Using Available Refinements, you can search on Organization Details, Subcontract Order Details, Replenishment Details, Component Details, Consumption Details, and Quality Details. You can view subcontracting metrics, charts, tag clouds, and transaction results tables. The following is a display of the Outsourced Manufacturing For Discrete Industries Plus Dashboard.

From the Subcontracting Super User responsibility, navigate to the Outsourced Manufacturing For Discrete Industries Plus Dashboard:

(N) Subcontracting > Workbench > Dashboard (tab)

(N) Subcontracting Super User > Outsourced Manufacturing Information Dashboard





The following describes the Outsourced Manufacturing For Discrete Industries Plus Dashboard regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Subcontract Order Details • Subcontract Order Quantity and Price • Subcontract Order Dates • Organization Details • Replenishment Details • Replenishments Quantity and Price • Replenishment Dates • Component Details • Component Price and Quantity • Consumption Details • Consumption Quantity • Quality Details • Quality Quantity and Price • Quality Dates

Region	Components
Summarization Bar **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning - Gray: Normal - Green: Good	• Open Subcontract Orders • Delayed Subcontract Orders • Impacted Customers • Open Replenishments • Delayed Replenishments • On Hand Value At MP • Intransit Value • Subcontract Orders with Quantity Adjustments • Subcontract Orders with Rejections • Rejected Assemblies • Uninvoiced Replenishments • Uninvoiced Assemblies • Delayed Subcontract Orders
Component Adjustment Reason (tag cloud component)	Top Ten Component Adjustment Reason Tag Cloud Component **Note:** The Component Adjustment Reason tag cloud component displays the top ten Component Adjustment Reasons by frequency of occurrence.

Region	Components

Subcontracting Order Insights (tabbed component container)
 	
Subcontract Order (tab)
	Subcontract Order Allocations (chart)
	• Sort Options
	  • Subcontract Allocations
	  • Subcontract Allocations by Subcontract Order (count distinct)
	• Series Dimension (color)
	  • (none)
	  • MP Organization Code
	  • Subcontract Order
	  • Component Category Name
	  • Assembly Category Name
	  • Is Customer Order Associated
	
	Subcontract Orders Schedule Status (chart)
	• Sort Options
	  • Subcontract Order Schedule Status
	  • Subcontract Order Schedule Status by Subcontract Order (unique values)
	• Series Dimension (color)
	  • Is Customer Order Associated
	  • Customer Name
	  • Subcontract Order
	  • MP Organization Code
	  • OEM Organization Code

Region	Components

	- Assembly Name
	- Customer Sales Order
	
	Subcontract Order Pending Value (chart)
	- Sort Options
	  - Assembly Category Name
	  - Assembly Category Name by Pending Order Value (sum)
	- Dimensions (category axis)
	  - Assembly Category Name
	  - Assembly Name
	  - Subcontract Order
	  - OEM Organization Code
	  - MP Organization Code

Region	Components

Subcontracting Order Insights (tabbed component container)
 	
Replenishments (tab)
	Replenishment Allocations (chart)
	• Sort Options
	    • RSO Allocations
	    • RSO Allocations by RSO Number (unique value)
	• Series Dimension (color)
	    • (none)
	    • Component Category Name
	    • Component Name
	    • OEM Organization Code
	    • MP Organization Code
	    • Assembly Category Name
	
	Replenishments Schedule Status (chart)
	• Sort Options
	    • Shipments Schedule Status
	    • Shipments Schedule Status by RSO Number (unique values)
	• Series Dimension (color)
	    • (none)
	    • OEM Organization Code
	    • Component Name
	    • MP Organization Code
	    • Component Category Name

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td></td><td>Is Customer Order Associated
Dropship PO Supplier</td></tr>
<tr><td>Subcontracting Order Insights (tabbed component container)

Inventory (tab)</td><td>Component Value (chart)
Sort Options
MP Organization Code
MP Organization Code by On Hand Value at MP (sum)
MP Organization Code by In Transit Value (sum)
Series Dimension (color)
(none)
OEM Organization Code
Component Name
Component Category Name
Component Details (cross tab)
Column Sets
Component Overview
Component Quantity and Price Details</td></tr>
</table>

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Subcontracting Order Insights (tabbed component container)

Consumptions (tab)</td><td>Consumption Overview (chart)
Sort Options
Subcontract Adjustment Reason
Subcontract Adjustment Reason by Adjustment Value (sum)
Series Dimension (color)
(none)
OEM Organization Code
Component Name
Component Category Name
Consumption Details (cross tab)
Column Sets
Adjustment Details
Adjustment Quantity</td></tr>
</table>

Region	Components

Subcontracting Order Insights (tabbed component container)
 	
Financials (tab)
	Uninvoiced Replenishments (chart)
	• Sort Options
	  • Component Category Name
	  • Component Category Name by Uninvoiced Replenishment (sum)
	• Dimensions (category axis)
	  • Component Category Name
	  • Component Name
	  • OEM Organization Code
	  • MP Organization Code
	
	Uninvoiced Assemblies (chart)
	• Sort Options
	  • Assembly Category Name
	  • Assembly Category Name by Uninvoiced Assemblies (sum)
	• Dimensions (category axis)
	  • Assembly Category Name
	  • Assembly Name
	  • Subcontract Order
	  • OEM Organization Code
	  • MP Organization Code

Region	Components

Subcontracting Order Insights (tabbed component container)
 	
Quality (tab)
	Reject Reasons (chart)
	• Sort Options
	  • MP Organization Code
	  • MP Organization Code by Subcontract Rejected Assemblies (sum)
	• Dimensions (category axis)
	  • MP Organization Code
	  • Assembly Name
	  • OEM Organization Code
	  • Assembly Category Name
	• Series Dimensions (color)
	  • (none)
	  • Rejection Reason
	
	Quality Details (cross tab)
	• Column Sets
	  • Subcontract Order Details
	  • Quality Inspection

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Subcontract Order Search Results (tabbed component container)

Subcontract Order Details (tab)</td><td>Subcontract Order Details (results table)
Column Sets
Subcontract Order Details
Work Order Details
Customer Sales Order Details
Assembly Details
Organization Details
Subcontract Quantities and Price</td></tr>
<tr><td>Subcontract Order Search Results (tabbed component container)

Replenishment Details (tab)</td><td>Replenishment Details (results table)
Column Sets
RSO Details
RSO Quantities and Price
Organization Details
Dropship Details</td></tr>
<tr><td>Subcontract Order Search Results (tabbed component container)

Component Details (tab)</td><td>Component Details (results table)
Column Sets
Component Details
Component Quantities and Prices</td></tr>
</table>

Oracle Outsourced Manufacturing For Discrete Industries Plus Product Configuration

Setting Up Oracle Outsourced Manufacturing for Discrete Industries Plus

The Oracle Outsourced Manufacturing For Discrete Industries Plus application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Outsourced Manufacturing for Discrete Industries Plus, you must complete the following steps:

1. Set Access Control, page 25-15 by assigning UMX roles and updating access grants.
2. Load Outsourced Manufacturing (Subcontracting) data to the Endeca Data Domain, page 25-16 by running graphs provided by Subcontracting.
3. Schedule Setup for Full Endeca Refresh, page 25-16.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Outsourced Manufacturing For Discrete Industries Plus

As part of the Oracle E-Business Suite-EID integration for the Oracle Outsourced Manufacturing For Discrete Industries Plus application, the following UMX Role is provided:

UMX Role	Internal Code Name
Subcontracting Endeca Access Role	UMX|JMF_SHIKYU_ENDECA_ACCESS_ROLE

You must add the new UMX role 'Subcontracting Endeca Access Role' (Internal Code Name: UMX|JMF_SHIKYU_ENDECA_ACCESS_ROLE) to enable Endeca menus for the Subcontracting Super User responsibility (or any other custom responsibility which is using the same menu). You must assign this UMX role to the responsibility. When this UMX role is assigned to the Subcontracting Super User responsibility, the Endeca Search page appears.

If you want to use the Endeca-related role with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process instead of while you are adding the role to the responsibility.

Permission Set	Internal Code Name
Subcontracting Endeca Permission Set	JMF_SHIKYU_ENDECA_ACCESS_PS

Complete the following steps to enable Endeca Menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.

2. Update JMF_SHIKYU_ENDECA_ACCESS_GRANT Grant.

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Loading Outsourced Manufacturing Data into the Endeca Data Domain

Clover ETL within Endeca queries Subcontracting Views and does a full data load to the Subcontracting data domain in Endeca. After the first data load, full data load or incremental data load can be performed periodically. Incremental data load will update all the records in Endeca Subcontracting data domain which were updated in EBS after the last load. After the data has been loaded in the data domain, it can be queried and shown in the Subcontracting pages.

Subcontracting Data Sources in the Subcontracting Data Domain

The following data source is defined in the Subcontracting data domain in Endeca and is used to query data for Subcontracting page. The data source includes:

- **jmf** - This data source queries data for the Subcontracting page.

Setting Up the Scheduler for Endeca Full Refresh

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.

2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select the graph for schedule to run. I.e. Full.grf/incremental.grf.
13. Click Create to set the scheduler.

ETL Parameters for Outsourced Manufacturing For Discrete Industries Plus

You can load data to the JMF data domain by running graphs provided by Subcontracting.

To load data to the JMF data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under Subcontracting.
2. Graphs to load data include:
   - **FullLoadConfig.grf**: This graph loads all Subcontracting data.

     Note: Data deleted in EBS (Subcontracting) will not be removed from Endeca by running Incremental Graph. You must run Full.grf graph to remove all the data from Endeca and reload everything.

   - **IncrementalLoadConfig.grf**: This graph loads changed Subcontracting data.

Note: If you are loading data for the first time, then run FullLoadConfig.grf only. You can run other graphs according to your requirements. Run IncrementalLoadConfig.grf periodically. You can set up this graph from the Scheduling tab.

Views and Joins for Outsourced Manufacturing For Discrete Industries Plus

The following views are used by the ETL layer in Endeca to load Subcontracting data to the Endeca data domain:

View Name	Purpose
JMF_EID_SUBCONDET_V	Loads subcontracting order and replenishments data.
JMF_EID_SUBCONADJ_V	Loads adjustments data.
JMF_EID_SUBCONQUALITY_V	Loads quality inspection data.

Menus for Endeca Outsourced Manufacturing For Discrete Industries Plus

Oracle Outsourced Manufacturing For Discrete Industries Plus integration includes nine new user menu functions as follows:

User Function Name	Function Name
Subcontracting Endeca Home Page	JMF_SHIKYU_ENDECA_HOME

26

Oracle Process Manufacturing Information Discovery Plus

This chapter covers the following topics:

Overview

You can use Oracle Process Manufacturing (OPM) Information Discovery to search and filter batch status, batch delays, ingredient and resource shortage, quantity of scraps, quality sample results, and batch yield information. Using the Process Manufacturing dashboard pages, you can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables. You can search using OPM pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS. In OPM, the following region and pages enable search functions using Endeca Information Discovery integration:

Batch Search Page: This page displays the complete set of process batches with any of the following status:

- WIP
- Pending
- Completed

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Process Manufacturing Information Discovery Plus application. This supplements the information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

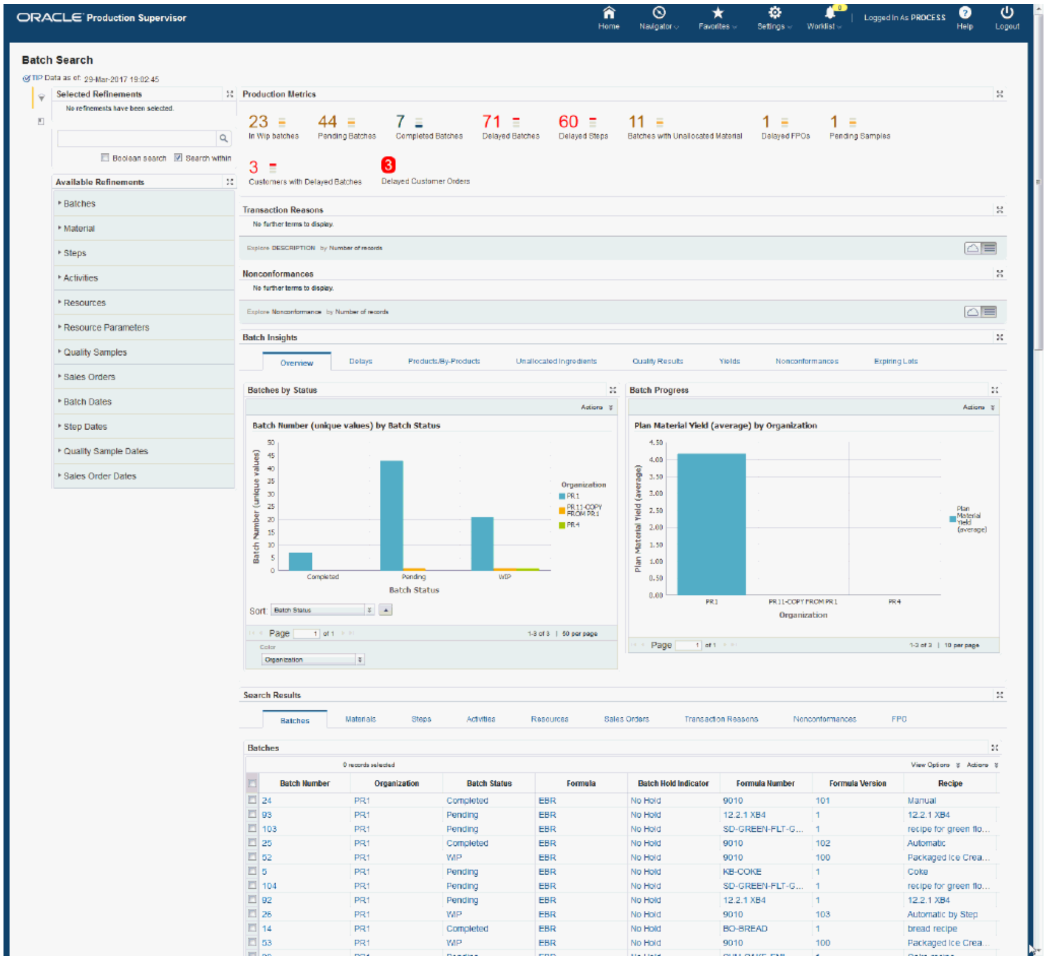
Oracle Process Manufacturing Information Discovery Plus User Interface

Batch Search Page

The Batch Search page displays Endeca content for Oracle Process Manufacturing batch processes. You can search using Available Refinements attributes, and view production metrics, charts, and results tables. The following is a partial display of the Batch Search page.

From the Production Supervisor responsibility, navigate to the Batch Search page:

(N) Production Supervisor > Batch Information Discovery



Within Endeca regions on the Batch Search page, you can track process batch activity. You can analyze data and review process batch production metrics, charts, graphs, and tables. The following describes the Endeca Batch Search page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • CUSTOMER_NAME • DESCRIPTION • FORMULA_NO • HOLD_COMMENTS • ITEM • ITEM_DESCRIPTION • NONCONFORMANCE_DESC • RECIPE_DESCRIPTION • RECIPE_NO • ROUTING_DESCRIPTION • ROUTING_NO

Region	Components
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Batches • Material • Steps • Activities • Resources • Resource Parameters • Quality Samples • Expiring Lots • Sales Orders • Batch Dates • Step Dates • Activity Dates • Resource Dates • Quality Sample Dates • Sales Order Dates • Batch Information (Descriptive Flexfield Attribute) • Detail Information (Descriptive Flexfield Attribute) • Batch Steps Information (Descriptive Flexfield Attribute)

Region	Components
	• Batch Steps Activity Information (Descriptive Flexfield Attribute) • Batch Steps Resource Information (Descriptive Flexfield Attribute)

Region	Components
Production Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning - Gray: Normal - Green: Good	• **In WIP Batches** Count of all batches with 'Released' status. • **Pending Batches** Count of all batches with 'Pending' status. • **Completed Batches** Count of all batches with 'Complete' status. • **Delayed Batches** Count of batches where 'Actual Completed Date' is later than 'Planned Completion Date', or the 'Planned Start Date' is past and the batch has not started. • **Delayed Steps** Count of Batch Steps that are delayed. • **Batches with Unallocated Material** Count of batches with Unallocated Ingredients. • **Delayed FPOs** Count of delayed Firm Planned Orders. • **Non-conformances** Count of open Non-conformances. • **Pending Samples** Count of sample results in 'Pending' status. • **Yield (percent)** Average yield percent of completed batches. • **Customers with Delayed Batches** Count of customers with delayed batches

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td></td><td>Cancelled Batches

Count of the cancelled batches in the period driven by the profile option GME: Days for Endeca cancelled batches load.
Delayed Customer Orders

Count of delayed customer orders
On Hold

Count of on hold batch alerts
Batches on Hold

Count of total batches on hold</td></tr>
<tr><td>Transaction Reasons (tag cloud)</td><td>Top Ten Transaction Reasons Tag Cloud Component

Note: The Transaction Reasons tag cloud component displays the top ten transaction reasons by frequency of occurrence.</td></tr>
<tr><td>Non-conformances (tag cloud)</td><td>Top Ten Non-conformances Tag Cloud Component

Note: The Non-conformances tag cloud component displays the top ten non-conformances by frequency of occurrence.</td></tr>
<tr><td>Batch Insights (tabbed component container)

Overview (tab)</td><td>Batches by Status (chart)
Series Dimensions (color)
(none)
Organization
Batch Progress (chart)</td></tr>
</table>

Region	Components

Batch Insights (tabbed component container)
 	
Delays (tab)
	Delayed Batches (chart)
	• Sort Options
	  • Batch Delay
	  • Batch Delay by Batch Number (count distinct)
	• Series Dimensions (color)
	  • (none)
	  • Organization
	  • Customer
	
	Delayed Steps (chart)
	• Sort Options
	  • Step Delay
	  • Step Delay by Step Number (count distinct)
	• Series Dimensions (color)
	  • (none)
	  • Organization

Region	Components

Batch Insights (tabbed component container)
 	
Products/By-Products (tab)
	Products (chart)
	• Sort Options
	  • Product
	  • Product by Batch Number (count distinct)
	• Series Dimensions (color)
	  • (none)
	  • Organization
	  • Customer
	
	By-Products (chart)
	• Sort Options
	  • By-Product
	  • By-Product by Batch Number (count distinct)
	• Series Dimensions (color)
	  • (none)
	  • Organization
	  • Customer

Region	Components

Batch Insights (tabbed component container)
 	
Unallocated Ingredients (tab)
	Batches by Unallocated Ingredients (chart)
	• Sort Options
	  • Ingredient
	  • Ingredient by Batch Number (count distinct)
	• Series Dimensions (color)
	  • (none)
	  • Organization
	
	Products by Unallocated Ingredients (chart)
	• Sort Options
	  • Product
	  • Product by Batch Number (count distinct)
	• Series Dimensions
	  • (none)
	  • Organization

Region	Components

Batch Insights (tabbed component container)
 	
Quality Results (tab)
	Sample Results (chart)
	• Sort Options
	    • Disposition
	    • Disposition by Sample Number (count distinct)
	• Series Dimensions (color)
	    • (none)
	    • Organization
	
	Sample Results Details (cross tab)

Batch Insights (tabbed component container)
 	
Yields (tab)
	Yield Percent By Organization, Product (chart)
	• Sort Options
	    • Organization
	    • Organization by WIP Plan Material Yield (average)
	• Dimensions (value axis)
	    • Actual to WIP Plan Yield
	    • Actual to Plan Yield
	• Group Dimensions (category axis)
	    • Organization
	    • Customer
	
	Product Yield Details (cross tab)

Region	Components

Batch Insights (tabbed component container)
Nonconformances (tab)
	Non Conformances by Organization (chart)
	• Sort Options
	  • Batch Number
	  • Batch Number by Nonconformance Number (count distinct)
	• Series Dimensions (color)
	  • (none)
	  • Organization
	Non Conformances by Product, Customer (chart)
	• Sort Options
	  • Item
	  • Item by Nonconformance Number (count distinct)
	• Series Dimensions (color)
	  • (none)
	  • Organization
	  • Customer

Batch Insights (tabbed component container)
Expiring Lots (tab)
	Expiring Lots by Organization (chart)
	• Sort Options
	  • Expiring Lot Number
	  • Expiring Lot Number by Expiring Lot Number (count)
	Expiring Lots Details (cross tab)

Region	Components
Search Results (tabbed component container)	The Search Results displays the following results tables: • Batches Links: • View Quality Results - select this link to navigate to the Quality Information Discovery page • Materials Links: • View Item Details - select this link to navigate to the Item Master Search page • View Quality Results - select this link to navigate to the Quality Information Discovery page • Steps • Activities • Resources • Sales Orders • Transaction Reasons • Nonconformances • FPO

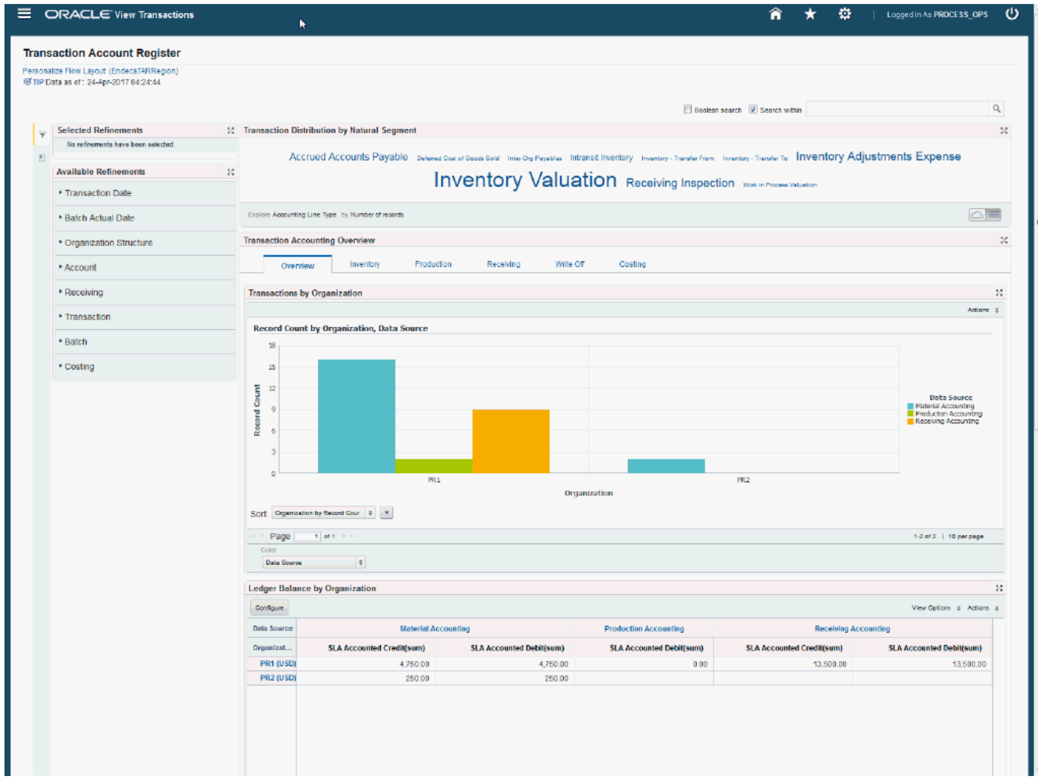
Transaction Accounting Register Page

The Transaction Accounting Register page displays material, production, receiving, write-off, and costing transaction accounting information along with SLA and GL accounting (if transferred to GL in detail mode). Using the Available Refinements component, you can search on various attributes and view Transaction Distributions Overview charts, graphs and Subledger results tables. The following is a display of the

Transaction Accounting Register page.

From the OPM Financials responsibility, navigate to the Transaction Accounting Register page:

(N) OPM Financials > View Transactions > Transaction Accounting Register



You can use the Transaction Accounting Register page to view charts, graphs, and tag clouds for insights into Transaction Accounting Distributions. The following describes the Endeca Cost Management Transaction Accounting Register page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Transaction Date • Batch Actual Date • Organization Structure • Account • Receiving • Transaction • Batch • Costing
Transaction Distribution by Natural Segment (tag cloud)	Top Ten Transaction Distribution by Natural Segment Tag Cloud Component **Note:** The Transaction Distributions by Natural Segment tag cloud component displays the top ten Natural Segment Accounts based on the accounting distributions displayed in relative sizes by frequency of occurrence.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Transactions Accounting Overview (tabbed component container)

Overview (tab)</td><td>Transactions by Organization (chart)

Note: The Overview - Transaction by Organization chart displays distributions of the number of transactions by Organizations stacked by Source Type of the transactions.
Sort Options
Organization
Organization by Record Count
Series Dimensions (color)
(none)
Data Source
Ledger Balance by Organization (cross tab)

Note: The Overview - Ledger Balance by Organization cross tab displays ledger balances for all Organizations.
View Options
Conditional Formatting
Summaries
Grand Summary
Actions
Export to Microsoft Excel
Print</td></tr>
</table>

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Inventory (tab)
	Transaction Value by Organization (chart)
	• Sort Options
	  • Organization
	  • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	  • (none)
	  • Accounting Line Type
	
	Inventory Subledger (cross tab)
	• Column Sets
	  • Transaction Details
	  • Organization Attributes
	  • SLA Accoubting
	  • GL Journals
	  • SLA and GL Accounting
	  • Inventory Attributes
	  • Manufacturing Attributes
	  • Purchasing Attributes
	• View Options
	  • Conditional formatting
	  • Hide / Show Columns
	  • Sort

Region	Components
	- Reset table to default • Actions - Print - Export to Microsoft Excel

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Production (tab)
	Transaction Value by Organization (chart)
	• Sort Options
	  • Organization
	  • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	  • (none)
	  • Accounting Line Type
	
	Production Subledger (cross tab)
	• Column Sets
	  • Production Attributes
	  • Purchasing Attributes
	  • Transaction Details
	  • Organization Attributes
	  • SLA Accounting
	  • GL Journals
	  • SLA and GL Accounting
	• View Options
	  • Conditional formatting
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default

Region	Components

	• Actions
	  • Print
	  • Export to Microsoft Excel

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Receiving (tab)
	Transaction Value by Organization (chart)
	
	• Sort Options
	    • Organization
	    • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	    • (none)
	    • Accounting Line Type
	
	Receiving Subledger (cross tab)
	
	• Column Sets
	    • Receiving Attributes
	    • Purchasing Attributes
	    • Production Attributes
	    • Transaction Details
	    • Organization Attributes
	    • SLA Accounting
	    • GL Journals
	    • SL and GL Accounting
	• View Options
	    • Conditional formatting
	    • Hide / Show Columns
	    • Sort

Region	Components
	- Reset table to default • Actions - Print - Export to Microsoft Excel

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Write Off (tab)
	Transaction Value by Organization (chart)
	• Sort Options
	    • Organization
	    • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	    • (none)
	    • Accounting Line Type
	
	Receiving Subledger (cross tab)
	• Column Sets
	    • Write Off Attributes
	    • Invoice Attributes
	    • Receiving Attributes
	    • Inventory Attributes
	    • Transaction Details
	    • Organization Attributes
	    • SLA Accounting
	    • GL Journals
	    • SLA and GL Accounting
	• View Options
	    • Hide / Show Columns
	    • Sort

Region	Components
	- Reset table to default • Actions - Print - Export to Microsoft Excel

Region	Components

Transactions Accounting Overview (tabbed component container)
 	
Costing (tab)
	Transaction Value by Organization (chart)
	• Sort Options
	  • Organization
	  • Organization by Base Transaction Value (sum)
	• Series Dimensions (color)
	  • (none)
	  • Accounting Line Type
	
	Costing Subledger (cross tab)
	• Column Sets
	  • Costing Attributes
	  • Transaction Details
	  • Organization Attributes
	  • SLA Accounting
	  • GL Journals
	  • SLA and GL Accounting
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print

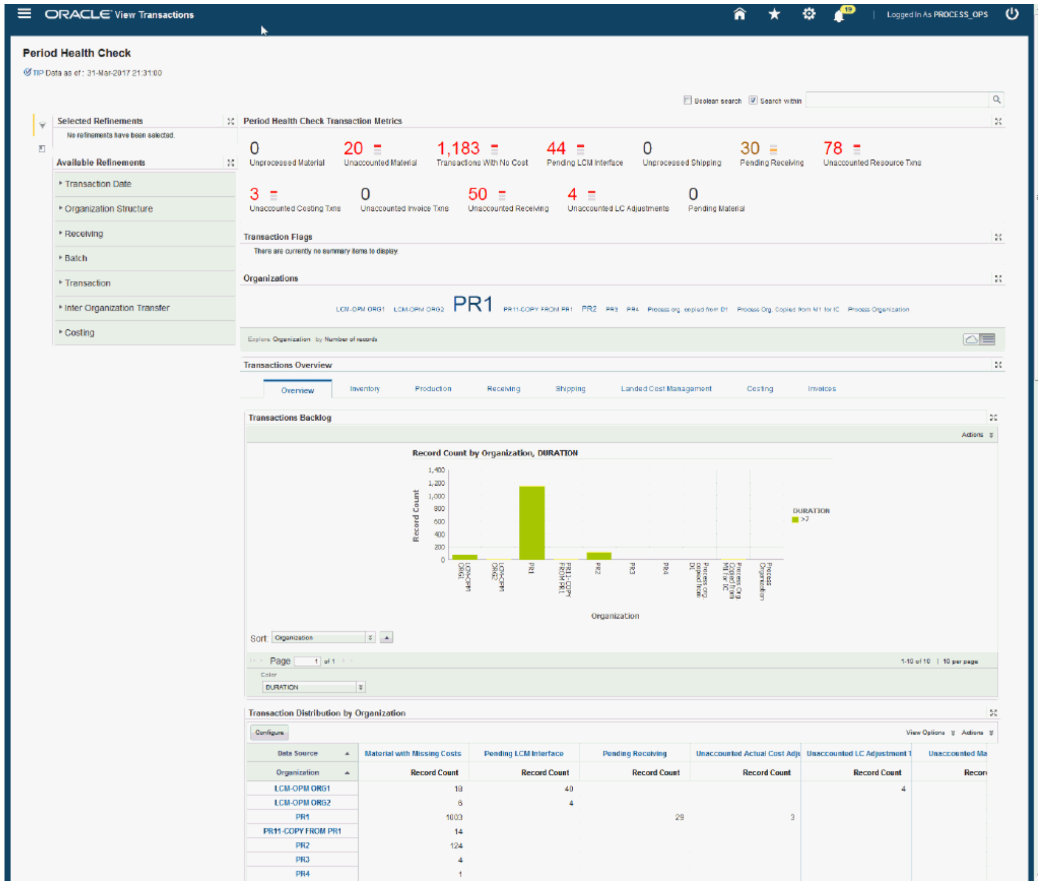
Region	Components
	• Export to Microsoft Excel

Period Health Check Page

Use the Period Health Check page to search for and display Inventory, Production, Receiving, Shipping, Landed Cost Management, Costing, and Invoices transactions that are preventing period close, as well as transactions that are to be reviewed and preferably processed but are not necessary for period close. You can use the Available Refinements component to search on various attributes and view period close metrics, charts, and results tables. The following is a partial display of the Period Health Check page.

From the OPM Financials responsibility, navigate to the Period Health Check page:

(N) OPM Financials > View Transactions > Period Health Check



You can use the Period Health Check page to view transactions that could prevent or delay period close. You can analyze data and review transaction metrics, charts, graphs, and tables. The following describes the Endeca Cost Management Period Health Check page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Transaction Date • Organization Structure • Receiving • Batch • Transaction • Inter Organization Transfer • Costing
Period Health Check Transaction Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning state - Gray: Normal - Green: Good	• Unprocessed Material • Unaccounted Material • Transactions With No Cost • Pending LCM Interface • Unprocessed Shipping • Pending Receiving • Unaccounted Resource Txns • Unaccounted Costing Txns • Unaccounted Invoice Txns • Unaccounted Receiving • Unaccounted LC Adjustment Transactions • Pending Material

Region	Components
Organizations (tag cloud)	Top Ten Organizations Tag Cloud Component **Note:** The Organizations tag cloud component displays the top ten organizations having the most transactions displayed in relative sizes by frequency of occurrence.

Region	Components

Transactions Overview (tabbed component container)
 	
Overview (tab)
	Transactions Backlog (chart)
	• Sort Options
	  • Organization
	  • Organization by Record Count
	• Series Dimensions (color)
	  • (none)
	  • Duration
	
	Transaction Distribution by Organization (cross tab)
	
	Note: The Overview - Transactions Distribution by Organization cross tab displays the transaction counts grouped by Functional Group and Organization.
	
	• View Options
	  • Conditional Formatting
	  • Summaries
	  • Grand Summary
	• Actions
	  • Export to Microsoft Excel
	  • Print

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Transactions Overview (tabbed component container)

The tabbed container includes tabs for each of the following transaction sources:

• Inventory (tab)
• Production (tab)
• Receiving (tab)
• Shipping (tab)
• Landed Cost Management (tab)
• Costing (tab)
• Invoices (tab)</td><td>Transaction Distribution by Organization (chart)

Note: The Transaction Distribution by Organization chart displays the transaction counts grouped by Transaction Source and Organization.

• Sort Options
    • Organization
    • Organization by Record Count
• Series Dimensions (color)
    • (none)
    • Data Source

Transaction Distribution by Organization (cross tab)

Note: The Transaction Distribution by Organization cross tab displays the counts of transactions grouped by Source Type and Organization.

Transaction Details (results table)

Note: The Transaction Details results table displays all attributes pertaining to the transactions and are grouped into column sets. Each column set contains a subset of logically related and relevant columns. Therefore, there is no need for long scrolls to view all the transaction details.

• Column Sets
    • Inventory Attributes</td></tr>
</table>

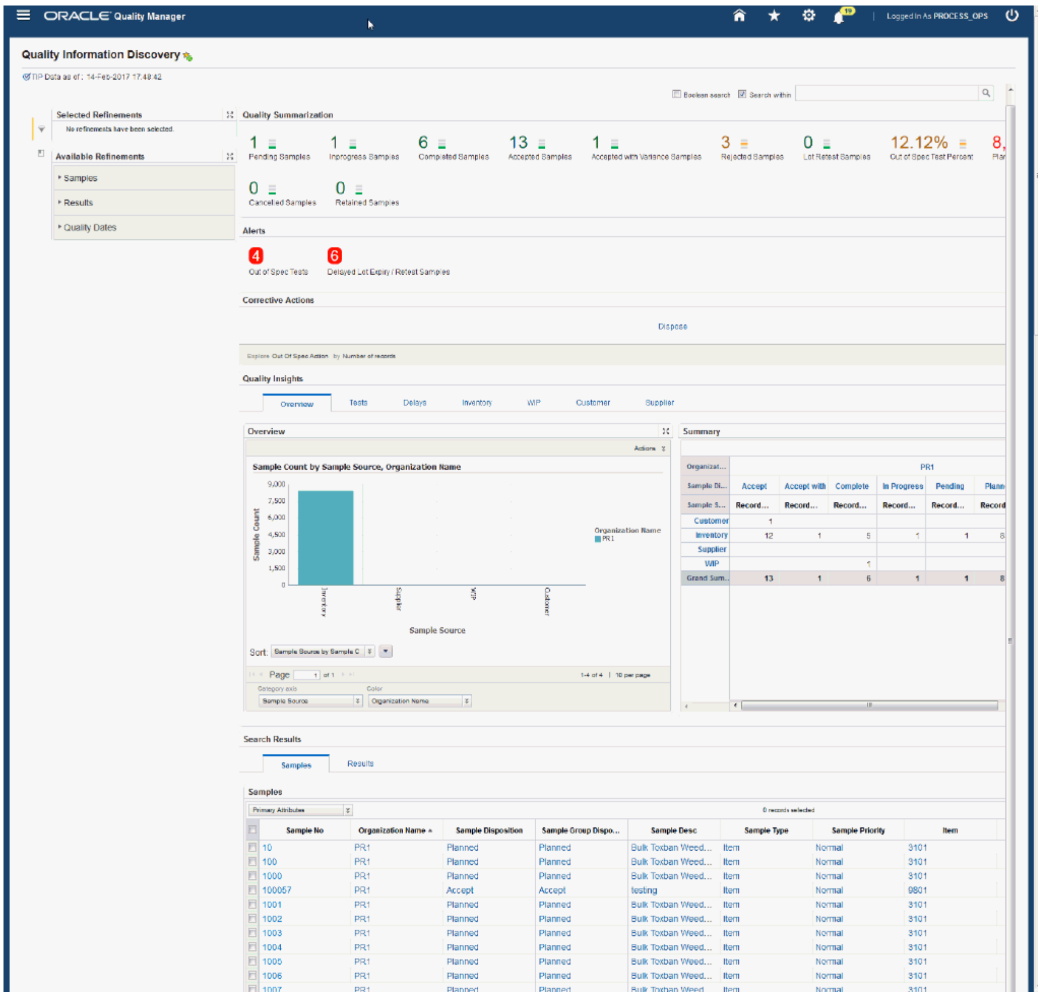
Region	Components
	- Transaction Details - Organization Structure - General Source Attributes - Transaction Status - Intransit Attributes - Cost and Accounting Attributes - Project Attributes - Sales Order Attributes - Work Order Attributes - Receiving Attributes - Logical Transaction Attributes - View Options - Conditional formatting - Hide / Show columns - Sort - Reset table to default - Actions - Print - Export to Microsoft Excel

Quality Information Discovery Page

Use the Quality Information Discovery page to search for and display information related to the quality of the material and processes, identify material non conformances, and take corrective actions. You can use the Available Refinements component to search on various attributes and view quality metrics, charts, and results tables. The following is a partial display of the Quality Information Discovery page.

From the OPM Quality Manager responsibility, navigate to the Quality Information Discovery page:

(N) Quality Manager > Quality Information Discovery



You can use the Quality Information Discovery page to search and view process quality samples, test results, and related entities across inventory and laboratory organizations. You can analyze data and review quality metrics, charts, graphs, and tables. The following describes the Endeca Quality Information Discovery page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	You can use the Available Refinements component to filter data using attribute groups. Expand the following attribute groups to view and select attribute names: • Samples • Results • Quality Dates • Samples Additional Information • Results Additional Information

Region	Components
Quality Summarization (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health: - Red: Critical warning state - Yellow: Warning - Gray: Normal - Green: Good	• **Accepted Samples** Distinct count of all samples with disposition status 'Accept' • **Pending Samples** Distinct count of all samples with disposition status 'Pending' • **Completed Samples** Distinct count of all samples with disposition status 'Complete' • **Lot Expiry / Retest Samples** Distinct count of all samples with disposition status either 'Pending' or 'In Progress', and the Lot Expiry/Retest is indicated on the sample • **Accepted With Variance** Distinct count of all samples with disposition status 'Accepted with Variance' • **In Progress Samples** Distinct count of all the samples with disposition status 'In Progress' • **Rejected Samples** Distinct count of all samples with disposition status 'Reject' • **Delayed Samples** Count of all the test samples which are delayed (actual sample date > planned sample date) • **Delayed Results** Count of all the test results which are

Region	Components
	delayed (actual result date > planned result date). This includes the test results of all the samples where the disposition is not 'Accepted, Accepted with Variance or Reject or Cancel' • **Tests Out of Spec** Percentage of tests out of specification out of all the tests evaluated (Evaluation is not null) • **Items With Active Samples** Count of distinct items with the active samples (Samples with the disposition 'Pending', 'In Progress', 'Completed')
Alerts	The Quality Information Alerts region displays a list of the quality alerts for • Delayed Samples • Delayed Results • Out of Specification Test Results • Expiring Samples • Delayed Lot Expiry/Retest Samples
Corrective Actions (tag cloud)	Top Ten Corrective Actions Tag Cloud Component **Note:** The Corrective Actions tag cloud component displays the top ten corrective actions entered in tests that are evaluated as Out of Specification and are displayed in relative sizes by frequency of occurrence.

Region	Components

Quality Insights (tabbed component container)
 	
Overview (tab)
	Sample Count by Sample Source, Organization Name (chart)
	• Sort Options
	    • Sample Source
	    • Sample Source by Sample Count
	• Group Dimensions (category axis)
	    • Sample Source
	    • Sample Disposition
	• Series Dimensions (color)
	    • (none)
	    • Organization Name
	    • Lab Name
	    • Sample Source
	    • Sample Disposition
	    • Sample Priority
	
	Summary (cross tab)
	• View Options
	    • Summaries
	    • Grand Summary
	• Actions
	    • Export to Microsoft Excel
	    • Print

Region	Components

Quality Insights (tabbed component container)
 	
Test (tab)
	Tests Due by Tester (chart)
	• Sort Options
	  • Tester
	  • Tester by Count of Results
	• Group Dimensions (category axis)
	  • Tester
	  • Actual Resource
	  • Test Kit Item No.
	• Series Dimensions (color)
	  • (none)
	  • Lab Name
	  • Test Method
	  • Test
	
	Tests Due by Due Period (chart)
	• Sort Options
	  • Result Due Period
	  • Result Due Period by Count of Results
	• Group Dimensions (category axis)
	  • Result Due Period
	  • Test Method
	  • Test

Region	Components

	• Series Dimensions (color)
	  • (none)
	  • Lab Name
	  • Result Due Period
	  • Test Method
	  • Test

Region	Components

Quality Insights (tabbed component container)
 	
Delays (tab)
	Delayed Samples (chart)
	• Sort Options
	  • Sample Delayed Period
	  • Sample Delayed Period by Sample Count
	• Series Dimensions (color)
	  • (none)
	  • Lab Name
	  • Organization Name
	  • Sample Source
	  • Sample Disposition
	  • Sample Priority
	
	Delayed Tests (chart)
	• Sort Options
	  • Test
	  • Test by Record Count
	• Group Dimensions (category axis)
	  • Test
	  • Test Method
	  • Result Delayed Period
	• Series Dimensions (color)
	  • (none)

Region	Components
	• Result Delayed Period • Lab Name • Organization Name • Test • Test Method

Region	Components

Quality Insights (tabbed component container)
 	
Inventory (tab)
	Disposition Analysis (chart)
	• Sort Options
	    • Item
	    • Item by Count of Active Samples
	• Dimensions (value axis)
	    • Count of Active Samples
	    • Count of Accepted Samples
	    • Count of Accepted with Variance Samples
	    • Count of Rejected Samples
	• Group Dimensions (category axis)
	    • Item
	    • Subinventory
	    • Locator
	• Series Dimensions (color)
	    • (none)
	    • Organization Name
	    • Lab Name
	    • Sample Priority
	    • Sample Disposition
	
	Out of Spec Test Analysis (chart)
	• Sort Options

Region	Components
	- Test Method - Test Method by Count of Out of Spec Test - Test Method by Percentage of Out of Spec Test • Group Dimensions (category axis) - Test Method - Test

Region	Components

Quality Insights (tabbed component container)
 	
WIP (tab)
	Disposition Analysis (chart)
	• Sort Options
	    • Item
	    • Item by Count of Active Samples
	• Dimensions (value axis)
	    • Count of Active Samples
	    • Count of Accepted Samples
	    • Count of Accepted with Variance Samples
	    • Count of Rejected Samples
	• Group Dimensions (category axis)
	    • Item
	    • Recipe
	    • Formula
	    • Routing
	    • Operation
	• Series Dimensions (color)
	    • (none)
	    • Organization Name
	    • Lab Name
	    • Sample Priority
	    • Sample Disposition

Region	Components

	Out of Spec Test Analysis (chart)
	• Sort Options
	  • Test Method
	  • Test Method by Count of Out of Spec Test
	  • Test Method by Percentage of Out of Spec Test
	• Group Dimensions (category axis)
	  • Test Method
	  • Test

Region	Components

Quality Insights (tabbed component container)
 	
Customer (tab)
	Disposition Analysis (chart)
	• Sort Options
	  • Item
	  • Item by Count of Active Samples
	• Dimensions (value axis)
	  • Count of Active Samples
	  • Count of Accepted Samples
	  • Count of Accepted with Variance Samples
	  • Count of Rejected Samples
	• Group Dimensions (category axis)
	  • Item
	  • Customer
	  • Customer Location
	• Series Dimensions (color)
	  • (none)
	  • Organization Name
	  • Lab Name
	  • Sample Priority
	  • Sample Disposition
	
	Out of Spec Test Analysis (chart)
	• Sort Options

Region	Components
	- Test Method - Test Method by Count of Out of Spec Test - Test Method by Percentage of Out of Spec Test

	- Group Dimensions (category axis)
	  - Test Method
	  - Test

Region	Components

Quality Insights (tabbed component container)
 	
Supplier (tab)
	Disposition Analysis (chart)
	• Sort Options
	    • Item
	    • Item by Count of Active Samples
	• Dimensions (value axis)
	    • Count of Active Samples
	    • Count of Accepted Samples
	    • Count of Accepted with Variance Samples
	    • Count of Rejected Samples
	• Group Dimensions (category axis)
	    • Item
	    • Supplier
	    • Supplier Site
	• Series Dimensions (color)
	    • (none)
	    • Organization Name
	    • Lab Name
	    • Sample Priority
	    • Sample Disposition
	
	Out of Spec Test Analysis (chart)
	• Sort Options

Region	Components
	- Test Method - Test Method by Count of Out of Spec Test - Test Method by Percentage of Out of Spec Test - Group Dimensions (category axis) - Test Method - Test

Region	Components

Search Results (tabbed component container)
Samples (tab)
	Samples (results table)
	• Column Sets
	  • Primary Attributes
	  • Inventory Attributes
	  • WIP Attributes
	  • Customer Attributes
	  • Supplier Attributes
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset Table to Default
	• Actions
	  • Print
	  • Export to Microsoft Excel
	  • Click the Sample No. link to go to the View Sample Details window for each record selected.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Search Results (tabbed component container)

Results (tab)</td><td>Results (results table)
View Options
Hide / Show Columns
Sort
Reset Table to Default
Actions
Print
Export to Microsoft Excel
Click the Sample No. link to go to the View Sample Details window for each record selected.</td></tr>
</table>

Oracle Process Manufacturing Information Discovery Plus Product Configuration

Setting Up Oracle Process Manufacturing Information Discovery Plus

The Oracle Process Manufacturing application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Process Manufacturing Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 26-57 by assigning UMX roles and updating access grants.
2. Schedule Setup for Full Endeca Refresh, page 26-58.
3. Set Profile Options, page 26-59.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Process Manufacturing

As part of the Oracle E-Business Suite-EID integration for the Oracle Process Manufacturing application, the following UMX Roles are provided:

UMX Role	Internal Code Name
GMO Endeca Access Role	UMX|GMO_ENDECA_ACCESS_ROLE
OPM Financials Endeca Transaction Accounting Register Access Role	UMX|GMF_ENDECA_TXN_REG_ACCESS_ROLE
OPM Financials Endeca Period Health Check Access Role	UMX|GMF ENDECA PRD HLTH CHK ACCESS ROLE
GMD Quality Endeca Access Role	UMX|GMD_QUALITY_ENDECA_ACCESS_ROLE

You must add the UMX roles to enable Endeca menus for the Production Supervisor, OPM Financials, and OPM Quality Manager responsibilities (or any other custom responsibility which is using the same menu). You must assign these UMX roles to the responsibilities. When the UMX roles are assigned to the responsibilities, the pages appear.

If you want to use the Endeca-related roles with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process instead of while you are adding the role to the responsibility.

Permission Set	Internal Code Name
GMD Quality Endeca Access Permission Set	GMD_QUALITY_ENDECA_ACCESS_PS

Access Grant	Internal Code Name
GMD Quality Endeca Access Grant	GMD_QUALITY_ENDECA_ACCESS_GRANT

Complete the following steps to enable Endeca Menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.
2. Update GMD_QUALITY_ENDECA_ACCESS_GRANT Grant.

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setting Up the Scheduler for Endeca Full Refresh

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.

4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select the graph for schedule to run. I.e. Full.grf/incremental.grf.
13. Click Create to set the scheduler.

Profile Options for Oracle Process Manufacturing

Profile Option Name	Description
GMD:Days For Full Data Load	This optional site-level profile determines the number of days for loading quality data. Records updated within the days set by this profile option are loaded. The default setting is 180 days and overrides the Endeca Workspace parameter setting defined by the user.
GME: Days For Endeca Cancelled Batches Load	This optional site-level profile sets the maximum days for gmo-batch Endeca full data load for cancelled batches.

Views and Joins for Oracle Process Manufacturing

The following views are used by the ETL layer in Endeca to load Process Manufacturing data to the Endeca data domain:

View Name	Purpose
GMD_ENDECA_CUS_QUALITIES_V	This view loads customer sample and results for display in the Quality Information Discovery Page.
GMD_ENDECA_INV_QUALITIES_V	This view loads inventory samples and results for display in the Quality Information Discovery Page.
GMD_ENDECA_SUP_QUALITIES_V	This view loads supplier samples and results for display in the Quality Information Discovery Page.
GMD_ENDECA_WIP_QUALITIES_V	This view loads WIP samples and results for display in the Quality Information Discovery Page.
GMD_ENDECA_QM_TMP	Incremental load uses a temp table to gather samples and results created and modified from the last successful full/incremental load.
OPM_ENDECA_HDR_V	This view loads batch header information for display in the Batch Information Discovery Page.
OPM_ENDECA_MTL_V	This view loads material data pertaining to the batch for display in the Batch Information Discovery Page.
OPM_ENDECA_STEP_V	This view loads batch step information for display in the Batch Information Discovery Page.
OPM_ENDECA_ACTIVITY_V	This view loads batch step activity information for display in the Batch Information Discovery Page.
OPM_ENDECA_RESOURCE_V	This view loads batch step resource information for display in the Batch Information Discovery Page.
OPM_ENDECA_PP_V	This view loads batch step resource parameter information for display in the Batch Information Discovery Page.

View Name	Purpose
OPM_ENDECA_SO_RESER_V	This view loads sales order reservation information pertaining to the batch for display in the Batch Information Discovery Page.
OPM_ENDECA_TXN_REASON_V	This view loads transaction reason information pertaining to the batch for display in the Batch Information Discovery Page.
OPM_ENDECA_EXPIRED_LOT_V	This view loads expired lot information pertaining to the batch for display in the Batch Information Discovery Page.
OPM_ENDECA_SAMPLE_V	This view loads OPM Quality sample information pertaining to the batch for display in the Batch Information Discovery Page.
OPM_ENDECA_NCM_V	This view loads non conformance data pertaining to the batch for display in the Batch Information Discovery Page.

Menus for Oracle Process Manufacturing

Endeca Process Manufacturing integration includes the following user menu functions:

User Function Name	Function Name
View Transactions	GMF_VIEW_TRANSACTIONS
Quality Information Discovery	GMD_QUALITY_ENDECA_SEARCH_PAGE

27

Oracle Quality Information Discovery Plus

Overview

You can use Oracle Quality Information Discovery Plus to search and filter the most collections data in a single location and drill down to get more detailed information enabling you to take action using that information. As a Product & Process Quality Engineer or an Analyst, you can use the Quality Collection Results, Nonconformance Collection Results, and Corrective Actions Collection Results pages to perform searches across quality plans and plan types, across quality plan hierarchies for quality and nonconfirmance enabling you to take early corrective actions. You use these pages, based on your role, to review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables.

You can search using Oracle Quality Information Discovery Plus pages and Endeca Information Discovery (EID) design tools. These pages are hosted in an EID environment, and called from new container pages in EBS.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Quality Information Discovery Plus for the Oracle Endeca application. This supplements the information provided in Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8 (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

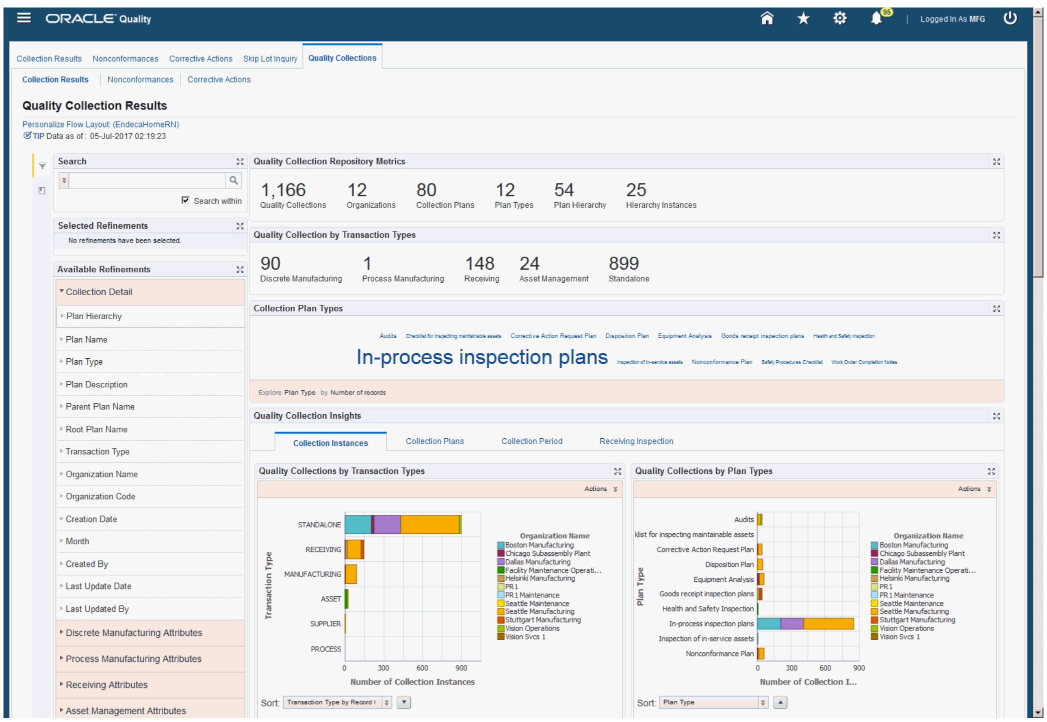
Oracle Quality Information Discovery Plus User Interfaces

Quality Collection Results

If you are a Product & Discrete Quality Engineer or an Analyst, you use the Quality Collection Results page to search for quality plans and plan types, across quality plan hierarchies for an overview and detail of all the quality collections plans and plan elements.

From the Quality Collections responsibility, navigate to the Quality Collection Results page:

- (N) Quality Collections Information Discovery > Quality Collections > Quality Collection Results



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.

Region	Components
Tip	Displays the date on which data was last refreshed.
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Quality Collection Repository Metrics

Note: The Metric Components are color coded to highlight warnings and health:
Red: Critical warning state
Yellow: Warning state
Gray: Normal
Green: Good</td><td>Consists of the following:
Quality Collections
Organizations
Collection Plans
Plan Types
Plan Hierarchy
Hierarchy Instances</td></tr>
<tr><td>Quality Collection by Transaction Types</td><td>Consists of the following:
Discrete Manufacturing
Process Manufacturing
Receiving
Asset Management
Standalone</td></tr>
<tr><td>Collection Plan Types</td><td>Displays the top 10 plan types.</td></tr>
<tr><td>Quality Collection Insights</td><td>Consists of the following tabs:
Collection Instances
Collection Plans
Collection Period
Receiving Inspection</td></tr>
</table>

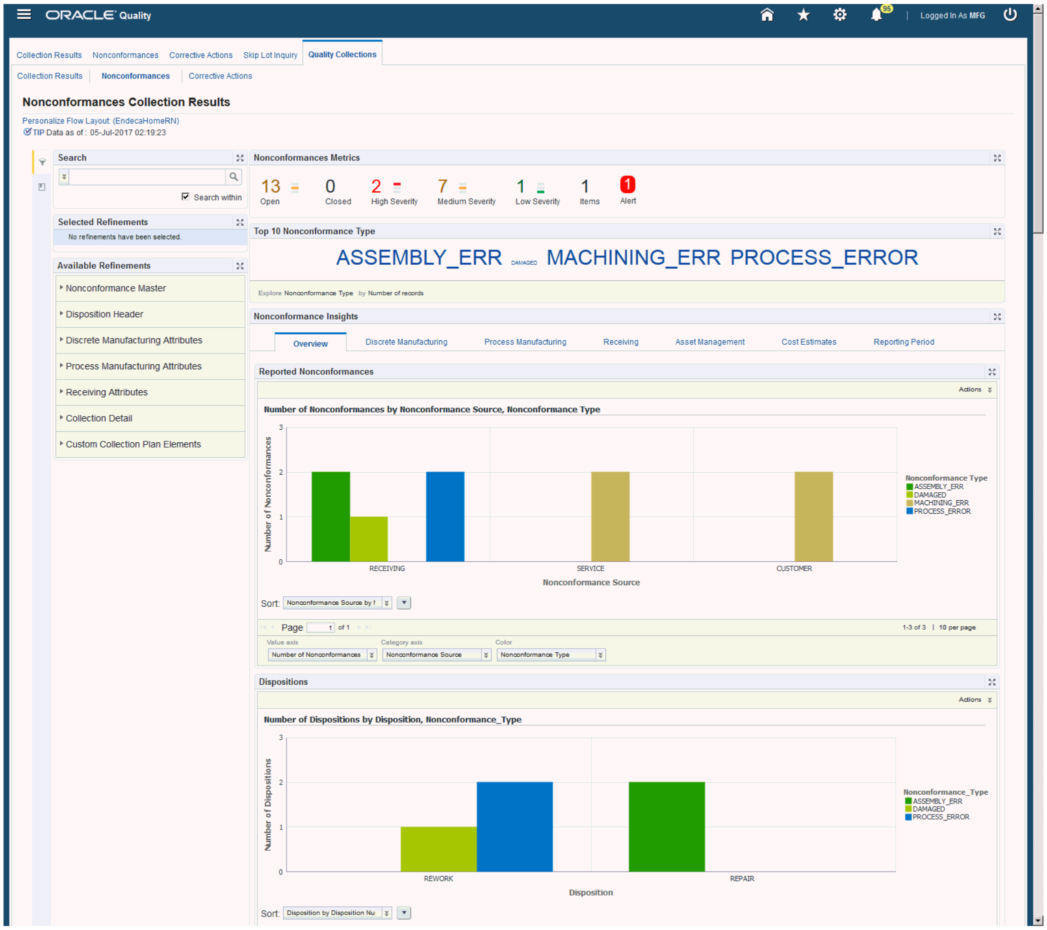
Region	Components
Quality Collections	Consists of the following tabs: • Collections • Collection Details
Compare Collections	Use this to compare two or more collections.
Collection Record Details	Use this to view details of the collections.

Nonconformances Collection Results

If you are a Product & Discrete Quality Engineer or an Analyst, you use the Nonconformances Collection Results page to get an insights into quality non-conformance and details.

From the Quality Collections Information Discovery responsibility, navigate to the Nonconformances Collection Results page:

- (N) Quality Collections > Nonconformances > Nonconformances Collection Results



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.
Tip	Displays the date on which data was last refreshed.

Region	Components
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Region	Components
Nonconformances Metrics **Note:** The Metric Components are color coded to highlight warnings and health: • Red: Critical warning state • Yellow: Warning state • Gray: Normal • Green: Good	Consists of the following: • Open • Closed • High Severity • Medium Severity • Low Severity • Items
Top 10 Nonconformance Types	Displays the top 10 Nonconformance types.
Nonconformance Insights	Consists of the following tabs: • Overview • Discrete Manufacturing • Process Manufacturing • Receiving • Asset Management • Cost Estimates • Reporting Period
Dispositions	Displays the number of dispositions by disposition type and nonconformance type in a graphical format.
Quality Collections	Consists of the following tabs: • Collections • Collection Details

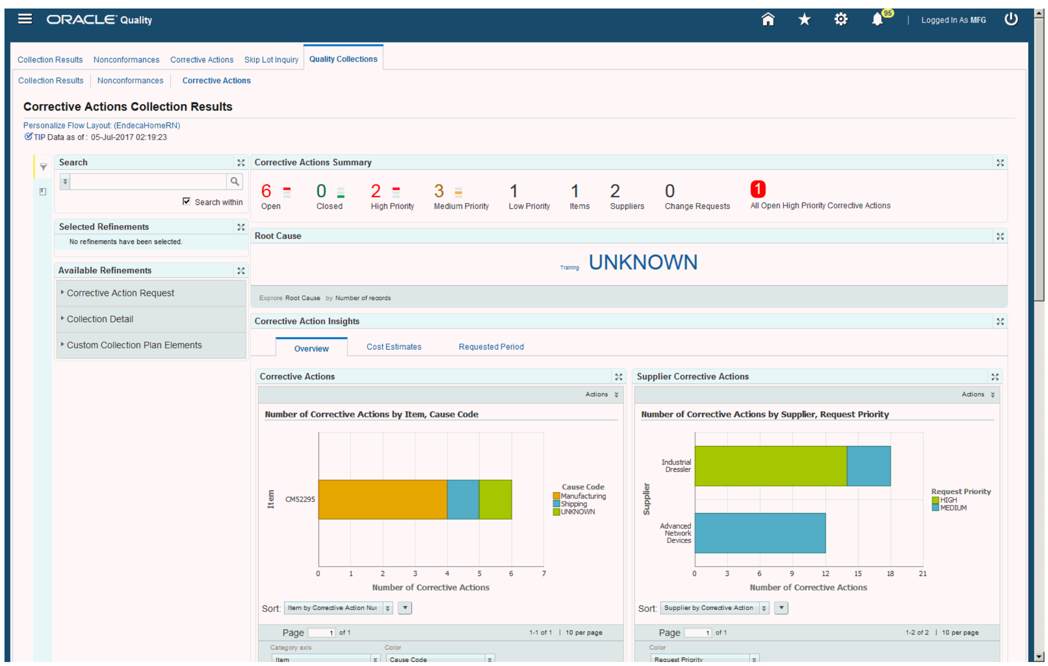
Region	Components
Compare Collections	Use this to compare two or more collections.
Collection Record Details	Use this to view details of the collections.

Corrective Actions Collection Results

If you are a Product & Process Quality Engineer or an Analyst, you use the Corrective Actions Collection Results page to analyze and search past corrective actions.

From the Quality Collections Information Discovery responsibility, navigate to the Corrective Actions Collection Results page:

- (N) Quality Collections > Corrective Actions > Corrective Actions Collection Results



Region	Components
Alerts	Use alerts to direct you attention to any potential issues or risks that might arise.

Region	Components
Tip	Displays the date on which data was last refreshed.
Search • Search Within	The Advanced Search component includes value search, record search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the attribute groups to view and select attribute names.

Region	Components
Corrective Actions Metrics **Note:** The Metric Components are color coded to highlight warnings and health: • Red: Critical warning state • Yellow: Warning state • Gray: Normal • Green: Good	Consists of the following: • Open • Closed • High Priority • Medium Priority • Low Priority • Items • Suppliers • Change Requests
Root Cause	Displays the top 10 root causes for corrective actions.
Corrective Action Insights	Consists of the following tabs: • Overview • Cost Estimates • Requested Period
Quality Collections	Consists of the following tabs: • Collections • Collection Details
Compare Collections	Use this to compare two or more collections.
Collection Record Details	Use this to view details of the collections.

Oracle Quality Information Discovery Plus Product Configuration

Overview

Complete the Oracle Quality Information Discovery Plus product configuration after the installation and common configurations are completed as described in the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1).

Setting Up Oracle Quality Information Discovery Plus Integration

1. Add the UMX|QA ENDECA ACCESS ROLE to any predefined Oracle Quality responsibility or to any custom Oracle Quality responsibility.

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

2. Change plan names as well element names which start with number.

   The SQL script for getting all the plan names which start with number is:

   ```
   SELECT *
   FROM qa_plans
   WHERE name LIKE '1%'
   OR name LIKE '2%'
   OR name LIKE '3%'
   OR name LIKE '4%'
   OR name LIKE '5%'
   OR name LIKE '6%'
   OR name LIKE '7%'
   OR name LIKE '8%'
   OR name LIKE '9%'
   OR name LIKE '0%';
   ```

   The SQL script for getting all the plan elements which start with number is:

   ```
   SELECT *
   FROM qa_chars
   WHERE name LIKE '1%'
   OR name LIKE '2%'
   OR name LIKE '3%'
   OR name LIKE '4%'
   OR name LIKE '5%'
   OR name LIKE '6%'
   OR name LIKE '7%'
   OR name LIKE '8%'
   OR name LIKE '9%'
   OR name LIKE '0%' ;
   ```

3. Run qltvcreb.plb on the environment to re create all the collection plan views.

4. Run the Publish Quality Collection Metadata to Endeca Information Discovery concurrent program to publish EBS data to Endeca.

   Note: The total number of unique collection elements across all the published collection plans should not exceed 900.

   See: Publishing Quality Collection Metadata to Endeca Information Discovery, page 27-13

5. Run the Full Load graph.

   See: Running the Full Load Graph, page 27-14

6. Set up the Scheduler.

   See: Setting Up the Scheduler to Load Incremental Graphs, page 27-14

Publishing Quality Collection Metadata to Endeca Information Discovery

You run the Publish Quality Collection Metadata to Endeca Information Discovery concurrent program to publish EBS data to Endeca. You run the program from the Submit Requests window.

To publish quality collection metadata to endeca information discovery:

1. Choose Single Request and click OK.

2. Select Publish Quality Collection Metadata to Endeca Information Discovery as the Request Name.

3. In the Parameters window, enter the following information:

   - Plans List

   - Create Plan Attribute Groups

   - Create Plan Hierarchy Attribute Group

   - Publish/Reset Plan

   - From Date

4. Choose OK.

5. Choose Submit Request. Use the Concurrent Requests Summary window to verify that the concurrent program completed successfully.

Running the Full Load Graph

Once you have run the full load graph in accordance with the Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8 document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. Additionally, you need to run the following full data loads as follows:

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Quality Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select qa-quality from the Sandbox list.
13. Select graph/FullLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler to Load Incremental Graphs

Once you have run the full load graph in accordance with the Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8 document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the volume of information requiring update.

To set up the schedule:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Quality Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select qa-quality from the Sandbox list.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

ETL Parameters for Oracle Quality Information Discovery Plus

You can load data to the qa data store by running the graphs provided by Quality Information Discovery.

To load data to the qa data store:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node. The Quality Information Discovery sandbox is qa.
2. Graphs to load data include:
   - **FullLoadConfig.grf** - This graph is executed only once for the first time when Quality Endeca is set up This graph would further call FullLoad.grf from

common api which Inserts Audit Record, Init Datastore, Reset Datastore, Loads the FND config from the Endeca FND tables for Attributes and Groups etc.

- **LoadDataFull.grf** - This graph calls the LoadTaxonomy1.grf, loads collection data for the plans published and LoadViewDefinitions.grf is called to load the views at studio.

- **LoadTaxonomy1.grf** - This graph loads the taxonomy data by querying the QA_ENDECA_TAX_TAB table.

- **LoadViewDefinitions.grf** - This graph loads EQL view definitions to the studio.

- **IncrementalLoadConfig.grf** - This graph is executed for all subsequent data loads except the first time. IncrDataSetup processes all the metadata and collection data that need to be published and IncrementalLoad.grf loads this attribute metadata.

- **LoadDataIncr.grf** - This graph calls the LoadTaxonomyForIncrLoad.grf to update the plan hierarchy data, loads collection data for the plans published along with respective attribute metadata.

- **LoadTaxonomyForIncrLoad.grf** - This graph loads the delta Taxonomy data from the previous run.

Views and Joins in Oracle Quality Information Discovery Plus

The following views are used by the ETL layer in Oracle Endeca to load and display Oracle Quality Information Discovery Plus data to the Oracle Endeca data store:

- QA_RESULTS_ENDEA_V - this view is used by Endeca layer to query Quality data.

28

Oracle Quoting Information Discovery Plus

This chapter covers the following topics:

- Overview
- Quote Performance Page
- Manage Quotes Page
- Overview
- Setting Up Oracle Quoting Information Discovery Plus
- Setting Up Profile Options
- Running the Full Load Graph
- Setting Up the Scheduler for Incremental Refresh
- Roles in Oracle Quoting Information Discovery Plus
- Menus and Functions in Oracle Quoting Information Discovery Plus
- Views and Joins in Oracle Quoting Information Discovery Plus

Overview

Oracle Quoting Information Discovery Plus enables you to view open quotes, successful quotes and quotes in other statuses between them.

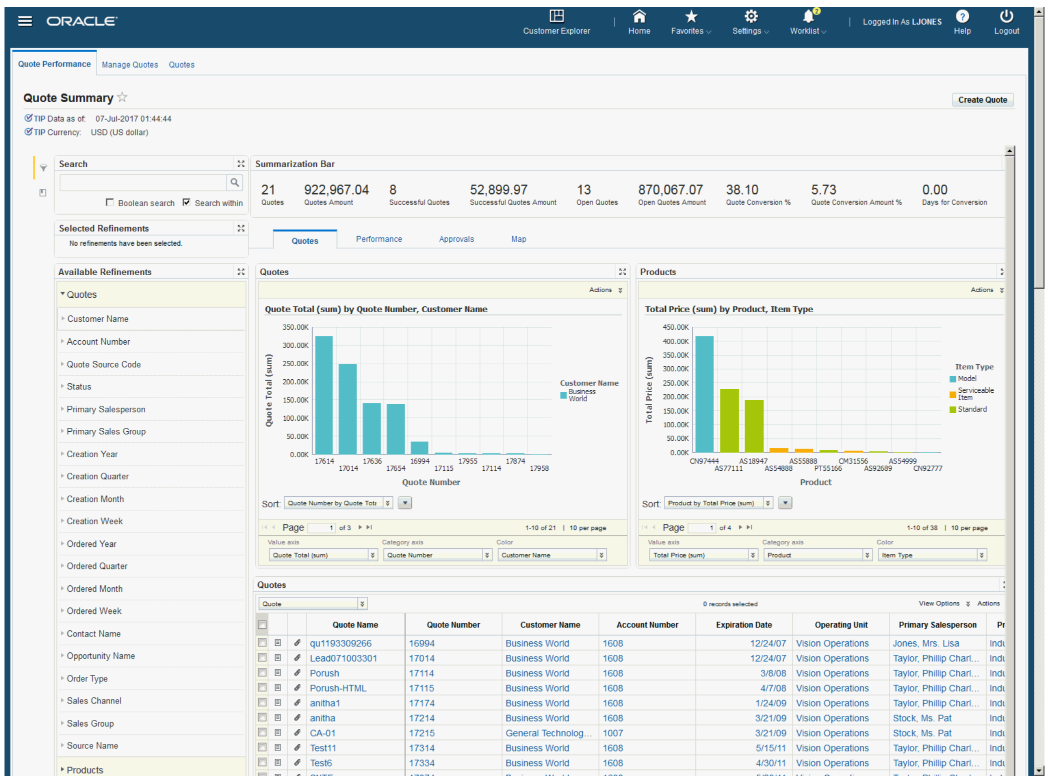
Oracle Quoting Information Discovery Plus allows quoting users to view open quotes, successful quotes and quotes in other statuses between them. The user can perform several quote actions without having to open the quote. The quote actions are quote versioning, duplicate quote, view sales commission, print quote and place order. The user can also drill down into a quote to update it. This helps improve the day-to-day transactional quoting efficiencies.

Sales Managers can track quote performance metrics such as quote conversion, the average time to convert the quote to an order, product related metrics and the effect of discounts on quote conversion. This allows them to focus the sales force on top revenue potential, identify and target high value quotes. The approval related metrics help Sales Managers identify bottlenecks in the approval process and subsequently streamline it.

Oracle Quoting Information Discovery Plus User Interface and Integration

Quote Performance Page

The Quote Performance page displays the quote performance metrics. As a sales manager, if you have access to the Quoting Endeca Quote Access Role, then you can use this page to quickly identify bottlenecks in the approval process and subsequently streamline it.



Region	Components
Tip	Displays the last date and time the quote data was refreshed.
Currency	Displays the quote currency.

Region	Components
Search • Boolean Search • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • BILL_TO_PARTY_NAME • SHIP_TO_PARTY_NAME • SOLD_TO_PARTY_NAME • RESOURCE_NAME • SALES_PERSON • SOLD_CONTACT_PARTY_NAME • SOLD_TO_PARTY_NAME • INVENTORY_ITEM • SOLD_CUST_PARTY_NAME • BILL_CONTACT_PARTY_NAME • QUOTE_NAME • PARTY_NAME

Region	Components
	• SHIP_CONTACT_PARTY_NAME • LONG_DESCRIPTION • CUSTOMER_NAME
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Quotes • Products • Customers • Dates • Amount
Create Quote	Click this button to create a new quote. The Create Quote page displays.

Region	Components
Summarization Bar	The details displayed are: • Quotes - total number of quotes • Quotes Amount - the quote total for the quotes in the metric Quotes • Successful Quotes - total number of quotes that were converted to a sales order. • Successful Quotes Amount - the quote total for the quotes in the metric Successful Quotes. • Open Quotes - quote total of active quotes • Open Quotes Amount - quote total of active quotes • Quote Conversion % - the ratio of the number of quotes converted to a sales order to the number of quotes created. • Quote Conversion Amount % - the ratio of the quote total for the number of quotes converted to a sales order to the quote total for the quotes created. • Days for Conversion - the average number of days taken to convert the quote to a sales order.

Region	Components
Quotes tab	This tab displays the following Quote results based on the refinements you choose. The details you can view are: • Quotes - The chart displays quote information that you could sort using the Quote Number and Quote Number by Quote Total, Quote Total Sum by Quote Number, Margin Amount Sum by Quote Number.sort options available. You can choose to alter the display in the chart by choosing the options available in the Value axis, Category axis, and Color list of values. Additionally, you can Export, Print, or Save the Image. • Products - The chart displays product information that you could sort using the Product and Product by Total Price sort options. You can also alter the display in the chart by choosing options available in the Value axis, Category axis, and Color list of values. Additionally, you can Export, Print, or Save the Image. • Quotes results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results. **Note:** You must select two or more lines to compare records. • Lines results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results.

Region	Components
	Note: You must select two or more lines to compare records.

Region	Components
Performance tab	This tab displays the following Performance results based on the refinements you choose. The details you can view are: • Quotes - The chart displays quote information that you could sort using the Creation Month and Creation Month by Record Count sort options available. You can choose to alter the display in the chart by choosing the options available in the Value axis, Category axis, and Color list of values. Additionally, you can Export, Print, or Save the Image. • Products - The chart displays product information that you could sort using the Creation Month and Creation Month by Total Price sort options. You can also alter the display in the chart by choosing options available in the Value axis, Category axis, and Color list of values. Additionally, you can Export, Print, or Save the Image. • Primary Sales Group results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results. **Note:** You must select two or more lines to compare records. • Approvers results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results.

Region	Components
	Note: You must select two or more lines to compare records.

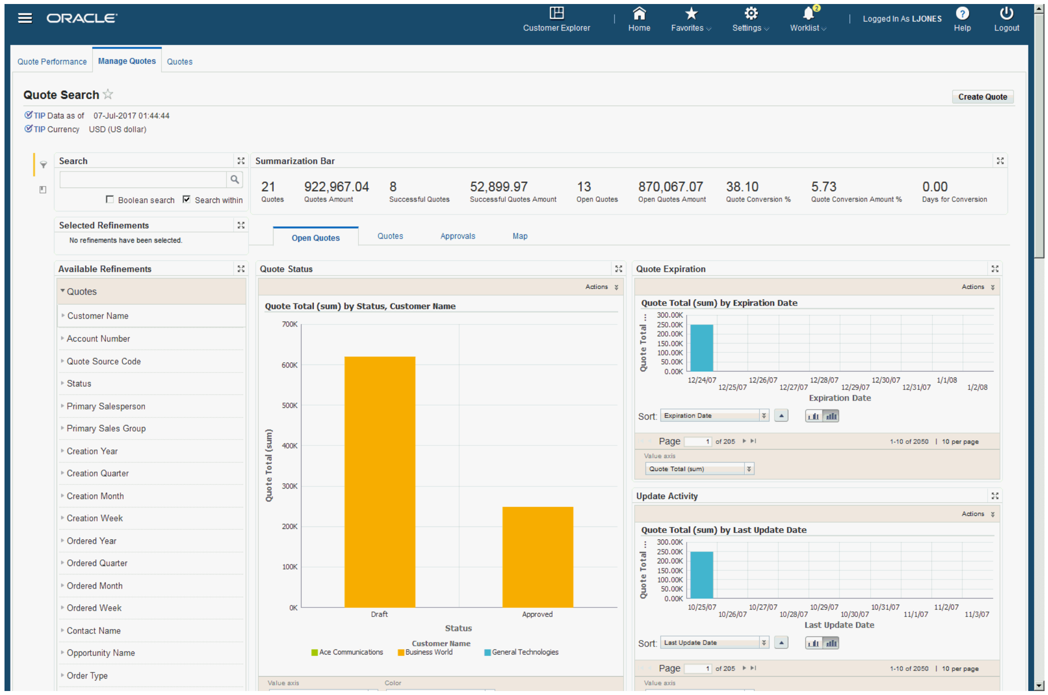
Region	Components

Approvals tab	This tab displays the following Approval results based on the refinements you choose. The details you can view are:
	• Summarization Bar - this displays the following details:
	  • Approval Submissions - Total number of quotes submitted for approval
	  • Approval Submissions % - The ratio of number of quotes submitted for approval to the number of quotes
	  • Approved Submissions - Total number of approved quotes
	  • Approved Submissions % - The ratio of number of approved quotes to the number of quotes that were submitted for approval
	  • Average Number of Approvers - The average number of approvers in a quote
	  • Average Days to Approve - The average number of days to approve a quote
	• Rules - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results.
	Note: You must select two or more lines to compare records.
	• Approvals results table - displays the

Region	Components
	results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results. **Note:** You must select two or more lines to compare records. • Approvers results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results. **Note:** You must select two or more lines to compare records.
Map tab	This tab displays Quotes information based on the refinements you choose in a map. The details you can view are: • Cities - displays the list of cities. You can toggle the display between a cloud view and a list view. • Map - The map displays the number of quotes based on cities. You can sort the results based on the Default Sort, Customer Name, and Address.

Manage Quotes Page

The Manage Quotes page enables you, as a sales representative user to manage quotes. This page enables you to perform several quote actions such as place order from the dashboard and drill down into a quote for further updates. If you have access to the Quoting Endeca Search Access Role, then you can access this page from the Quoting User responsibility.



Region	Components
Tip	Displays the last date and time the quote data was refreshed.
Currency	Displays the quote currency.

Region	Components
Search • Boolean Search • Search Within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details. Partial record search is enabled for specific attributes. Attributes for partial record search include: • BILL_TO_PARTY_NAME • SHIP_TO_PARTY_NAME • SOLD_TO_PARTY_NAME • RESOURCE_NAME • SALES_PERSON • SOLD_CONTACT_PARTY_NAME • SOLD_TO_PARTY_NAME • INVENTORY_ITEM • SOLD_CUST_PARTY_NAME • BILL_CONTACT_PARTY_NAME • QUOTE_NAME • PARTY_NAME

Region	Components
	• SHIP_CONTACT_PARTY_NAME • LONG_DESCRIPTION • CUSTOMER_NAME
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Quotes • Products • Customers • Dates • Amount
Create Quote	Click this button to create a new quote. The Create Quote page displays.

Region	Components
Summarization Bar	The details displayed are: • Quotes - total number of quotes • Quotes Amount - the quote total for the quotes in the metric Quotes • Successful Quotes - total number of quotes that were converted to a sales order. • Successful Quotes Amount - the quote total for the quotes in the metric Successful Quotes. • Open Quotes - quote total of active quotes • Open Quotes Amount - quote total of active quotes • Quote Conversion % - the ratio of the number of quotes converted to a sales order to the number of quotes created. • Quote Conversion Amount % - the ratio of the quote total for the number of quotes converted to a sales order to the quote total for the quotes created. • Days for Conversion - the average number of days taken to convert the quote to a sales order.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Open Quotes tab</td><td>This tab displays the following Open Quote results based on the refinements you choose. The details you can view are:

Quote Status - The chart displays quote status information that you could sort using the Quote Total and Record Count sort options available. You can choose to alter the display in the chart by choosing the options available in the Value axis and Color list of values. Additionally, you can Export, Print, or Save the Image.
Quote Expiration - The chart displays quote expiration information that you could sort using the Expiration Date and Expiration Date by Quote Total sort options. You can also alter the display in the chart by choosing options available in the Value axis list of values. Additionally, you can Export, Print, or Save the Image.
Update Activity - The chart displays update activity information that you can sort using the Last Update Date and Last Update Date by Quote Total sort options. You can also alter the display in the chart by choosing options available in the Value axis list of values. Additionally, you can Export, Print, or Save the Image.
Quotes results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also perform the following actions:

Print
Export
Compare

</td></tr>
</table>

Region	Components
	Note: You must select two or more lines to compare records. • Create New Version **Note:** You must select a line to create a new version. • Duplicate Quote **Note:** You must select a line to duplicate a quote. • Place Order **Note:** You must select a line to place an order. • Print Quote **Note:** You must select a line to print a quote. • View Commission **Note:** You must select a line to view the commission. • Products results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results.

Region	Components
	Note: You must select two or more lines to compare records.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Quotes tab</td><td>This tab displays the following Quote results based on the refinements you choose. The details you can view are:
Quotes - The chart displays quote information that you could sort using the Quote Number and Quote Number by Quote Total, Quote Total Sum by Quote Number, Margin Amount Sum by Quote Number.sort options available. You can choose to alter the display in the chart by choosing the options available in the Value axis, Category axis, and Color list of values. Additionally, you can Export, Print, or Save the Image.
Products - The chart displays product information that you could sort using the Product and Product by Total Price sort options. You can also alter the display in the chart by choosing options available in the Value axis, Category axis, and Color list of values. Additionally, you can Export, Print, or Save the Image.
Quotes results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also perform the following actions:
Print
Export
Compare
Note: You must select two or more lines to compare records.
Create New Version</td></tr>
</table>

Region	Components
	Note: You must select a line to create a new version. • Duplicate Quote **Note:** You must select a line to duplicate a quote. • Place Order **Note:** You must select a line to place an order. • Print Quote **Note:** You must select a line to print a quote. • View Commission **Note:** You must select a line to view the commission. **Note:** You must select two or more lines to compare records. • Lines results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results.

Region	Components

Approvals tab	This tab displays the following Approval results based on the refinements you choose. The details you can view are:
	• Summarization Bar - this displays the following details:
	  • Approval Submissions - Total number of quotes submitted for approval
	  • Approval Submissions % - The ratio of number of quotes submitted for approval to the number of quotes
	  • Approved Submissions - Total number of approved quotes
	  • Approved Submissions % - The ratio of number of approved quotes to the number of quotes that were submitted for approval
	  • Average Number of Approvers - The average number of approvers in a quote
	  • Average Days to Approve - The average number of days to approve a quote
	• Rules results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results.
	Note: You must select two or more lines to compare records.
	• Approvals results table - displays the

Region	Components
	results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results. **Note:** You must select two or more lines to compare records. • Approvers results table - displays the results in a tabular format. You can click any of the available links in the table to refine further based on that value. Use the View Options to Hide/Show Columns, Sort, or Reset Table to Default. You can also Export, Print or Compare the results. **Note:** You must select two or more lines to compare records.
Map tab	This tab displays Quotes information based on the refinements you choose in a map. The details you can view are: • Cities - displays the list of cities. You can toggle the display between a cloud view and a list view. • Map - The map displays the number of quotes based on cities. You can sort the results based on the Default Sort, Customer Name, and Address.

Oracle Quoting Information Discovery Plus Product Configuration

Overview

Complete the Oracle Quoting Information Discovery Plus product configuration after the installation and common configurations are completed as described in the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1).

Setting Up Oracle Quoting Information Discovery Plus

1. Grant the chosen role to the predefined Quoting User responsibility. You can grant the Quoting Endeca Quote Access Role or the Quoting Endeca Search Access Role, or both depending on your business requirements. You can also grant the roles to any custom Oracle Quoting Information Discovery Plus responsibility.

   See: *Oracle E-Business Suite System Administrator's Guide - Security* for more information on how to assign roles.

   See: Roles in Oracle Quoting Information Discovery Plus, page 28-27

2. Set up the Profile Options.

   See: Setting Up Profile Options, page 28-24

3. Run the Full Load Graph.

   See: Running the Full Load Graph, page 28-25

4. Set up the Scheduler.

   See: Setting Up the Scheduler for Incremental Refresh, page 28-25

Setting Up Profile Options

Oracle Quoting Information Discovery Plus uses the following profile options:

- **ASO: Days for Full Data Load:** Use this profile option to control the number of days for which the full load graph pulls data. By default, the value is Null. If the value is Null, then the full load graph pulls data for the previous 90 days. You can change this value to any positive numeric value. The data pulled from the Quoting tables is based on the date attribute last updated.

- **ASO: Common Currency for Reports:** Use this profile option to convert the quote currency to the currency specified in this profile. The possible values are the list of currencies.

Running the Full Load Graph

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes.

To run a full Endeca Refresh on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Quoting Full Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select qot from the Sandbox list, based on the module for which you are running the full load.
13. Select graph/FullLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Setting Up the Scheduler for Incremental Refresh

Once you have run the full load graph in accordance with the *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* document (Doc ID: 2214431.1), attribute configuration is loaded for all seeded attributes. For incremental refresh, you must determine how often the Endeca data should be refreshed from EBS depending upon your organizational requirements. Oracle recommends that you keep this near real time. As the data is updated in the EBS, you need to ensure it is updated in the endeca MDEX server. You set up the Scheduler to load incremental graphs depending on the amount of quote information requiring update.

To set up the scheduler:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler, for example, Quoting Incremental Load Scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Execute graph from the Task Type list.
12. Select qot from the Sandbox list, based on the module for which you are running the full load.
13. Select graph/IncrementalLoadConfig.grf from the Graph list.
14. Click Create to set the scheduler.

Technical Integration Components

Roles in Oracle Quoting Information Discovery Plus

The following roles are available in Oracle Quoting Information Discovery Plus:

Role Name	Code
Quoting Endeca Quote Access Role	UMX|QOT_ENDECA_QUOTES_ACCESS_ROLE
Quoting Endeca Search Access Role	UMX|QOT_ENDECA_SEARCH_ACCESS_ROLE

Menus and Functions in Oracle Quoting Information Discovery Plus

The following functions are available for the Quoting Quotes Tab (QOT_QUOTES_TAB) menu in Oracle Quoting Information Discovery Plus:

Function Code	User Function Name	Function Type	Web HTML Call
QOT_ENDECA_QUOTES	Quoting Endeca Quotes	SSWA jsp function	GWY.jsp?targetAppType=Endeca&targetPage=web/qot/qot_endeca_quotes
QOT_ENDECA_QUOTES_LANDING_PG	Quoting Endeca Quotes Landing Page	SSWA jsp function	OA.jsp?page=/oracle/apps/qot/endeca/webui/QotEndecaQuotesPG&addBreadCrumb=Y&OAHP=QOT_QUOTE_ROOT&OASF=QOT_ENDECA_QUOTES_LANDING_PG
	Quoting Endeca Search	SSWA jsp function	GWY.jsp?targetAppType=Endeca&targetPage=web/qot/qot_endeca_search

Views and Joins in Oracle Quoting Information Discovery Plus

The following view is available in Oracle Quoting Information Discovery Plus:

- **ASO_EID_LINES_V** - This view loads new or updated quotes since last successful ETL run.

29

Oracle TeleService Information Discovery Plus

This chapter covers the following topics:

Overview

You can use Oracle TeleService Information Discovery Plus to search and filter all service requests imported into Endeca. Using the Service Operations Dashboard, you can review critical metrics, tag clouds, interact with graphs, and view service requests details. In addition to the search and filter capabilities, the Service Operations Dashboard contains action-based analytics where you can diagnose an issue and perform efficient and effective corrective actions on those service requests. Examples of corrective actions include reassigning requests to the appropriate group or owner, diagnosing issues, or contacting customers for additional information.

The Service Operations Dashboard is a container page in CRM Service. The page regions and tabs call the respective page from an Endeca environment. In Oracle TeleService, the dashboard enables search functions using Endeca Information Discovery integration:

- **Service Operations Dashboard:** The Service Operations Dashboard is the default landing page for users with the Service Operations responsibility. You can configure this page to be the default landing page of any service user by changing their menu. It utilizes the collection of Endeca components to highlight problem areas and other areas of interest for service managers or service agents to manage and maintain the health of their call center.

  The dashboard page consists of two sub-tabs:

  - **Open Service Requests** - displays metrics and information for open service requests only.

  - **All Service Requests** - displays the same basic layout (with minor differences) and includes all service requests.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for Oracle TeleService Information Discovery Plus for the Oracle Endeca application. This supplements information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

Oracle TeleService Information Discovery Plus User Interfaces

Service Operations Dashboard

The Endeca Service Operations Dashboard identifies service requests that require immediate attention and allows Service Managers to perform corrective actions on those service requests. Service Managers can search using service request attributes, available refinements, date ranges, and display search information using associated key metrics, charts and tables. The Service Operations Dashboard contains two sub-tabs:

- **Open Service Requests** - displays metrics, charts and tables for open service requests that are currently imported into Endeca.

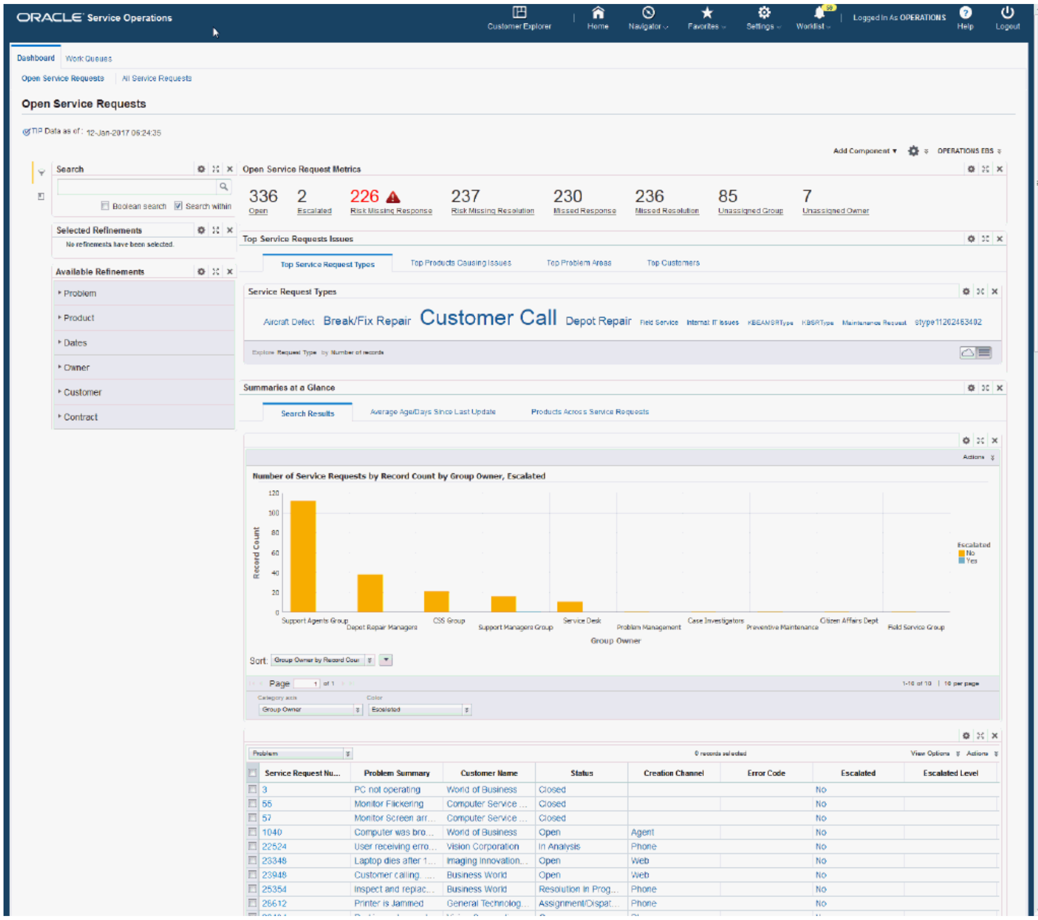
- **All Service Requests** - displays metrics, charts and tables for all service requests that are currently imported into Endeca. This provides analysis on specific historical data that is helpful for resource planning or performance tracking of call centers.

  Note: The structure of the two pages is the same with only minor differences.

You can select the Work Queues tab to navigate to the core Customer Support Agent Dashboard to create and update service requests. You can also perform specific actions directly from the Service Operations Dashboard, or navigate to the core Update Service Requests page to make updates. This is available from links associated with a specific service request in the Dashboard tables. The following is a partial display of the Service Operations Dashboard page.

From the Service Operations responsibility, navigate to the Service Operations Dashboard:

(N) Service Operations > Dashboard



Within the Service Operations Dashboard, you can view and analyze areas with respect to service requests using display tools that include metrics, charts, graphs, and tables. The following describes the Endeca Service Operations Dashboard regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components
Available Refinements	The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names: • Problem • Product • Dates • Owner • Customer • Contract

Region	Components
Open Service Request Metrics (summarization bar)	• **Open** Number of service requests which have been set to a status that is NOT defined with the flag 'Final' checked. • **Escalated** Number of open service requests that have been escalated (escalation document exists and is active for the service request). • **Response in Jeopardy** Open service requests that are in jeopardy of missing the expected respond-by-date. **Note:** Expected response date – current date <= expected response buffer => In jeopardy • **Resolution In Jeopardy** Open service requests that are in jeopardy of missing the expected resolve-by-date. **Note:** Expected resolution date – current date <= expected resolution buffer => In jeopardy • **Missed Response** Number of open service requests that have failed to respond by the expected respond-by date. • **Missed Resolution** Number of open service requests that have failed to be resolved by the expected resolution date. • **Unassigned**

Region	Components
	Open service requests that have not been assigned to a group or individual owner. • **Unassigned Owner** Open service requests that have been assigned to a group owner, but not an individual owner.
Top Service Requests Issues (tabbed tag cloud container)	Top Service Request Types (tab) **Note:** The Top Service Request Types tag cloud displays the top ten service request types that are reported on currently open service requests. Service request types display in relative sizes by frequency of occurrence. Top Products Causing Issues (tab) **Note:** The Top Products Causing Issues tag cloud displays the top ten products (items) that are reported on currently open service requests. Products display in relative sizes by frequency of occurrence. Top Problem Areas (tab) **Note:** The Top Problem Areas tag cloud displays the top ten problem codes that are reported on currently open service requests. Problem codes display in relative sizes by frequency of occurrence. Top Customers (tab) **Note:** The Top Customers tag cloud displays the top ten customers that are reported on currently open service requests. Customers display in relative sizes by frequency of occurrence.

Region	Components

Summaries at a Glance (tabbed component container)
 	
Search Results (tab)
 	
Note: For the Open Service Requests dashboard, these sub-tabs only search on open service requests. For the All Service Requests dashboard, these sub-tabs search across all service requests.
	Number of Service Requests by Group Owner, Escalated (chart)
	
	• Sort Options
	  • Group Owner
	  • Group Owner by Record Count
	• Group Dimensions (category axis)
	  • Group Owner
	  • Individual Owner
	  • Item Name
	  • Request Type
	  • Problem Code
	  • Customer Name
	  • Creation Channel
	  • Status
	  • Internal Severity
	  • Urgency
	• Series Dimensions (color)
	  • (none)
	  • Escalated
	  • Response in Jeopardy
	  • Resolution in Jeopardy
	  • Missed Response

Region	Components
	- Missed Resolution - Unassigned - Unassigned Owner Results Table - Column Sets - Problem - Customer - Product - Dates - Owner - Contract - View Options - Conditional formatting - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export to Microsoft Excel - Mass Update Service Requests **Note:** Service Managers can select

Region	Components
	multiple records and then Mass Update Service Requests to open the Mass Service Request Update: Modify page where they can update service request criteria for those selected requests.

Region	Components

Summaries at a Glance (tabbed component container)
 	
Missed Response / Resolution (tab)
 	
Note: For the Open Service Requests dashboard, these sub-tabs only search on open service requests. For the All Service Requests dashboard, these sub-tabs search across all service requests.
	Service Requests with Missed Response (chart)
	
	• Sort Options
	    • Group Owner
	    • Group Owner by Record Count
	• Group Dimensions (category axis)
	    • Group Owner
	    • Individual Owner
	    • Item Name
	    • Request Type
	    • Problem Code
	    • Customer Name
	    • Creation Channel
	    • Status
	    • Internal Severity
	    • Urgency
	• Series Dimensions (color)
	    • (none)
	    • Escalated
	    • Age of Service Request
	    • Days Since Last Update
	    • Resolution in Jeopardy

Region	Components

	- Missed Response Days
	- Missed Resolution
	- Missed Resolution Days
	- Unassigned
	- Unassigned Owner
	
	Service Requests with Missed Response (results table)
	- Column Sets
	  - Problem
	  - Product
	  - Dates
	  - Owner
	  - Customer
	  - Contract
	- View Options
	  - Conditional formatting
	  - Hide / Show Columns
	  - Sort
	  - Reset table to default
	- Actions
	  - Print
	  - Export to Microsoft Excel

Region	Components

	Note: Service Managers can select the Service Request Number link to display the Update Service Request page for the selected record.
	
	Service Requests with Missed Resolution (chart)
	• Sort Options
	  • Group Owner
	  • Group Owner by Record Count
	• Group Dimensions (category axis)
	  • Group Owner
	  • Individual Owner
	  • Item Name
	  • Request Type
	  • Problem Code
	  • Customer Name
	  • Creation Channel
	  • Status
	  • Internal Severity
	  • Urgency
	• Series Dimensions (color)
	  • (none)
	  • Escalated

Region	Components

	• Age of Service Request
	• Days Since Last Update
	• Missed Resolution Days
	• Missed Response
	• Missed Response Days
	• Unassigned
	• Unassigned Owner
	
	Service Requests with Missed Resolution (results table)
	• Column Sets
	  • Problem
	  • Product
	  • Dates
	  • Owner
	  • Customer
	  • Contract
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print

Region	Components
	• Export to Microsoft Excel **Note:** Service Managers can select the Service Request Number link to display the Update Service Request page for the selected record.

Region	Components

Summaries at a Glance (tabbed component container)
 	
Escalated (tab)
 	
Note: For the Open Service Requests dashboard, these sub-tabs only search on open service requests. For the All Service Requests dashboard, these sub-tabs search across all service requests.
	Open Escalated Service Requests (chart)
	• Sort Options
	  • Group Owner
	  • Group Owner by Record Count
	• Group Dimensions (category axis)
	  • Group Owner
	  • Individual Owner
	  • Item Name
	  • Request Type
	  • Problem Code
	  • Customer Name
	  • Creation Channel
	  • Status
	  • Internal Severity
	  • Urgency
	• Series Dimensions (color)
	  • (none)
	  • Age of Service Request
	  • Days Since Last Update
	  • Escalated Level
	  • Response in Jeopardy
	  • Resolution in Jeopardy

Region	Components

	- Missed Response
	- Missed Resolution
	- Unassigned
	- Unassigned Owner
	
	Open Escalated Service Requests (results table)
	- Column Sets
	  - Problem
	  - Product
	  - Dates
	  - Owner
	  - Customer
	  - Contract
	- View Options
	  - Conditional formatting
	  - Hide / Show Columns
	  - Sort
	  - Reset table to default
	- Actions
	  - Print
	  - Export to Microsoft Excel

Region	Components
	Note: Service Managers can select the Service Request Number link to display the Update Service Request page for the selected record.

Region	Components

Summaries at a Glance (tabbed component container)
 	
Jeopardy (tab)
 	
Note: For the Open Service Requests dashboard, these sub-tabs only search on open service requests. For the All Service Requests dashboard, these sub-tabs search across all service requests.
	Service Requests in Jeopardy of Missing Response (chart)
	
	• Sort Options
	    • Group Owner
	    • Group Owner by Record Count
	• Group Dimensions (category axis)
	    • Group Owner
	    • Individual Owner
	    • Item Name
	    • Request Type
	    • Problem Code
	    • Customer Name
	    • Creation Channel
	    • Status
	    • Internal Severity
	    • Urgency
	• Series Dimensions (color)
	    • (none)
	    • Escalated
	    • Age of Service Request
	    • Days Since Last Update
	    • Resolution in Jeopardy

Region	Components
	- Missed Response Days - Missed Resolution - Unassigned - Unassigned Owner Service Requests in Jeopardy of Missing Response (results table) - Column Sets - Problem - Product - Dates - Owner - Customer - Contract - View Options - Conditional formatting - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export to Microsoft Excel

Region	Components

	Note: Service Managers can select the Service Request Number link to display the Update Service Request page for the selected record.
	
	Service Requests in Jeopardy of Missing Resolution (chart)
	• Sort Options
	  • Group Owner
	  • Group Owner by Record Count
	• Group Dimensions (category axis)
	  • Group Owner
	  • Individual Owner
	  • Item Name
	  • Request Type
	  • Problem Code
	  • Customer Name
	  • Creation Channel
	  • Status
	  • Internal Severity
	  • Urgency
	• Series Dimensions (color)
	  • (none)
	  • Escalated

Region	Components

	• Age of Service Request
	• Days Since Last Update
	• Missed Resolution Days
	• Unassigned
	• Unassigned Owner
	
	Service Requests in Jeopardy of Missing Resolution (results table)
	• Column Sets
	  • Problem
	  • Product
	  • Dates
	  • Owner
	  • Customer
	  • Contract
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export to Microsoft Excel

Region	Components
	Note: Service Managers can select the Service Request Number link to display the Update Service Request page for the selected record.

Region	Components

Summaries at a Glance (tabbed component container)
 	
Unassigned (tab)
 	
Note: For the Open Service Requests dashboard, these sub-tabs only search on open service requests. For the All Service Requests dashboard, these sub-tabs search across all service requests.
	Service Requests Unassigned to Group or Individual (chart)
	• Sort Options
	  • Group Owner
	  • Group Owner by Record Count
	• Group Dimensions (category axis)
	  • Item Name
	  • Request Type
	  • Problem Code
	  • Customer Name
	  • Creation Channel
	  • Status
	  • Internal Severity
	  • Urgency
	• Series Dimensions (color)
	  • (none)
	  • Escalated
	  • Age of Service Request
	  • Response in Jeopardy
	  • Resolution in Jeopardy
	  • Missed Response
	  • Missed Response Days

Region	Components

	- Missed Resolution
	- Missed Resolution Days
	
	Service Requests Unassigned to Group or Individual (results table)
	
	- Column Sets
	  - Problem
	  - Product
	  - Dates
	  - Owner
	  - Customer
	  - Contract
	- View Options
	  - Conditional formatting
	  - Hide / Show Columns
	  - Sort
	  - Reset table to default
	- Actions
	  - Print
	  - Export to Microsoft Excel
	
	Note: Service Managers can select the Service Request Number link to display the Update Service Request page for the selected record.

Region	Components

	Service Requests Assigned to Group But Not to Individual (chart)
	• Sort Options
	  • Group Owner
	  • Group Owner by Record Count
	• Group Dimensions (category axis)
	  • Group Owner
	  • Item Name
	  • Request Type
	  • Problem Code
	  • Customer Name
	  • Creation Channel
	  • Status
	  • Internal Severity
	  • Urgency
	• Series Dimensions (color)
	  • (none)
	  • Escalated
	  • Age of Service Request
	  • Response in Jeopardy
	  • Resolution in Jeopardy
	  • Missed Response

Region	Components
	- Missed Response Days - Missed Resolution - Missed Resolution Days Service Requests Assigned to Group But Not To Individual (results table) - Column Sets - Problem - Product - Dates - Owner - Customer - Contract - View Options - Conditional formatting - Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export to Microsoft Excel **Note:** Service Managers can select the Service Request Number link to display the Update Service Request

Region	Components
	page for the selected record.

Region	Components

Summaries at a Glance (tabbed component container)
 	
Open (tab)
 	
Note: The Open tab appears only when you select All Service Requests from the Dashboard.
	Open Service Requests (chart)
	
	• Sort Options
	    • Group Owner
	    • Group Owner by Record Count
	• Group Dimensions (category axis)
	    • Group Owner
	    • Individual Owner
	    • Item Name
	    • Request Type
	    • Problem Code
	    • Customer Name
	    • Creation Channel
	    • Status
	    • Internal Severity
	    • Urgency
	• Series Dimensions (color)
	    • (none)
	    • Escalated
	    • Age of Service Request
	    • Days Since Last Update
	    • Response in Jeopardy
	    • Resolution in Jeopardy

Region	Components

	• Missed Resolution
	• Missed Response
	• Unassigned
	• Unassigned Owner
	
	Open Service Requests (results table)
	• Column Sets
	  • Problem
	  • Product
	  • Dates
	  • Owner
	  • Customer
	  • Contract
	• View Options
	  • Conditional formatting
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export to Microsoft Excel
	
	Note: Service Managers can select the

Region	Components
	Service Request Number link to display the Update Service Request page for the selected record.

Region	Components

Summaries at a Glance (tabbed component container)
 	
Average Age / Days Since Last Update (tab)
 	
Note: For the Open Service Requests dashboard, these sub-tabs only search on open service requests. For the All Service Requests dashboard, these sub-tabs search across all service requests.
	Average Age of Service Requests (chart)
	• Sort Options
	    • Group Owner
	    • Group Owner by Age of Service Request (average)
	• Group Dimensions (category axis)
	    • Group Owner
	    • Individual Owner
	    • Item Name
	    • Request Type
	    • Problem Code
	    • Customer Name
	    • Creation Channel
	    • Status
	    • Internal Severity
	    • Urgency
	• Series Dimensions (color)
	    • (none)
	    • Escalated
	
	Average Days Since Last Update
	• Sort Options
	    • Group Owner

Region	Components
	- Group Owner by Days Since Last Update (average) • Group Dimensions (category axis) - Group Owner - Individual Owner - Item Name - Request Type - Problem Code - Customer Name - Creation Channel - Status - Internal Severity - Urgency • Series Dimensions (color) - (none) - Escalated

Oracle TeleService Information Discovery Plus Product Configuration

Setting Up Oracle TeleService Information Discovery Plus

The Oracle TeleService application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle TeleService Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 29-35 by assigning UMX roles and updating access grants.
2. Load service request data, page 29-36 to the Endeca Data Domain by running graphs provided by TeleService.
3. Schedule Setup for Full Endeca Refresh, page 29-36.
4. Set Profile Options, page 29-38.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle TeleService Information Discovery Plus

As part of the Oracle E-Business Suite-EID integration for the Oracle TeleService application, the following UMX Role is provided:

UMX Role	Internal Code Name
CS Endeca Access Role	UMX|CS_ENDECA_ACCESS_ROLE

Permission Set	Internal Code Name
Service Endeca Access Permission Set	CS_ENDECA_ACCESS_PS

You must add the UMX role 'CS Endeca Access Role' (Internal Code Name:

UMX|CS_ENDECA_ACCESS_ROLE) to enable Endeca menus for the Service Operations responsibility (or any other custom responsibility which is using the same menu). You must assign this UMX role to the responsibility. When this UMX role is assigned to Service Operations, the Dashboard tab appears.

If you want to use the Endeca-related role with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process instead of while you are adding the role to the responsibility.

Access Grant	Internal Code Name
Service Endeca Access Grant	CS_ENDECA_ACCESS_GRANT

Complete the following steps to enable Endeca Menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.
2. Update CS_ENDECA_ACCESS_GRANT Grant.

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Loading Service Manager Data into the Endeca Data Domain

Clover ETL within Endeca queries TeleService Views and does a full data load to the TeleService data domain in Endeca. After the first data load, full data load or incremental data load can be performed periodically. Incremental data load will update all the records in Endeca TeleService data domain which were updated in EBS after the last load. After the data has been loaded in the TeleService data domain, it can be queried and shown in the Dashboard pages.

TeleService Data Sources in the TeleService Data Domain

Two data sources are defined in the TeleService data domain in Endeca and are used to query data for different pages in TeleService. These data sources include:

- **cs-service**: This is the parent data source and queries all service request information.
- **cs-service-open**: This is the child data source and queries open service requests only.

Setting Up the Scheduler for Endeca Full Refresh

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select the graph for schedule to run. I.e. Full.grf/incremental.grf.
13. Click Create to set the scheduler.

ETL Parameters for Oracle TeleService

You can load data to the TeleService data domain by running graphs provided by TeleService.

To load data to the TeleService data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under TeleService.
2. Graphs to load data include:
   - **LoadDataFull.grf**: This graph loads all service request data from the EBS layer

(CS_ENDECA_SERVICE_DTLS_V) into Endeca.

> **Note:** If you are loading data for the first time, then run Full.grf only. You can run other graphs according to your requirements. Run Incremental.grf periodically. You can set up this graph from the Scheduling tab.

- **IncrementalLoad.grf**: This graph performs incremental load for all service requests. Only those records that were updated subsequent to the last load are loaded.

> **Note:** Data deleted in EBS Service will not be removed from Endeca by running the Incremental Load Graph. You must run Full.grf graph to remove all the data from Endeca and reload everything.

Profile Options for Oracle TeleService Information Discovery Plus

You must set the following profile option if you do not want to load all historical data. Oracle recommends that you load data for all years. If you do not set the following profile option, then all service request data will be loaded.

User Profile Name	Internal Profile Name	Description
Service: Endeca Service Request Load Start Date	CS_ENDECA_SR_LOAD_START_DATE	This profile option is used to determine which service requests qualify for import into the data-source. Only closed service requests with a last updated date less than 'x' days from the sysdate qualifies for import. If no value is specified, then all open service requests will be imported. All closed service requests which closed within 90 days will then be considered.

User Profile Name	Internal Profile Name	Description
Service: Endeca Service Request Filter	CS_ENDECA_SR_FILTER	This profile option is used to specify the filter criteria for service requests. There are three valid values to choose from: • All Service Requests • My Group's and My Service Requests • My Service Requests

Views and Joins for Oracle TeleService Information Discovery Plus

The following view is used by the ETL layer in Endeca to load service request data into the Endeca data domain:

View Name	Purpose
CS_ENDECA_SERVICE_DTLS_V	Loads service request data

Menus for Oracle TeleService Information Discovery Plus

Endeca TeleService integration includes the following user menu functions:

User Function Name	Function Name
Service Endeca Root Menu	CS_ENDECA_ROOT_MENU
Service Endeca Open-All Service Requests	CS_ENDECA_OPEN_ALL_SERVICE_REQUESTS_MENU

30

Oracle Warehouse Management Information Discovery Plus

This chapter covers the following topics:

Overview

You can use Oracle Warehouse Management (WMS) Information Discovery to search and filter outbound, inventory, and labor (productivity) information from the warehouse. Using the Warehouse Management Information Discovery Plus pages, you can review and analyze data using key Performance Indicators (KPIs), performance evaluation metrics, charts, graphs, and tables. In addition to the search and filter capabilities, each WMS page contains action-based analytics where you can diagnose an issue and take specific actions.

You can search using Warehouse Management pages and Endeca Information Discovery (EID) design tools. These pages are container pages in WMS and each page, region, and tab calls the respective page from an Endeca environment. In Warehouse Management, the following pages enable search functions using Endeca Information Discovery integration:

- **Plan Fulfillment page:** The Plan Fulfillment page lets you search for and plan the fulfillment batches and waves.
- **Track Fulfillment page:** The Track Fulfillment page lets you track the fulfillment process and react in real-time to changes impacting outbound activities.
- **Space Utilization page:** The Space Utilization page lets you track the fragmentation in the warehouse and suggest material movement to manage fragmentation.
- **Labor Utilization page:** The Labor Utilization page lets you plan and manage labor in the warehouse.

This chapter provides product-specific details required to integrate Endeca Information Discovery (EID) with Oracle E-Business Suite Release 12.2 V8 for the Oracle Warehouse Management Information Discovery Plus application. This supplements information provided in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). You must read this document and make note of the requirements before you begin your installation.

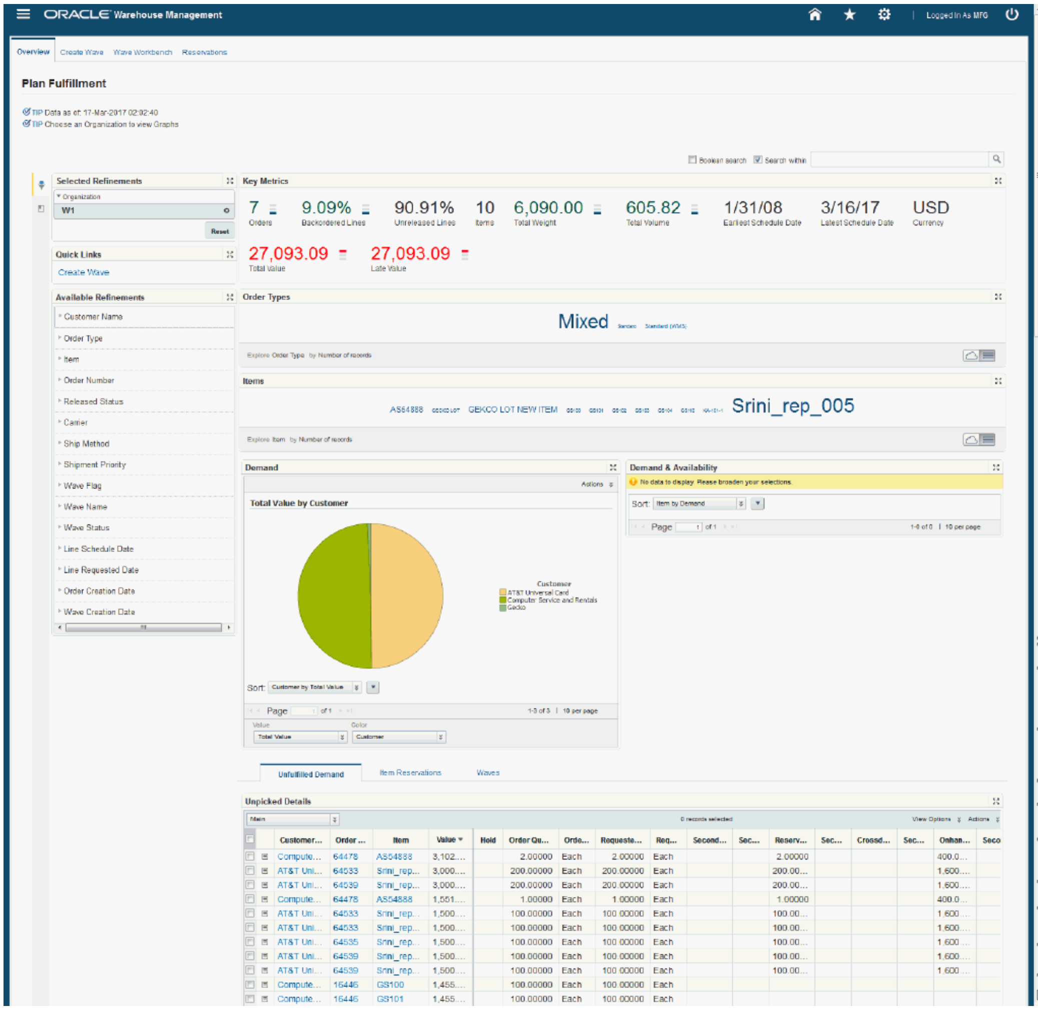
Oracle Warehouse Management Information Discovery Plus User Interfaces

Plan Fulfillment Page

The Plan Fulfillment page lets you plan the fulfillment batches and waves, and view unfulfilled details including late, early, on time, and so on. You can also view details and order lines that do not have adequate on-hand inventory and take appropriate actions such as updating or deleting the reservation, and release a picking batch. You can view outbound logistics metrics, charts, and results tables. The following displays the Plan Fulfillment page.

From the Warehouse Manager responsibility, navigate to the Plan Fulfillment page:

(N) Outbound Logistics > Plan Fulfillment



The following describes the Warehouse Management Plan Fulfillment page regions and components:

Region	Components
Sub Tabs (page links)	• **Overview** - Select this sub-tab to navigate to the Plan Fulfillment Endeca page. • **Create Wave** - Use the Actions menu from the results table to navigate to the Create Wave page. Once you are in the Create Wave page, select the Overview sub-tab to navigate back to the Plan Fulfillment Endeca page. • **Wave Workbench** - From the Waves results table, select the Waves tab and then click the Wave Name link to navigate to the Wave Workbench to release a wave. Once you are in the Wave Workbench, select the Overview sub-tab to navigate back to the Plan Fulfillment Endeca page.
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.

Region	Components
Quick Links	The Quick Links region displays links to associated pages. You can select the Create Wave link to navigate to the Create Wave page. If multiple filter values are selected for an attribute, then the first selected filter value for that corresponding attribute is active and is the default value in the Create Wave' page. The following message displays in the Create Wave page: "Attribute(s) <<ATTRIBUTE1>>, <<ATTRIBUTE2>> have multiple values. Only first value is defaulted."
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Available Refinements</td><td>You can use the Available Refinements component to filter data using the following attributes:

Plan Filter

Organization

Note: Graphs and results tables will NOT display data until you select an Organization. You can select only one Organization. Charts and results tables load data when:

The user selects an Organization from Guided Navigation
The user's responsibility has access to one Organization only

Customer Name
Order Type
Item
Order Number
Released Status
Carrier
Ship Method
Shipment Priority
Wave Flag
Wave Name

</td></tr>
</table>

Region	Components
	• Wave Status • Wave Firm Status • Line Schedule Date • Line Requested Date • Order Creation Date • Wave Creation Date • Additional Header Information (Descriptive Flexfield Attributes) • Additional Line Attribute Information (Descriptive Flexfield Attributes) • Additional Delivery Detail Information (Descriptive Flexfield Attributes)

Region	Components
Key Metrics (summarization bar) **Note:** The Metrics Components are color coded to highlight warnings and health.	• **Orders** Total number of orders with at-least one line that can be fulfilled. >= 200, RED, "High Outbound Load" >= 100 & < 200, YELLOW, "Medium Outbound Load" < 100, GREEN, "Low Outbound Load" • **Backordered Lines** Percent of order lines with at least one detail in back-ordered status. "BO Lines > 50% of Total", RED, "High Backorder" "BO Lines < 10% of Total", GREEN, "Low Backorder" • **Unreleased Lines** Percent of unreleased order lines. • **Total Value** Total selling value that can be fulfilled in the appropriate currency based on unit selling price and unfulfilled. >= 20K, RED, "High Outbound Load" >= 10K & < 20K, YELLOW, "Medium Outbound Load" < 10K, GREEN, "Low Outbound Load" • **Late Value** Total selling value that can be fulfilled in the appropriate currency based on unit selling price and unfulfilled quantity on LATE order lines. >= 20K, RED, "High Late Performance" >= 10K & < 20K, YELLOW, "Medium Late

Region	Components
	Performance" < 10K, GREEN, "Low Late Performance" • **Items** Total number of unique items that will be fulfilled. • **Total Weight** Total weight (LBS) of the unfulfilled lines based on quantity and item weight. >= 80K, RED, "Heavy" > 20K & < 80K, YELLOW, "Medium" <= 20K, GREEN, "Low" • **Total Volume** Total volume (Cubic Ft.) of the unfulfilled lines based on quantity and item volume. >= 3.4K, RED, "Heavy" > 3K & < 3.4K, YELLOW, "Medium" <= 3K, GREEN, "Low" • **Earliest Schedule Date** Earliest scheduled ship date from unfulfilled order lines. • **Latest Schedule Date** Latest schedule ship date from unfulfilled order lines.
Order Types (tag cloud)	Top Ten Order Types Tag Cloud Component **Note:** The Order Types tag cloud component displays the top ten Order Types by frequency of occurrence.

Region	Components
Items (tag cloud)	Top Ten Items Tag Cloud Component **Note:** The Items tag cloud component displays the top ten items by frequency of occurrence.

Demand (chart)
 	
Note: This chart displays total demand by sale value in the appropriate currency and the primary quantity requested for top and bottom 20. 'Top 20 By Total Value' is the default view.
	Total Value by Item (chart)
	• Sort Options
	  • Customer
	  • Customer by Total Value
	• Dimensions (Value Axis)
	  • Total Value
	  • Total Quantity
	• Series Dimension (Color)
	  • Customer
	  • Item
	  • Carrier
	  • Ship Method
	  • Shipment Priority
	  • Plan Status

Region	Components

Demand & Availability (chart)	Demand, Reserved, Crossdock, On-hand by Item
	• Sort Options
	  • Item
	  • Item by Demand
	  • Item by Reserved
	  • Item by Crossdock
	  • Item by On-hand

Region	Components

Unfulfilled Demand (tabbed component container)
 	
Note: This results table displays relevant attributes for sales order demand and availability.
	Unpicked Details (results table)
	• Column Sets
	  • Main
	  • Line
	  • Detail
	  • Header Descriptive Flexfield
	  • Line Descriptive Flexfield
	  • Detail Descriptive Flexfield
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset Table to Default
	• Actions
	  • Print
	  • Export to Microsoft Excel
	  • Compare
	• Links
	  • Record Details Icon - select this icon to view record details
	  • Customer Name - link to Release Sales Orders For Picking form
	  • Order Number - link to Order Details Page

Region	Components
	• Item - link to Item Details Page

Region	Components

Item Reservations (tabbed component container)	Item Reservations (results table)
	• Column Sets
	  • Main
	  • Other
	Note: The default for the Reservation form can be set with the selected reservation record from the Primary Reserved Quantity column link in the Item Reservations tabbed component container.
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset Table to Default
	Actions
	  • Print
	  • Export
	  • Compare
	  • Update Reservations
	• Links
	  • Record Details Icon - select this icon to view record details
	  • Item - link to the Item Details page.
	  • Primary Reserved Quantity - link to the Item Reservation window to view

Region	Components
	and update item reservation information. • Order Number - link to the Order Details page.

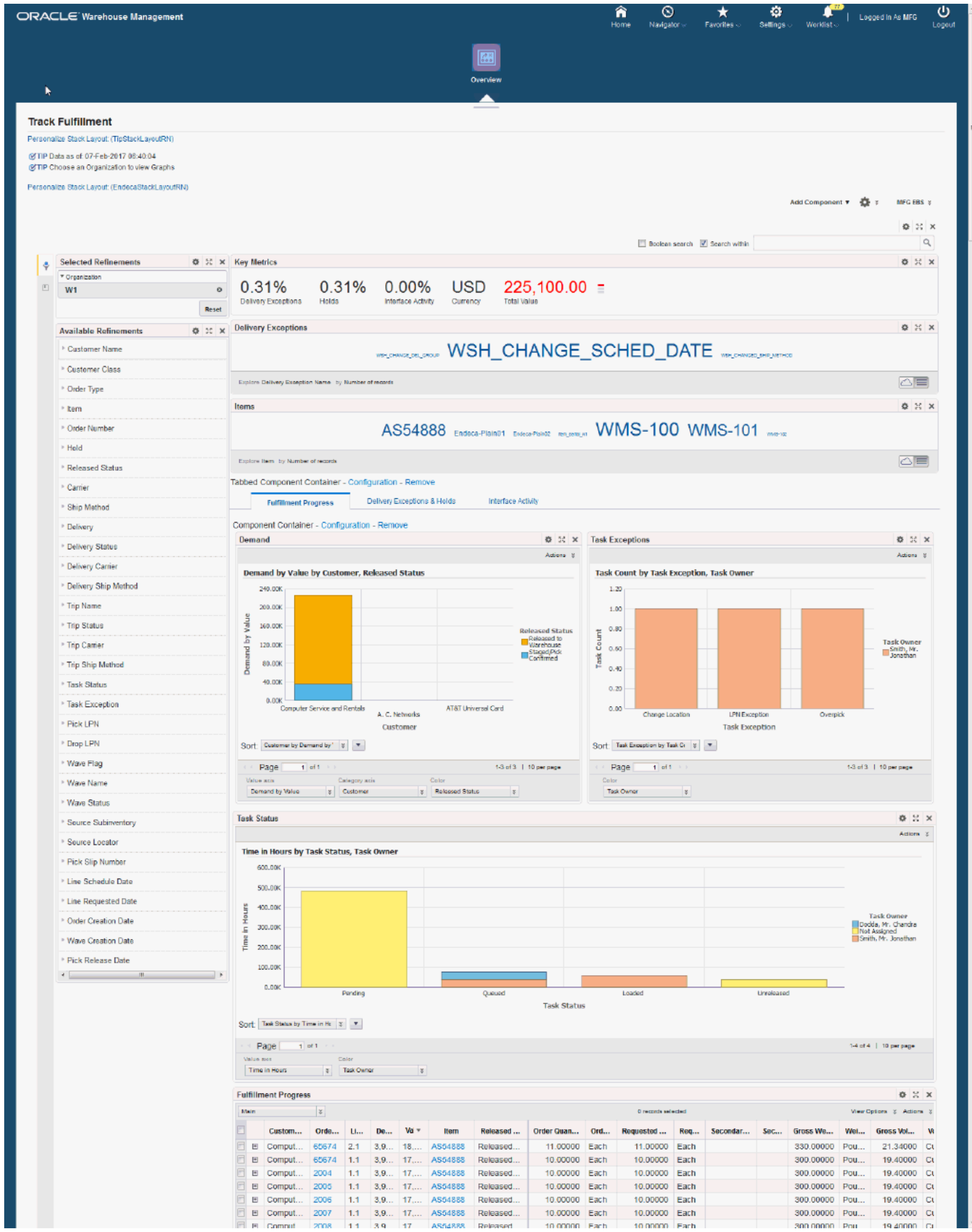
Waves (tabbed component container)
Note: This results table displays Wave details.
	Waves (results table)
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset Table to Default
	• Actions
	  • Print
	  • Export
	  • Compare
	• Links
	  • Wave Name - link to the Wave Workbench to release the wave.

Track Fulfillment Page

The Track Fulfillment page lets you track the fulfillment process and react in real-time to changes impacting the outbound activities. You can view outbound logistics metrics, charts, and results tables. The following is a display of the Track Fulfillment page.

From the Warehouse Manager responsibility, navigate to the Track Fulfillment page:

(N) Outbound Logistics > Track Fulfillment



The following describes the Endeca Warehouse Management Track Fulfillment page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Available Refinements</td><td>You can use the Available Refinements component to filter data using the following attributes:

Track Filter

Organization

Note: Graphs and results tables will NOT display data until you select an Organization. You can select only one Organization. Charts and results tables load data when:

The user selects an Organization from Guided Navigation
The user's responsibility has access to one Organization only

Customer Name
Customer Class
Order Type
Line Type
Item
Order Number
Hold
Released Status
Carrier
Ship Method

</td></tr>
</table>

Region	Components
	• Shipment Priority • Delivery • Delivery Status • Delivery Carrier • Delivery Ship Method • Trip • Trip Status • Trip Carrier • Trip Ship Method • Task Status • Task Exception • Pick LPN • Drop LPN • Wave Flag • Wave Name • Wave Status • Interface Activity • Source Subinventory • Source Locator • Pick Slip Number • Line Schedule Date

Region	Components
	• Line Requested Date • Order Creation Date • Pick Release Date • Additional Delivery Detail Information (Descriptive Flexfield Attributes) • Additional Delivery Information (Descriptive Flexfield Attributes)
Key Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health.	• **Total Value** Total Value of lines being currently fulfilled and as a part of the current data set. >= 20K, RED, "High Outbound Load" >= 10K & < 20K, YELLOW, "Medium Outbound Load" < 10K, GREEN, "Low Outbound Load" • **Delivery Exceptions** Percent of delivery details with exceptions for the current data set. >= 50% of Total, RED, "High" >= 5% & < 50%, YELLOW, "Medium" • **Holds** Percent of lines with holds. >= 5% of Total, RED, "High" • **Interface Activity** Percent of records with interface activity. >= 5% of Total, RED, "High"

Region	Components
Delivery Exceptions (tag cloud)	Top Ten Delivery Exceptions Tag Cloud Component **Note:** The Delivery Exceptions tag cloud component displays the top ten Delivery Exceptions by frequency of occurrence.
Items (tag cloud)	Top Ten Items Tag Cloud Component **Note:** The Items tag cloud component displays the top ten items by frequency of occurrence.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Fulfillment Progress (tabbed component container)</td><td>Demand (chart)
Demand by Value by Item, Released Status

Sort Options
Customer
Customer by Demand by Value
Dimensions (Value Axis)
Demand by Value
Demand by Quantity
Group Dimensions (Category Axis)
Customer
Item
Carrier
Ship Method
Shipment Priority
Series Dimensions (Color)
(none)
Released Status
Plan Status
Exception Type

Task Exceptions (chart)
Task Count by Task Exception, Task Owner
Sort Options</td></tr>
</table>

Region	Components

	• Task Exception
	    • Task Exception by Task Count
	• Series Dimensions (Color)
	    • (none)
	    • Task Owner
	    • Customer
	    • Item
	    • Carrier
	    • Ship Method
	    • Shipment Priority
	Task Status (chart)
	Time in Hours by Task Status, Task Owner
	• Sort Options
	    • Task Status
	    • Task Status by Time in Hours
	• Dimensions (Value Axis)
	    • Time in Hours
	    • Time in Minutes
	    • Time in Days
	• Series Dimensions (Color)
	    • (none)
	    • Task Owner

Region	Components
	- Customer - Item - Carrier - Ship Method - Shipment Priority Fulfillment Progress (results table) **Note:** The Fulfillment Progress results table component displays the data related to in progress lines and tasks. - Column Sets - Main - Line - Delivery - Tasks - Detail Descriptive Flexfield - Delivery Descriptive Flexfield - View Options - Hide / Show Columns - Sort - Reset table to default - Actions - Print

Region	Components
	- Export - Compare - Links - Details Icon - select the details icon to display record details. - Order Number - link to the Order Details page. - Item - link to the Item Details page.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Delivery Exceptions and Holds (tabbed component container)</td><td>Delivery Exceptions (chart)
Exceptions by Value by Exception Name, Delivery Name

Sort Options
Exception Name
Exception Name by Exception
Dimensions (Value Axis)
Exceptions by Value
Exceptions by Count
Group Dimensions (Category Axis)
Exception Name
Customer
Item
Carrier
Ship Method
Shipment Priority
Released Status
Plan Status
Series Dimensions (Color)
(none)
Delivery Name
Delivery Detail

Holds (chart)</td></tr>
</table>

Region	Components

	Holds by Value by Customer, Delivery Name
	• Sort Options
	  • Customer
	  • Customer by Holds by Value
	• Dimensions (Value Axis)
	  • Holds by Value
	  • Holds by Line Count
	• Group Dimensions (Category Axis)
	  • Customer
	  • Item
	  • Carrier
	  • Ship Method
	  • Shipment Priority
	  • Released Status
	  • Plan Status
	• Series Dimensions (Color)
	  • (none)
	  • Delivery Name
	  • Delivery Detail
	  • Order Number
	  • Line Number
	Delivery Exceptions (results table)

Region	Components

	Note: The Delivery Exceptions results table component displays the data related to in-progress lines.
	
	• Column Sets
	  • Main
	  • Miscellaneous
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	• Links
	  • Delivery Name - link to the Shipping Transactions window where you can plan and manage the trips, stops, deliveries, delivery lines, and LPNs (containers).
	  • Exception Name - link to the View Exceptions window where you can track, review, and update current and past exceptions that have been logged either manually or automatically.
	
	Holds (results table)

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td></td><td>
Note: The Holds results table component displays the data related to in-progress lines.

Column Sets
Main
Miscellaneous
View Options
Hide / Show Columns
Sort
Reset table to default
Actions
Print
Export
Compare
Links
Delivery Name - link to the Shipping Transactions window where you can plan and manage the trips, stops, deliveries, delivery lines, and LPNs (containers).
Order Number - link to the Order Details page.

</td></tr>
</table>

Region	Components

Interface Activity (tabbed component container)	Interface Activity (Chart)
	
	Exceptions by Value by Customer, Delivery Name
	
	• Sort Options
	    • Customer Name
	    • Customer Name by Exceptions by Value
	• Dimensions (Value Axis)
	    • Exceptions by Value
	    • Exceptions by Count
	• Group Dimensions (Category Axis)
	    • Customer
	    • Item
	    • Carrier
	    • Ship Method
	    • Plan Status
	• Series Dimensions (Color)
	    • (none)
	    • Delivery
	    • Delivery Detail ID
	    • Order Number
	    • Line Number
	
	Interface Activity (results table)

Region	Components

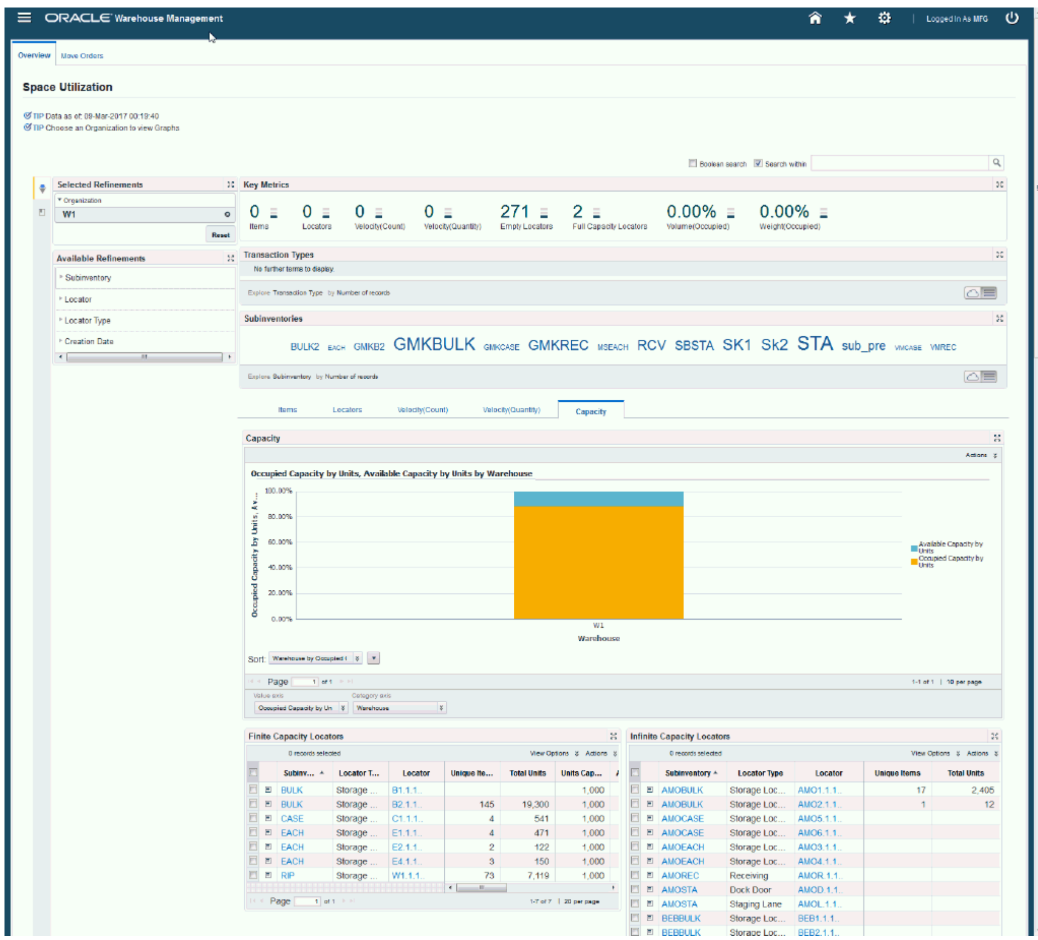
	Note: The Interface Activity results table component displays the data related to in-progress lines and tasks.
	
	• Column Sets
	  • Main
	  • Miscellaneous
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	• Links
	  • Delivery Name - link to the Shipping Transactions window where you can plan and manage trips, stops, deliveries, delivery lines, and LPNs (containers).
	  • Order Number - link to the Order Details page.
	  • Inventory Error - link to the Transaction Interface window where you can view, edit, and correct transactions.

Space Utilization Page

The Space Utilization page lets you track the fragmentation in the warehouse and suggest material movement to manage fragmentation. You can also find velocity mismatch with respect to transaction counts and quantities, view available and occupied capacity, and take appropriate actions to consolidate the material within Inventory. You can view inventory metrics, charts, and results tables. The following displays the Space Utilization page.

From the Warehouse Manager responsibility, navigate to the Space Utilization page:

(N) Inventory Manager > Space Utilization



The following describes the Endeca Warehouse Management Space Utilization page regions and components:

Region	Components
Sub Tabs (page links)	• **Overview** - Select this sub-tab to access the Space Utilization page. • **Generate Move Orders** - Use the Actions menu from the results table to navigate to the Generate Move Orders page. Once you are in the Generate Move Orders page, select the Overview sub-tab to navigate back to the Space Utilization Endeca page.
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Available Refinements</td><td>The Available Refinements component allows you to filter data based on the currently available values or value ranges for selected attributes that are displayed within attribute groups. Expand the following attribute groups to view and select attribute names:

Organization

Note: Graphs and results tables will NOT display data until you select an Organization. You can select only one Organization. Charts and results tables load data when:

The user selects an Organization from Guided Navigation
The user's responsibility has access to one Organization only

Subinventory
Subinventory Type
Locator
Locator Type
Item Status
Item
Transaction Type
Transaction Action
Transaction Source Type
Creation Date
Transaction Date
</td></tr>
</table>

Region	Components
Key Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health.	• **Items** Total number of fragmented items by count >= "N" >= 50, RED, "High Fragmentation" >= 10 & < 50, YELLOW, "Medium Fragmentation" < 10, GREEN, "Low Fragmentation" • **Locators** Total number of fragmented locators by count >= "N" >= 50, RED, "High Fragmentation" >= 10 & < 50, YELLOW, "Medium Fragmentation" < 10, GREEN, "Low Fragmentation" • **Velocity (Count)** Total number mismatch between item & locator velocity by transaction counts. >= 50, RED, "High Mismatch" >= 10 & < 50, YELLOW, "Medium Mismatch" < 10, GREEN, "Low Mismatch" • **Velocity (Quantity)** Total number mismatch between item & locator velocity by quantity counts. >= 50, RED, "High Mismatch" >= 10 & < 50, YELLOW, "Medium Mismatch" < 10, GREEN, "Low Mismatch" • **Empty Locators** Total number of locators without any

Region	Components
	units. >= 50%, GREEN, "High Availability" >= 10% & < 50%, YELLOW, "Medium Availability" < 10%, RED, "Low Availability" • **Full Capacity Locators** Total number of locators where number of units = max number of units. >= 50%, RED, "High Occupancy" >= 10% & < 50%, YELLOW, "Medium Occupancy" < 10%, GREEN, "Low Occupancy" • **Volume (Occupied)** Aggregate occupied volume across finite capacity locators. (locators with defined maximum volume.) >= 50%, RED, "High Occupancy" >= 10% & < 50%, YELLOW, "Medium Occupancy" < 10%, GREEN, "Low Occupancy" • **Weight (Occupied)** Aggregate occupied weight across finite capacity locators (locators with defined maximum weight.) >= 50%, RED, "High Occupancy" >= 10% & < 50%, YELLOW, "Medium Occupancy" < 10%, GREEN, "Low Occupancy"

Region	Components
Transaction Types (tag cloud)	Top Ten Transaction Types Tag Cloud Component **Note:** The Transaction Types tag cloud component displays the top ten Transaction Types by frequency of occurrence.
Subinventories (tag cloud)	Top Ten Subinventories Tag Cloud Component **Note:** The Subinventories tag cloud component displays the top ten Subinventories by frequency of occurrence.

Region	Components

Items (tabbed component container)	Item fragmentation (scaled)
	
	Count by Item, Locator (chart)
	
	Note: This chart displays item fragmentation without highlighting the quantity of each item in a locator. For example, each bar represents the item and each stack represents the locators in which this item exists.
	
	• Sort Options
	    • Item
	    • Item By Count
	• Series Dimensions (Color)
	    • (none)
	    • Locator
	    • Item Status
	    • Material Status
	
	Item fragmentation (non scaled)
	
	Count, Quantity by Item, Locator (chart)
	
	Note: This chart displays item fragmentation and highlights the quantity of each item in a locator. For example, each bar represents the item and each stack represents the quantity of this item in that locator.
	
	• Sort Options
	    • Item
	    • Item by Count

Region	Components

	- Item by Quantity
	- Series Dimensions (Color)
	  - (none)
	  - Locator
	  - Item Status
	  - Material Status
	
	Items (results table)
	
	Note: The Items results table component displays the data related to item fragmentation.
	
	- Column Sets
	  - Main
	  - Locator Descriptive Flexfield
	  - Item Descriptive Flexfield
	  - Subinventory Descriptive Flexfield
	- View Options
	  - Hide / Show Columns
	  - Sort
	  - Reset table to default
	- Actions
	  - Print
	  - Export

Region	Components
	- Compare - Generate Move Order - You can create move orders and assign destination sub/locator and user. - Links - Record Details Icon - select this icon to view record details. - Item - link to the Item Details page. - Item Status - link to the Organization Item window where you can update Organization level item attributes for your current organization. - Locator Status - link to the Stock Locators window where you can view and define locators to identify physical areas where you store inventory items.

Region	Components

Locators (tabbed component container)	Locator fragmentation (scaled)
	Count by Locator, Item (chart)
	Note: This chart displays locator fragmentation without highlighting the quantity of each item in a locator, For Example, each bar represents a locator and each stack represents the items in the locator.
	• Sort Options
	  • Locator
	  • Locator by Count
	• Series Dimensions (Color)
	  • (none)
	  • Item
	  • Item Status
	  • Material Status
	Locator fragmentation (non-scaled)
	Count, Quantity by Locator, Item (chart)
	Note: This chart displays locator fragmentation and highlights the quantity of each item in a locator. For example, each bar represents the locator and each stack represents the quantity of an item in that locator.
	• Sort Options
	  • Locator
	  • Locator by Count

Region	Components

	• Locator by Quantity
	• Series Dimensions (Color)
	  • (none)
	  • Item
	  • Item Status
	  • Material Status
	
	Locators (results table)
	
	Note: The Locators results table component displays the data related to locator fragmentation.
	
	• Columns Sets
	  • Main
	  • Locator Descriptive Flexfield
	  • Item Descriptive Flexfield
	  • Subinventory Descriptive Flexfield
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export

Region	Components
	- Compare - Generate Move Order - You can create move orders and assign destination sub/locator and user. • Links - Record Details Icon - select this icon to view record details. - Locator Status - link to the Stock Locators window where you can view and define locators to identify physical areas where you store inventory items. - Item - link to the Item Details page. - Item Status - link to the Organization Item window where you can update Organization level item attributes for your current organization.

Region	Components

Velocity (Count) (tabbed component container)	Item Velocity (Top 1000)
	
	Count by Item, Locator (chart)
	
	Note: This chart displays item velocity by locator. The metric for the graphs is 'transaction count (sum)'/'transaction quantity (sum).
	
	• Sort Options
	  • Item
	  • Item by Count
	• Series Dimensions (Color)
	  • (none)
	  • Locator
	  • Subinventory
	  • Material Status
	
	Locator Velocity (Top 1000)
	
	Count by Locator, Row (chart)
	
	Note: This chart displays locator velocity. The metric for this graph is 'transaction count (sum)'.
	
	• Sort Options
	  • Locator
	  • Locator by Count
	• Series Dimensions (Color)
	  • (none)

Region	Components

	• Row
	• Rack
	• Subinventory
	• Material Status
	
	Mismatch
	
	Distinct Items by Locator, Item (chart)
	
	Note: This chart displays lot fragmentation and highlights the locators that hold items where item velocity does not match locator velocity.
	
	• Sort Options
	  • Locator
	  • Locator by Distinct Items
	• Group Dimensions (Category Axis)
	  • Locator
	  • Item
	• Series Dimensions (Color)
	  • (none)
	  • Item
	  • Locator
	
	Items (results table)
	
	Note: The Items results table component displays the data related to velocity fragmentation.

Region	Components

	• Column Sets
	  • Main
	  • Locator Descriptive Flexfield
	  • Subinventory Descriptive Flexfield
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	  • Generate Move Order - You can create move orders and assign destination sub/locator and user.
	• Links
	  • Record Details Icon - select this icon to view record details.
	  • Item - link to the Item Details page.
	  • Item Status - link to the Organization Item window where you can update Organization level item attributes for your current organization.
	  • Locator Material Status - link to the Stock Locators window where you can view and define locators to

Region	Components
	identify physical areas where you store inventory items.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Velocity (Quantity) (tabbed component container)</td><td>
Item Velocity (Top 1000)
Quantity by Item, Locator (chart)
Note: This chart displays item velocity by locator. The metric for the graphs is 'transaction count (sum)'/'transaction quantity (sum).

Sort Options
Item
Item by Quantity
Series Dimensions (Color)
(none)
Locator
Subinventory
Material Status

Locator Velocity (Top 1000)
Count by Locator, Row (chart)
Note: This chart displays locator velocity. The metric for this graph is 'transaction count (sum)'.

Sort Options
Locator
Locator by Count
Series Dimensions (Color)
(none)

</td></tr>
</table>

Region	Components
	- Row - Rack - Subinventory - Material Status Mismatch Quantity by Locator, Item (chart) **Note:** This chart displays lot fragmentation and highlights the locators that hold items where item velocity does not match locator velocity. - Sort Options - Locator - Locator by Quantity - Group Dimensions (Category Axis) - Locator - Item - Series Dimensions (Color) (none) - Item - Locator Items (results table) **Note:** The Items results table component displays the data related to velocity fragmentation.

Region	Components

	• Column Sets
	  • Main
	  • Locator Descriptive Flexfield
	  • Subinventory Descriptive Flexfield
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	  • Generate Move Order - You can create move orders and assign destination sub/locator and user.
	• Links
	  • Record Details Icon - select this icon to view record details.
	  • Item - link to the Item Details page.
	  • Item Status - link to the Organization Item window where you can update Organization level item attributes for your current organization.
	  • Locator Material Status - link to the Stock Locators window where you can view and define locators to

Region	Components
	identify physical areas where you store inventory items.

Region	Components

Capacity (tabbed component container)	Capacity
	
	Occupied Capacity by Units, Available Capacity by Units by Warehouse (chart)
	
	Note: This chart displays available and occupied capacity.
	
	• Sort Options
	  • Warehouse
	  • Warehouse by Occupied Capacity by Units
	  • Warehouse by Available Capacity by Units
	• Dimensions (value axis)
	  • Occupied Capacity by Units, Available Capacity by Units
	  • Occupied Capacity by Volume, Available Capacity by Volume
	  • Occupied Capacity by Weight, Available Capacity by Weight
	• Group Dimensions (category axis)
	  • Warehouse
	  • Subinventory
	  • Locator Type
	  • Locator
	
	Finite Capacity Locators (results table)
	
	Note: The Finite Capacity Locators results

Region	Components

	table displays the data related to capacity analysis for locators with finite capacity, corresponding to the selected filter.
	
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	• Links
	  • Record Details Icon - select this icon to view record details.
	  • Subinventory - link to the Material Workbench.
	  • Locator - link to the Material Workbench.
	
	Infinite Capacity Locators (results table)
	
	Note: The Infinite Capacity Locators results table displays the data related to capacity analysis for locators with infinite capacity, corresponding to the selected filter.
	
	• View Options

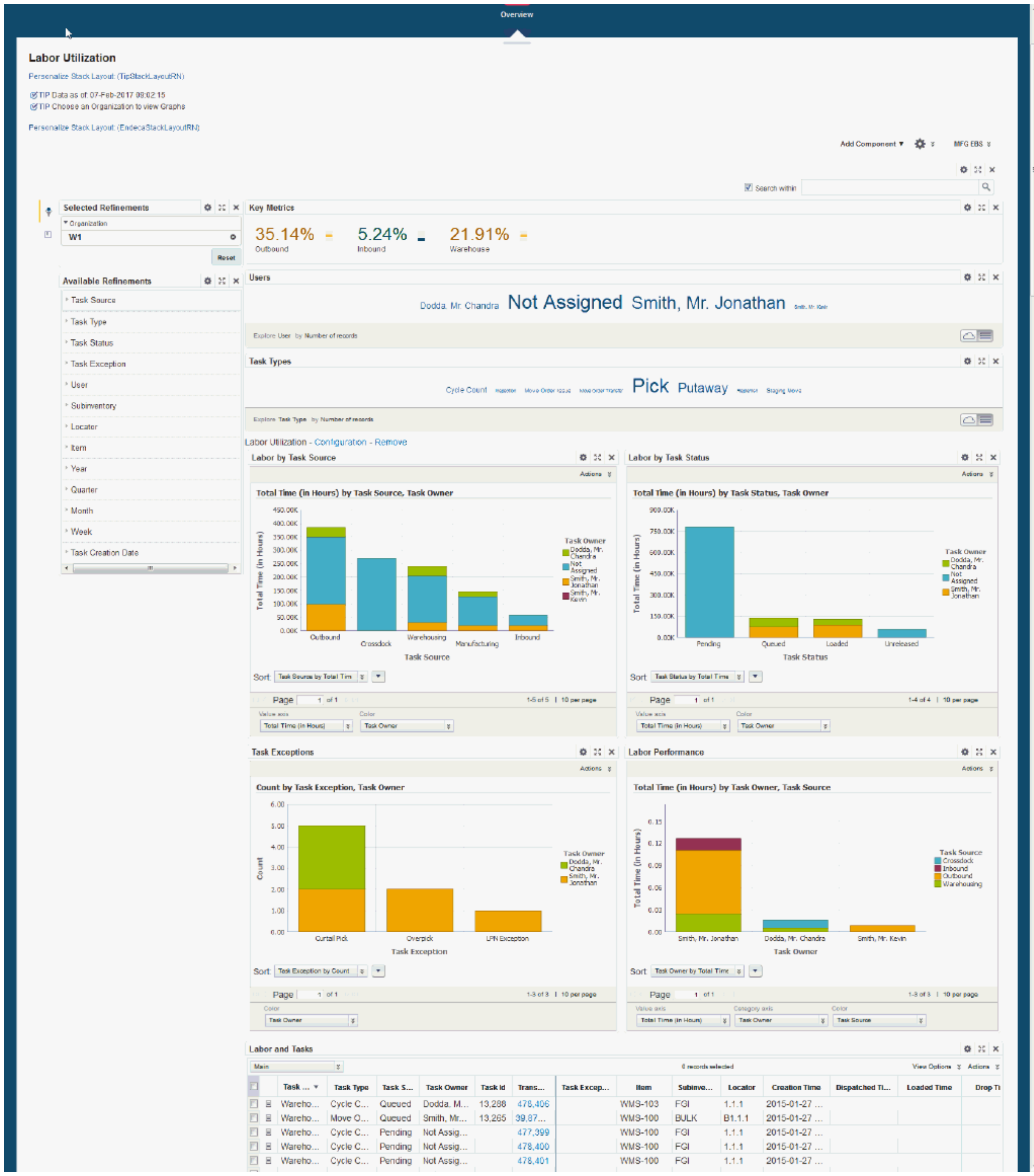
Region	Components
	- Hide / Show Columns - Sort - Reset table to default - Actions - Print - Export - Compare - Links - Record Details Icon - select this icon to view record details. - Subinventory - link to the Material Workbench. - Locator - link to the Material Workbench.

Labor Utilization Page

The Labor Utilization page lets you plan and manage labor in the warehouse. You can view labor metrics, charts, and results tables. The following is a display of the Labor Utilization page.

From the Warehouse Manager responsibility, navigate to the Labor Utilization page:

(N) Labor Management System > Labor Utilization



The following describes the Warehouse Management Labor Utilization page regions and components:

Region	Components
Advanced Search • Boolean Search • Search within	The Advanced Search component includes value search, record search, Boolean search, and partial search capabilities. You can submit keyword searches and the application provides type-ahead suggestions and displays attribute values that match the typed text. When you perform a search, the search term is added to the Selected Refinements component. As you type, you may be prompted to select a matching attribute value, or simply search for the entered text. **Additional Information:** See the *Advanced Search Capabilities* appendix in this guide for details.
Selected Refinements	The Selected Refinements component displays all values that you have selected to filter data, and allows you to quickly make adjustments to the current refinement by removing items or clearing all filters from the list.
Bookmarks	The Bookmarks component allows you to save a given navigation and component state and return to it at a later time.

Region	Components

Available Refinements	You can use the Available Refinements component to filter data using the following attributes:
	• Organization
	Graphs and results tables will NOT display data until you select an Organization. You can select only one Organization. Charts and results tables load data when:
	  • The user selects an Organization from Available Refinements
	  • The user's responsibility has access to one Organization only
	• Task Source
	• Task Type
	• Task Status
	• Task Exception
	• User
	• Subinventory
	• Locator
	• Item
	• Year
	• Quarter
	• Month
	• Week
	• Task Creation Date

Region	Components
Key Metrics (summarization bar) **Note:** The Metric Components are color coded to highlight warnings and health.	• **Outbound** Percent of total time spent on outbound activities. >= 70%, GREEN, "High Outbound" >= 20% & < 70%, YELLOW, "Medium Outbound" < 20%, RED, "Low Outbound" • **Inbound** Percent of total time spent on inbound activities. >= 70%, RED, "High Inbound" >= 20% & < 70%, YELLOW, "Medium Inbound" < 20%, GREEN, "Low Inbound" • **Warehouse** Percent of total time spent on warehousing activities. >= 70%, RED, "High Warehousing" >= 20% & < 70%, YELLOW, "Medium Warehousing" < 20%, GREEN, "Low Warehousing"
Users (tag cloud)	Top Ten Users Tag Cloud Component **Note:** The Users tag cloud component displays the top ten Users by frequency of occurrence.

<table>
<tr><th>Region</th><th>Components</th></tr>
<tr><td>Task Types (tag cloud)</td><td>Top Ten Task Types Tag Cloud Component

Note: The Task Types tag cloud component displays the top ten Task Types by frequency of occurrence.</td></tr>
<tr><td>Labor by Task Source (chart)

Note: This chart displays labor utilization by different task sources. For example, outbound, inbound, warehousing, cross-dock, and manufacturing.</td><td>Total Time (in Hours) by Task Source, Task Owner (chart)

Sort Options
Task Source
Task Source by Total Time (in Hours)
Dimensions (Value Axis)
Total Time (in Hours)
Average Time (in Hours)
Total Time (in Days)
Average Time (in Days)
Total Time (in Minutes)
Average Time (in Minutes)
Series Dimensions (Color)
(none)
Task Owner
Subinventory
Task Status
Task Type
</td></tr>
</table>

Region	Components

Labor by Task Status (chart)
 	
Note: This chart shows labor utilization by in-process task status. For example, pending, queued, dispatched, active, and loaded.
	Total Time (in Hours) by Task Status, Task Owner
	• Sort Options
	  • Task Status
	  • Task Status by Total Time (in Hours)
	• Dimensions (Value Axis)
	  • Total Time (in Hours)
	  • Average Time (in Hours)
	  • Total Time (in Days)
	  • Average Time (in Days)
	  • Total Time (in Minutes)
	  • Average Time (in Minutes)
	• Series Dimensions (Color)
	  • (none)
	  • Task Owner
	  • Task Source
	  • Task Type
	  • Subinventory

Region	Components

Task Exceptions (chart)
 	
Note: This chart displays labor utilization by different task-based exceptions.
	Count by Task Exception, Task Owner
	• Sort Options
	  • Task Exception
	  • Task Exception by Count
	• Series Dimensions (Color)
	  • (none)
	  • Task Owner
	  • Subinventory
	  • Locator
	  • Task Type
	  • Task Source

Region	Components

Labor Performance (chart)
 	
Note: This displays labor performance as measured by the time spent on completed tasks.
	Total Time (in Hours) by Task Owner, Task Source
	• Sort Options
	  • Task Owner
	  • Task Owner by Total Time (in Hours)
	• Dimensions (Value Axis)
	  • Total Time (in Hours)
	  • Average Time (in Hours)
	  • Total Time (in Days)
	  • Average Time (in Days)
	  • Total Time (in Minutes)
	  • Average Time (in Minutes)
	• Group Dimensions (Category Axis)
	  • Task Owner
	  • Year
	  • Quarter
	  • Month
	  • Week
	• Series Dimensions (Color)
	  • (none)
	  • Task Source
	  • Task Type

Region	Components

Labor and Tasks (results table)
 	
Note: The Labor and Tasks results table component displays the data related to warehouse labor and related tasks.
	Labor and Tasks
	• Column Sets
	  • Main
	  • Locator Descriptive Flexfield
	  • Subinventory Descriptive Flexfield
	• View Options
	  • Hide / Show Columns
	  • Sort
	  • Reset table to default
	• Actions
	  • Print
	  • Export
	  • Compare
	• Links
	  • Record Details Icon - select this icon to view record details for the selected row.
	  • Transaction ID - link to the Tasks window to view, plan, and manage warehouse tasks. The link will open the Find Tasks window. This window provides you with the option of filtering tasks before you view them. You can also use the Find Tasks window to save a query, delete an existing query, or access the Manage Tasks window.

Oracle Warehouse Management Information Discovery Plus Product Configuration

Setting Up Oracle Warehouse Management Information Discovery Plus

The Oracle Warehouse Management application configuration and setup must be completed after the installation and common configurations are completed as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Setup and Configuration Steps

To set up Oracle Warehouse Management Information Discovery Plus, you must complete the following steps:

1. Set Access Control, page 30-65 by assigning UMX roles and updating access grants.
2. Load Warehouse Management data, page 30-67 to the Endeca data domain by running graphs provided by Warehouse Management.
3. Schedule Setup, page 30-67 for Full Endeca Refresh.
4. Set Profile Options, page 30-70.

Access Control: Hide and Show EID Dashboards (User Interfaces) for Oracle Warehouse Management

New UMX Roles and a new grant 'WMS Endeca Access Grant' are provided. The 'WMS Endeca Access Grant' is assigned to the Access Roles. In addition, the 'WMS Endeca Access Permission Set' is assigned to the 'WMS Endeca Access Grant'.

As part of the Oracle E-Business Suite-EID integration for the Oracle Warehouse Management application, the following UMX Roles are provided:

UMX Role	Internal Code Name
WMS Plan Fulfillment Endeca Access Role	UMX|WMS_PF_ENDECA_ACCESS_ROLE
WMS Track Fulfillment Endeca Access Role	UMX|WMS_TF_ENDECA_ACCESS_ROLE

UMX Role	Internal Code Name
WMS Space Utilization Endeca Access Role	UMX|WMS_SU_ENDECA_ACCESS_ROLE
WMS Labor Utilization Endeca Access Role	UMX|WMS_LU_ENDECA_ACCESS_ROLE

Permission Set	Internal Code Name
WMS Plan Fulfillment Endeca Access Permission Set	WMS_PF_ENDECA_ACCESS_PS
WMS Track Fulfillment Endeca Access Permission Set	WMS_TF_ENDECA_ACCESS_PS
WMS Space Utilization Endeca Access Permission Set	WMS_SU_ENDECA_ACCESS_PS
WMS Labor Utilization Endeca Access Permission Set	WMS_LU_ENDECA_ACCESS_PS

You must add the new UMX roles to enable Endeca menus for the Warehouse Manager responsibility (or any other custom responsibility which is using the same menu). You must assign the UMX roles to this responsibility. When the UMX roles are assigned to the Warehouse Management responsibility, the Warehouse Management Endeca pages appear.

If you want to use the Endeca-related roles with more than one responsibility, then you must have an additional grant with a security context corresponding to each responsibility. You can add grants for a given role as a separate process instead of while you are adding the role to the responsibility.

Access Grant	Internal Code Name
WMS Plan Fulfillment Endeca Access Grant	WMS_PF_ENDECA_ACCESS_GRANT
WMS Track Fulfillment Endeca Access Grant	WMS_TF_ENDECA_ACCESS_GRANT
WMS Space Utilization Endeca Access Grant	WMS_SU_ENDECA_ACCESS_GRANT
WMS Labor Utilization Endeca Access Grant	WMS_LU_ENDECA_ACCESS_GRANT

Complete the following steps to enable Endeca Menus in Oracle E-Business Suite (EBS):

1. Assign a UMX Role to the Responsibility.

2. Update the WMS Access Grant.

For assigning UMX Roles and Grants, refer to Appendix C in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Loading Warehouse Management Data into the Endeca Data Domain

Clover ETL within Endeca queries WMS Views and does a full data load to the WMS data domain in Endeca. After the first data load, full data load or incremental data load can be performed periodically. Incremental data load will update all the records in the Endeca WMS data domain which were updated in EBS after the last load. After the data has been loaded in the WMS data domain, it can be queried and shown in the WMS pages.

Warehouse Management Data Sources in the WMS Data domain

Data sources are defined in the WMS data domain in Endeca and are used to query data for different pages in WMS. These data sources include:

Restricting Data Loaded Into the Endeca Data domain Based on Organizations and Subinventories

The lookup 'Organization Control For WMS and INV Endeca Extensions' restricts data being loaded to the Endeca data domain based on Organization in the Plan Fulfillment, Track Fulfillment, Space Utilization, and Labor Utilization pages. The lookup is seeded with 'ALL' as the default lookup code to load data for all Inventory Organizations. If there is a requirement not to load data for all Inventory Organizations, then disable the default lookup code 'ALL and add the lookup code value 'Organization Code'.

The lookup 'Subinventory Control For WMS and INV Endeca Extensions' restricts data being loaded to the Endeca data domain based on Subinventories in the Space Utilization page. The lookup is seeded with 'ALL' as the default lookup code to load data for all Subinventories. If there is a requirement not to load data for all Subinventories, then disable the default lookup code 'ALL' and add the lookup code value 'Organization Code' or 'Subinventory Code'.

Setting Up the Scheduler for Endeca Full Refresh

The initial data upload for Endeca Search is complete when the Full graph is run as described in *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1). Full refresh deletes all data from Endeca and repopulates it with a full data extract from the E-Business Suite system. For incremental refresh, you should determine how often the Endeca data should be refreshed from E-Business Suite depending on your organizational requirements.

To schedule ETL on the Integrator Server:

1. Login to Integrator server using your Clover login.
2. Click the Scheduling tab.
3. Select the New Schedule link.
4. Enter a Description for the scheduler.
5. Select Periodic as the Type.
6. Select by interval as the Periodicity.
7. Enter a start date and time in the Not active before date/time field.
8. Enter an end date and time in the Not active after date/time field.
9. Enter a value in the Interval (minutes) field.
10. Ensure you select the Fire misfired event as soon as possible check box.
11. Select Start a graph from the Task Type list.
12. Select the graph for schedule to run. I.e. Full.grf/incremental.grf.
13. Click Create to set the scheduler.

ETL Parameters for Warehouse Management

You can load data to the Warehouse Management (WMS) data domain by running graphs provided by WMS. There are four data domains for WMS:

- inv-pf - Plan Fulfillment page data domain from underlying 'wms-pf' data source
- inv-tf - Track Fulfillment page data domain from underlying 'wms-tf' data source
- inv-su - Space Utilization page data domain from underlying 'wms-su' data source
- nv-lu - Labor Utilization page data domain from underlying 'wms-lu' data source

There are four ETL sandboxes shared between Inventory and WMS. Each file contains Full load and Incremental graphs specific to the data domains 'FullLoadConfig.grf' (Full Load) and 'IncrLoadConfig.grf' (Incremental Load). ETL Sandboxes include:

- invpfetl.zip
- invtfetl.zip

- invsuetl.zip
- invluetl.zip

To load data to the WMS data domain:

1. Using the URL for the EID Integrator Server, navigate to the Sandboxes page and expand the graph node under WMS.
2. Graphs to load data include:
   - **FullLoadConfig.grf:** Run the FullLoadConfig graph to perform a full data load.

     Note: If you are loading data for the first time, then run FullLoadConfig.grf only. You can run other graphs according to your requirements. Run incremental graphs periodically. You can set up this graph from the Scheduling tab.

     FullLoadConfig.grf contains the following parameters:

     - MAX_AGE_OF_ORDERS_PF: Number of Days Old, based on Order Creation Date (For Example: If the Plan Fulfillment page should show only Sales Orders created in the last 90 days, then you should specify MAX_AGE_OF_ORDERS_PF = 90).
     - MAX_AGE_OF_ORDERS_TF: Number of Days Old, based on Order Creation Date.
     - MAX_AGE_OF_ONHAND: Number of Days Old, based on On-hand Creation Date.
     - MAX_AGE_OF_INV_TRANSACTIONS: Number of Days Old, based on Transaction Creation Date.
     - MAX_AGE_OF_TASKS: Number of Days Old, based on Task Creation Date.

       Note: The above parameters must be modified one time in the workspace.prm file under the following sanboxes on the ETL Server:

       - inv-pf - MAX_AGE_OF_ORDERS_PF
       - inv-tf - MAX_AGE_OF_ORDERS_TF
       - inv-su - MAX_AGE_OF_ONHAND and

MAX_AGE_OF_INV_TRANSACTIONS

- inv-lu - MAX_AGE_OF_TASKS

- **IncrLoadConfigTF.grf**: Run the IncrLoadConfigTF incremental graph to load the incremental Track Fulfillment data.
- **IncrLoadConfigPF.grf**: Run the IncrLoadConfigPF incremental graph to load the incremental Plan Fulfillment data.
- **IncrLoadConfigSU.grf**: Run the IncrLoadConfigSU incremental graph to load the incremental Space Utilization data.
- **IncrLoadConfigLU.grf**: Run the IncrLoadConfigLU incremental graph to load the incremental Labor Utilization data.

Note: If you are loading data for the first time, then run FullLoadConfig.grf only. You can run other graphs according to your requirements. Run Incremental. graphs periodically. You can set up these graphs from the Scheduling tab.

Profile Options for Warehouse Management

You must set the following profile option:

Profile Option Name	Description
INV: Endeca Display Currency	This profile value determines the currency in which all amounts and values are displayed in the Plan Fulfillment and Track Fulfillment pages. This is a site level profile option.

Views and Joins for Warehouse Management

The following views are used by the ETL layer in Endeca to load WMS data to the Endeca data domain:

View Name	Purpose
INV_EID_UNPICKED_DETAILS_V	Data loaded from this view into "inv-pf" Endeca data domain is displayed in the Plan Fulfillment page.
INV_EID_RESERVATIONS_V	Data loaded from this view into "inv-pf" Endeca data domain is displayed the Plan Fulfillment page.
INV_EID_PICKED_DETAILS_V	Data loaded from this view into "inv-tf" Endeca data domain is displayed in the Track Fulfillment page.
INV_EID_ONHAND_DETAILS_V	Data loaded from this view into "inv-su" Endeca data domain is displayed in the Space Utilization page.
INV_EID_MTL_TRANSACTIONS_V	Data loaded from this view into "inv-su" Endeca data domain is displayed in the Space Utilization page.
INV_EID_TASKS_V	Data loaded from this view into "inv-lu" Endeca data domain is displayed in the Labor Utilization page.
INV_EID_LOCATORS_V	Data loaded from this view into "inv-su" Endeca data domain is displayed in the Space Utilization page.

Menus for Endeca Warehouse Management

Endeca Warehouse Management integration includes the following user menu functions:

User Function Name	Function Name
WMS Endeca Plan Fulfillment	WMS_PLAN_FULFILLMENT
WMS Endeca Track Fulfillment	WMS_TRACK_FULFILLMENT
WMS Endeca Space Utilization	WMS_SPACE_UTILIZATION

User Function Name	Function Name
WMS Endeca Labor Utilization	WMS_LABOR_UTILIZATION

A

Descriptive Flexfield (DFF) Search

This appendix covers the following topics:

- Overview
- Product Descriptive Flexfields

Overview

Descriptive Flexfields (DFF) provide customizable expansion space on the EBS Endeca user interfaces and are used to track additional information important and unique to the business that would not otherwise be captured. Oracle E-Business Suite Information Discovery supports Descriptive Flex Field (DFF) information and enables you to search on DFF attributes.

When a new descriptive flexfield definition has been created, the descriptive flexfield details will be available after the ETL processes complete. DFF support is available by default within the guided navigation component, and you can refine each of the attributes with specific search and selection criteria. You can also search on results tables, charts, and other components by customizing and configuring the application.

> **Note:** For additional information on configuring and customizing flexfields, see the *Oracle E-Business Suite Flexfields Guide* and *Installing Oracle E-Business Suite Information Discovery, Release 12.2 V8* (Doc ID: 2214431.1).

Product Descriptive Flexfields

Descriptive Flexfields that are included with Oracle E-Business Suite Information Discovery and supported by individual product extensions include the following:

Product Name	Community Name	Sandbox Name	DFF Title in EBS	DFF Name in FND_EID Table
Field Service Tasks	csf-tasks	csf-tasks	Tasks Additional Information	JTF_TASKS_B
Field Service Parts	csf-parts	csf-parts	Tasks Additional Information	JTF_TASKS_B
Oracle Enterprise Asset Manager	Eam	eam	Operation Information Operation Resources Discrete Job Work Request Information	OPERATIONS OPERATION_RESOURCES WIP_DISCRETE_JOBS WIP_EAM_WORK_REQUESTS
Installed Base	Csi	csi	Item Instance Flexfield Details	Item Instance Flex Field
Warehouse Management System, Inventory	inv-pf	wms	Additional Header Information Additional Line Attribute Information Additional Delivery Detail Information	OE_HEADER_ATTRIBUTES OE_LINE_ATTRIBUTES WSH_DELIVERY_DETAILS
	inv-tf		Additional Delivery Detail Information Additional Delivery Information	WSH_DELIVERY_DETAILS WSH_NEW_DELIVERIES
	inv-su		Stock locators Subinventories	MTL_ITEM_LOCATIONS MTL_SECONDARY_INVENTORIES
	inv-lu		Stock locators Subinventories	MTL_ITEM_LOCATIONS MTL_SECONDARY_INVENTORIES

Product Name	Community Name	Sandbox Name	DFF Title in EBS	DFF Name in FND_EID Table
Inventory Management Extension	inv-item	inv-item	Items	MTL_SYSTEM_ITEMS
Projects	prj-pjt	prj-pjt	Projects Workplan Descriptive Flex	PA_PROJECTS_DESC_FLEX PA_PROJ_ELEM_VER_SCH_DESC_FLEX
Manufacturing Execution System for Discrete Manufacturing	wip-dwo	wip-dwo	Serial Numbers Serial Attributes Operation Information Discrete Job Shop Floor Status	MTL_SERIAL_NUMBERS Serial Attributes OPERATIONS WIP_DISCRETE_JOBS WIP_SHOP_FLOOR_STATUS_CODES
Channel Revenue Management	ozf-claim	ozf-claim	Claims	AMS_CLAIM
Channel Revenue Management	ozf-budget	ozf-budget	Budgets	AMS_FUND
Order Management	ont	ont	Additional Line Attribute Information	OE_LINE_ATTRIBUTES
Depot Repair - Supplier Warranty	csd	supwar	Additional Information Repair Orders	CS_INCIDENTS_ALL_B_EXT CSD_REPAIRS

Product Name	Community Name	Sandbox Name	DFF Title in EBS	DFF Name in FND_EID Table
Process Manufacturing	gmo-batch	gmo-batch	Detail Information Batch Information Batch Steps Information Batch Steps Activity Information Batch Steps Resource Information	BATCH_DTL_FLEX Batch Information BATCH_STEPS_DTL_FLEX GME_BATCH_STEP_ACTIVITIES_FLEX GME_BATCH_STEP_RESOURCES_FLEX
Cost Management - Landed Cost Management	inl-lc	inl-lc	Shipment Headers Shipment Lines	INL_SHIP_HEADERS INL_SHIP_LINES
Receivables	ar	ar	Receipt Information Transaction Information	AR_CASH_RECEIPTS RA_CUSTOMER_TRX
Payables	ap	ap	Invoice	AP_INVOICES
Service Contracts	oks	oks	Contract Headers Contract Lines	OKC_HEADERS_DESC_FLEX OKC_LINES_DESC_FLEX
TeleService	service endeca	service endeca	Additional Information for Agents Additional Information	CS_INCIDENTS_ALL_B CS_INCIDENTS_ALL_B_EXT

B

EBS Custom Components

This appendix covers the following topics:

- EBS Results Grid
- EBS Quick Links
- EBS Global Searchbox
- EBS Multi-view Available Refinements and Selected Refinements
- Summarization Bar Metric Refinement

EBS Results Grid

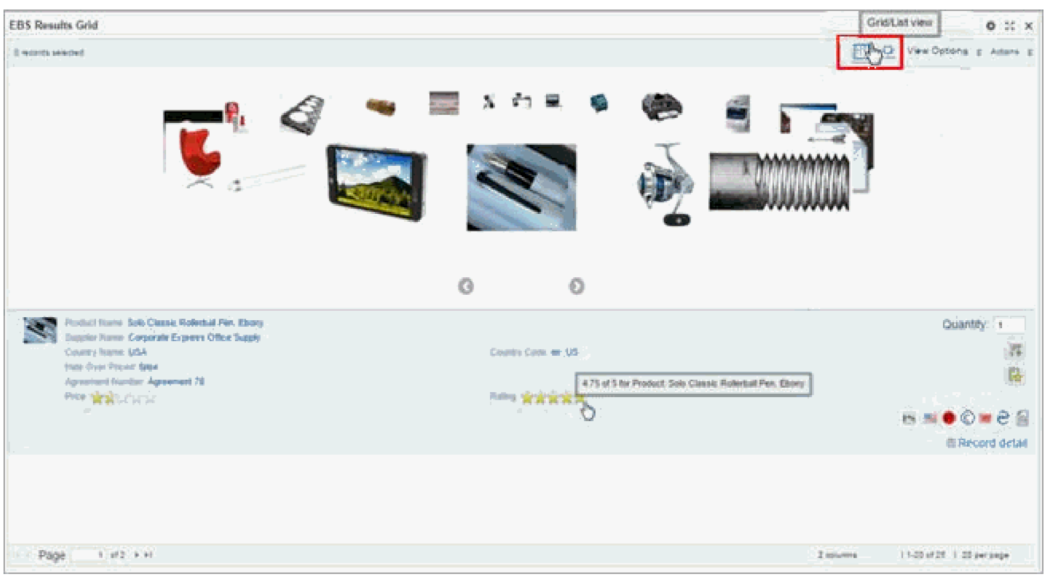
About EBS Results Grid

EBS Results grid component provides visual representation of record attributes. It can display single and multi line attribute values effectively.

EBS Results Grid supports a flexible UI design that allows users to toggle between grid and carousel view to check item details and control item image and positioning.

Using the EBS Results Grid

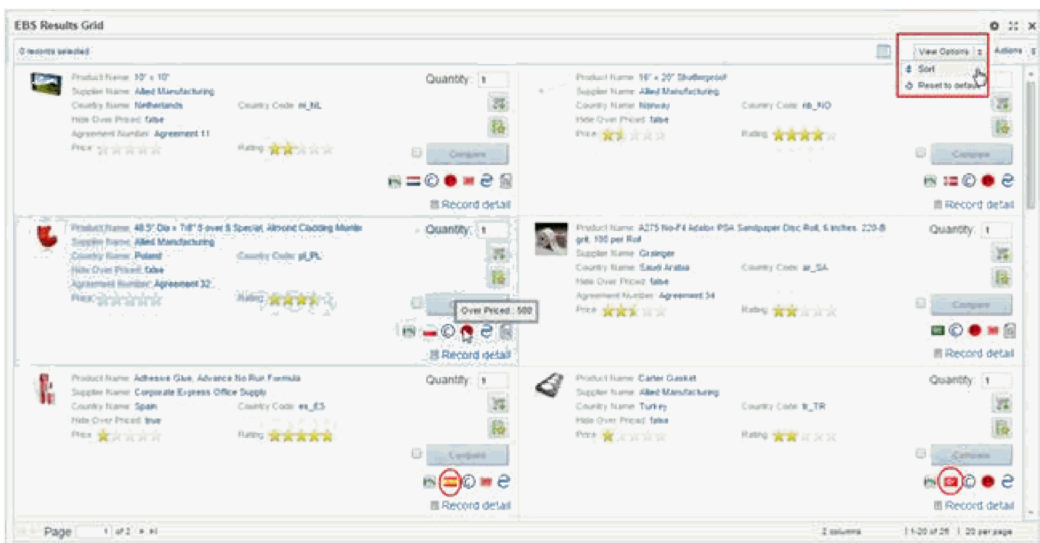
EBS results grid supports two types of views of the content based on how it is configured. The first view is the grid layout with flexibility on how many items to display per row and per column. The second option is to display the items in circular carousel view. Also users can toggle between the grid and carousel view.



For carousel view, users can move onwards or backwards among the displayed items using the right and left arrows.

For grid view, users can use columns menu to change the number of columns to display.

View option menu enables users to sort the displayed attributes using the sort option based on the data selection view configured to the EBS Results Grid.



Users are able to add several sorting rules according to the maximum configured in the component.

The sorting rule includes selecting the sorting attribute and the order rule applied on the sorting attribute value: Ascending/Descending.

To change back to the default display, from the View Options menu, select Reset to default.

The displayed attributes in the list template can be links to refine the data, display record details, or navigate to a URL based on each attribute configuration.

Each record can also have a separate link to display the Record Details dialog with the details for that record.

From the Actions menu, you may be able to print and export the results. You may also be able to select records in order to compare them using the Compare dialog.

Users can use add to cart action button upon comparing items.

Users can use the Page pagination on the Grid view to change the displayed EBS results grid pages.

If configured, user can also have:

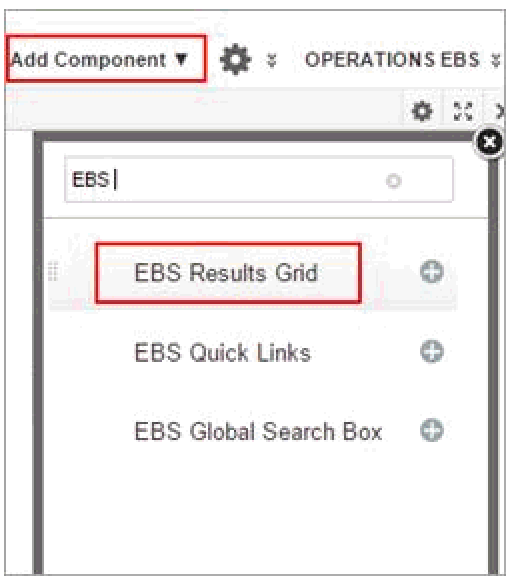
- Several buttons to perform EBS actions, such as: Add to cart and Add to favorites in iProcurement
- Indicator icons
- Star ratings

Configuration

1. Log in to Oracle Endeca Information Discovery Studio as an Admin user.

   The EBS Result Grid is available from the Information Discovery section in the Add Components menu.

2. Click Add the component and Drag and drop the component on the page.

3. When you first add a Results List component to a page it includes five attributes. The identifying attributes from the first base view, plus up to four additional attributes.

The attributes are each displayed in a separate row. The identifying attributes are displayed at the top, and in a slightly larger, bold font.

4. To configure the component, click the options icon.

5. In Data Selection section, Select the relevant base/custom view

6. Navigate to List Template; drag and drop the required attributes to be displayed in the EBS Results Grid per every record. Each row can contain values for up to 3 attributes. To remove an attribute from the template, click its delete icon.

7. Optionally, click Edit to configure the following per required attribute:

   - Enable Display attribute name checkbox

   - Enter Conditional attribute to hide the display name

   - To preserve any line breaks and white space in the attribute value, check the Preserve white space and line breaks checkbox. The box is checked by default.

     This option is useful for longer text values that may include some HTML formatting. Except for the white space and line breaks, all HTML code is stripped from the attribute value.

   - Under Truncation, to determine how longer values will be truncated:

     To display the value up to a specific number of lines of text, click the Display up to radio button. In the field, type the number of lines to display.

     To display the full text of the value, up to the maximum allowed, click the Show full record text radio button.

   - Expand the Display Options sub menu and edit the default text style and alignment.

     For a multi-value attribute, whether to display the values in rows or as a single, comma-separated String.

   - If the attribute has formatting options, then use the Value Formatting section to configure the format. For multi-value attributes, the Multi-Value Formatting section allows you to configure the number of values and the delimiter.

8. Optionally, Open the drop-down action menu to enable one of the following actions to be taken by the attribute:

   - Refinement Action

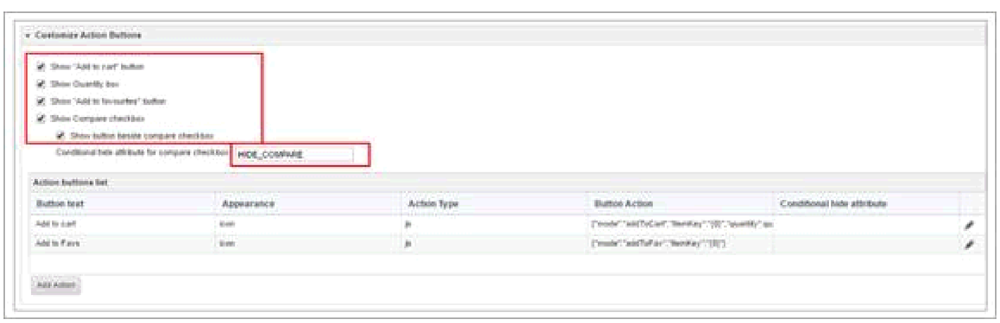
   - Hyperlink Action

     - Enable Display action description in tooltip checkbox

- Edit the Action Description
- Enable Open link in a new window checkbox
- Enter the conditional attribute key to open in URL in new window
- Enter URL name
- Click Add URL Parameters button
- Select the required attribute
- Click Apply
- Click Save

Customize Action Buttons Configuration

1. Under the same List Template configuration menu, scroll down to the (Customize Action Button) menu and enable the following:
   - Check Show Add to Cart button if you want the Add to Cart button to be displayed.
   - Check Show the Quantity box if you want the user to see the quantity box.
   - Check Show "Add to Favorites" button if you want the Add to Favorites button to be displayed.
   - Check Show Compare checkbox to allow the end user to compare multiple records.
   - To hide the Compare checkbox conditionally, enter the attribute based on which to hide the checkbox.

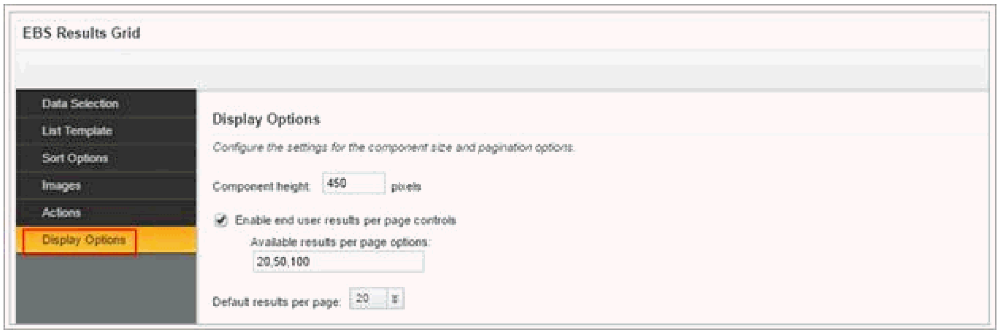


2. Edit the Add to cart button.

- Click the update icon for the Add to Cart button.
- Set the action button properties for the Add to cart button.
  - Enter the action button name in Button Text
  - Select the Appearance option
  - Click Select Image button for choosing the Default image of the action button
    - In case the display option is Icon/Combined
  - Select/Browse the action button image
  - Enter conditional hide attribute key
  - Select the action Type taken by the button either to open URL or run JavaScript
  - Enter URL details in Button Action field
  - Click Add Parameter to be passed to URL
  - Enter required attribute key. Click OK.
  - Click Save
  - Click Save to whole component

Display Options Configuration

1. Navigate to Display Options menu



2. Check the Enable end user results per page controls checkbox. The box is checked by default. And allow end users to select the number of records to display per page.

3. In the Available results per page options field, type a comma-separated list of available values for the number of results to display per page.

4. By default, the available options are 10, 20, and 30 records per page.

5. From the Default results per page dropdown list, select the default number of records to display per page.

Grid View Options Configuration

1. To enable the grid view option, check Enable Grid check box

2. To allow users to select the number of records to change, enable Allow number of columns to be changed checkbox

3. In the Available Number of columns options field, type a comma-separated list of available values for the number of columns to change.

4. From the Default results per page dropdown list, select the default number of records to change.

5. In the Grid Border size field, enter a value for the size of borders separating the grid cells.

6. In the Grid Border color field, specify the color of the grid borders. Alter the default grey color of the grid columns' border by entering new border color code, such as:

   - #FF0000 = Red, or
   - #00FF00 = Green, or
   - #0000FF = Blue

The Carousel Options Configuration

1. To enable the carousel view option, check Enable Carousel view checkbox

2. To enable the carousel as the default view for the component, check Show Carousel

by default.

3. To allow the user to see the images tooltip, check Show tool tips on images.

4. In the Attribute to show as Tooltip title field, enter the tooltip title.

5. In the Attribute to show in Tooltip field, enter the tooltip description.

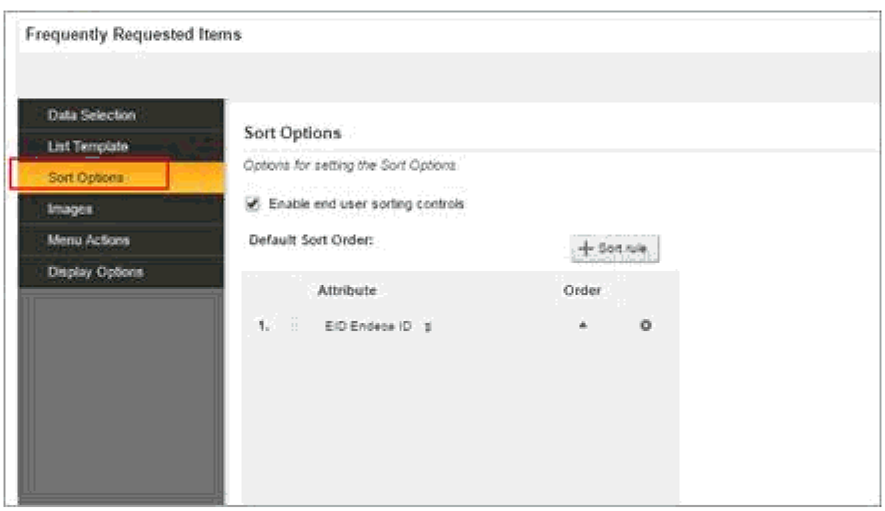
6. Check Resize images to allow end users to resize the images.

7. Select either Fixed width or fixed height for the image size, and specify the appropriate value.

8. Click Save

Configuring the sorting options

Navigate to the (Sort Options) menu.



You can configure whether end users can change the sort order for the list.

1. By default, end users can change the sort order, and the Enable end user sorting

controls checkbox is checked.

To not allow end users to control the sort order, uncheck the checkbox.

2. To configure the default sort order:
   - To add a new sort rule, click the +Sort rule button.
   - To change the attribute assigned to a sort rule, in the Attribute column, click the drop-down arrow next to the attribute name, then select the new column.
   - You can only sort using attributes that are displayed on the component.
   - To change the sort direction for a sort rule, in the Order column, click the sort direction toggle.
   - To change the order in which to apply the sort rules, drag each sort rule to the appropriate location in the list.
   - To remove a sort rule, click its delete icon.

Images Configuration

Navigate to Images menu to configure the image to display next to each record.

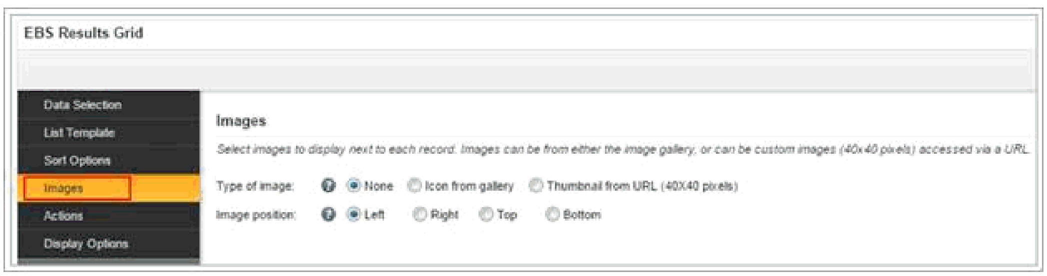


Image sources can be:

Image Type	Description
Icons selected from Studio's image gallery	Studio provides a basic set of icon images. If you use this option, you can assign one of these images to each value of a selected attribute. The icon images provided by Studio include: • Document images with different colors • File type images • Sentiment images • Social media images This option is typically used when the icons represent a category or other high-level classification of the records. You can also upload your own images to use as icons on the EBS Results Grid. Studio supports the .gif, .jpeg/.jpg, .bmp, and .png file types. When you upload images, they become available to use for any EBS Results Grid component in the same application.
Images from a URL that you provide	If you select this option, then you provide the URL for the image. The URL can include a token to represent the value of a selected attribute. This is typically used when most of the records in the system have associated images published to a Web or application server (for example, a unique preview image for products represented by each record).

1. To not display an image next to each record, under Type of image, click the None radio button. This is the default configuration.

2. To display an icon from a set provided by Studio for each value of a selected attribute:

   - Under Type of image, click the Icon from gallery radio button.

   - To select the attribute to use, click the Select Attribute button. Click the attribute you want to use, and then click Apply.

The attribute selection dialog displays the attributes that can be used for the image selection. The attribute must have fewer than 15 values, and must be displayed on the component.

For a hierarchical attribute, only the top level of values is displayed. On the end user view, records use the image for the top level value.

For example, for a Wine Type attribute, the top level values might be Red, White, and Sparkling. If a record has a Wine Type value of Merlot (Red --> Merlot), that record would use the image selected for the Red value.

- For each attribute value, to select the image to use, click the Select button.

- On the Select Image dialog, click the image you want to use.

  To never display an image for a value, click the No Image option.

- To upload your own image, click the Browse button to search for and select the image. After selecting the file, click Upload.

  The uploaded image is added to a new My Images category on the Select Image dialog.

  If the image is too large, Studio crops it.

- Click OK.

  The list is updated with the selected image.

- To clear a selected image, and display the default image for that attribute value, click the delete icon.

- To select a different image for an attribute value, click the edit icon.

3. To display images from a URL:

   - Under Type of image, click the Thumbnail from URL radio button.

   - In the field, type the URL for the image file.

   - To add attribute values as parameters in the URL, click Add URL Parameters.

   - On the add parameters dialog, in the attribute list, click the add icon next to each attribute to add. For each attribute you select, the add icon changes to a delete icon.

     To not include a selected attribute in the URL parameters to add, click the delete icon.

   - When you are finished selecting attributes, click Apply.

The selected attributes are displayed in a table, with each attribute assigned an ID to use when inserting the attribute into the URL.

The attributes are also inserted as query parameters, where the parameter name is the attribute key, and the parameter value is {IDNumber}, where IDNumber is the ID for that attribute. For example: http://www.acme.com/index.htm?Designation={0}

By default, the value is encoded. To not encode the value, change the format to {{IDNumber}}. For example: {{0}}. you can also use the ID numbers to insert the attribute values manually.

- To remove a URL parameter from the table, click its delete icon.

  If you did not edit the inserted query parameter, then Studio also removes it from the URL.

  If you did edit the inserted query parameter, then you must remove the parameter from the URL manually. If you inserted the attribute value manually, then you also must remove it manually.

4. Default image to display if selected image is not available:

   The default image setting determines the default image to display if Studio can't find the configured image, or, for icons, if you selected the No Image option for a value. You can also use this setting if you want to display the same image for all of the records.

   To not display a default image, click the None radio button.

   To select a default image, click the other radio button, then click the Change Icon button.

   On the Select Image dialog, click the image you want to use, and then click OK.

Enabling the Record Details link and Actions menu actions

Users can disable or enable the Record Details link that displays for each record. You can also configure the Actions menu for the component.

On the Actions tab of the Results List edit view, if the Enable Record Details action checkbox is checked, then on the end user view, the Record detail link is displayed next to each record. For the Record Details action, you can configure the title to display on the Record Details dialog.

From the Actions tab, you can also control the available options in the Actions menu. In addition to the Print, Export, and Compare options, you can add Refinement options, to refine by attribute values from selected records.

Indicator Icons Configuration

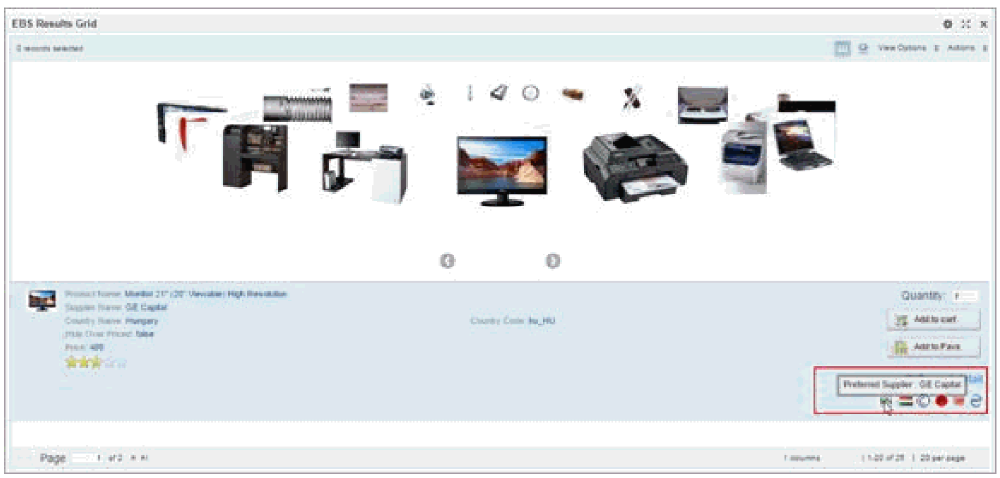
1. EBS Results Grid portlet support multiple number of indicator icons per each item.

2. Indicator Icons display several item statuses that differ from one Information Discovery application to another, in a graphical UI, such as:

   - (iProcurement application)
     - Over-Priced Items
     - Preferred Suppliers
     - MBE Suppliers
   - (HR application)
     - Male candidate
     - Female Candidate

3. A grid view with multiple indicator icons appears as follows:

4. A carousel view with multiple indicator icons appears as follows:



5. (N) Add Component > EBS Result List > Configuration Options > List Template > Customize Indicator Icons > Click on (B) Add Indicator Icon button

6. Tooltip text

   Indicator Icon's tooltip text support both static description and dynamic single attribute value

- Static Tooltip:
    - Insert required hard description
    - Such as, Preferred Supplier
- Dynamic Tooltip text:
    - We support a single attribute key name
    - Insert the attribute key name between double curly brackets added to the static tooltip text
    - Such as, Preferred Supplier : {SUPPLIER_NAME}

7. Conditional Hide Attribute
    - Displaying the indicator icons is the default behavior
    - Conditional icons hide per each item is supported
    - ETL a conditional hide attribute into the data domain with (false and true) values per items
    - false: will display the indicator icon
    - true: will hide the indicator icon
    - Insert this attribute in the (F) Conditional hide attribute field

      Such as, Hide_Preferred_Supplier

8. URL
    - Indicator icon URL support both static and multi dynamic image names
    - Insert icons' images URL name combined with the image name
    - Static Image Name /OA_MEDIA/indicator/PS_16.png
        - /OA_MEDIA/indicator/ : is the Indicator Icons images folder path
        - PS_16.png : is the static image name saved in the above image folder
    - Dynamic Image Name /OA_MEDIA/indicator/{Country_Code}.png
        - /OA_MEDIA/indicator/: is the Indicator Icons images folder path

- /{Country_Code}.png: the image name saved in the folder with the country code attribute key values in the data domain per each item

- Multiple tokenized attributes are supported for the image name URL with special naming conventions. Such as, /OA_MEDIA/indicator/{Country_Code}-{Country_Name}.png
- All images should be transparent (without white backgrounds)
- All icon images should maintain a consistent size
- Recommended thumbnail icon images (24*24) or lower
- Uploaded Images should all share same (.png), (.jpg) or (.JPG)
- Uploaded Images names should be without space characters

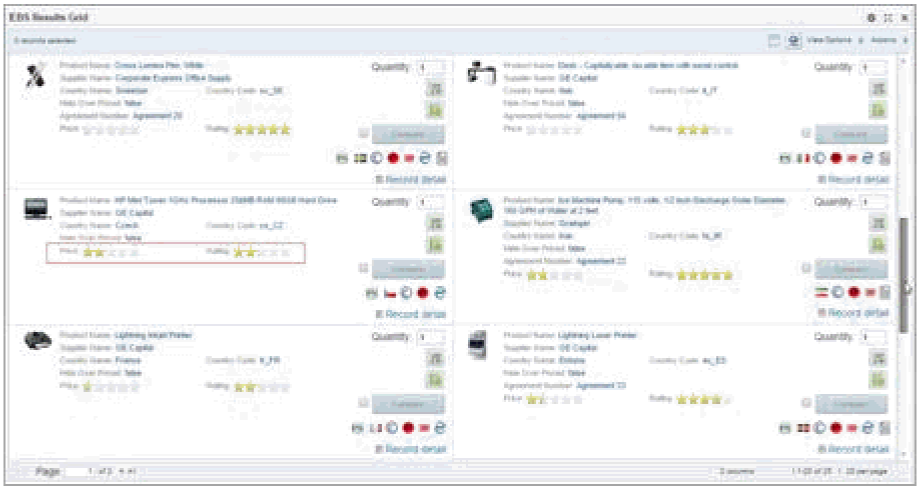
9. Alignment
   - (Left or Right) indicator icons' alignments are supported
   - Right is the default alignment
10. Position relative to record details
    - (Above or below) indicator icons' position relative to the (record details) are supported
    - Below is the default position
11. Reorder icons on UI

    Indicator icons (up or down) reordering on UI is supported
12. Click Save button

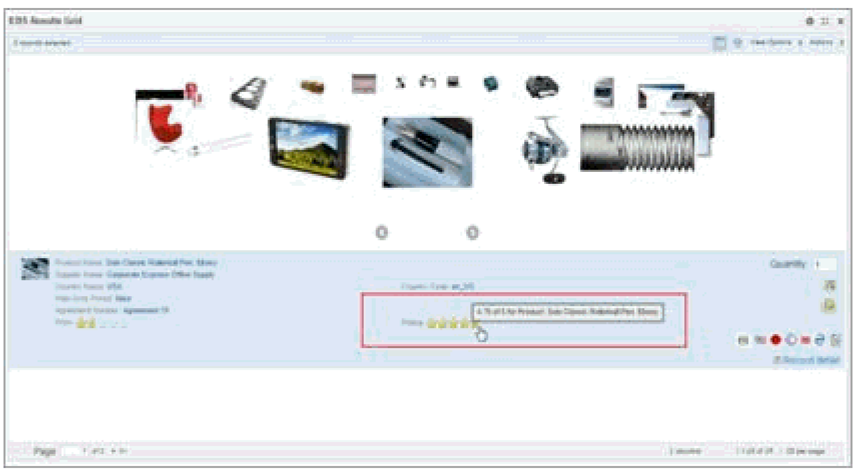
Star Rating Configuration

1. EBS Results Grid items support multiple items stars rating.
2. Star Rating provide a quick well known UI stars rating review status, such as: pricing reviews, quality reviews, etc
3. Values of any metric list template attribute can be presented in terms of stars based on its range values
4. Refinable and/or hyperlink stars are supported

5. Stars Rating display on grid view as follows:



6. Stars Rating display on carousel view as follows



7. (N) Add Component > EBS Result List > Configuration Options > List Template

   - Add the required attribute into the list template

   - Click (B) Edit button

   - Display attribute name:

     - Optionally, Enable the display attribute name checkbox to differentiate the stars' attribute name

   - Expand (Star Rating Options) menu

- (Enable star rating) checkbox = Yes

  Note: Once the attribute is enabled as a star, the (Display Options) menu for configuring text value attributes is disabled

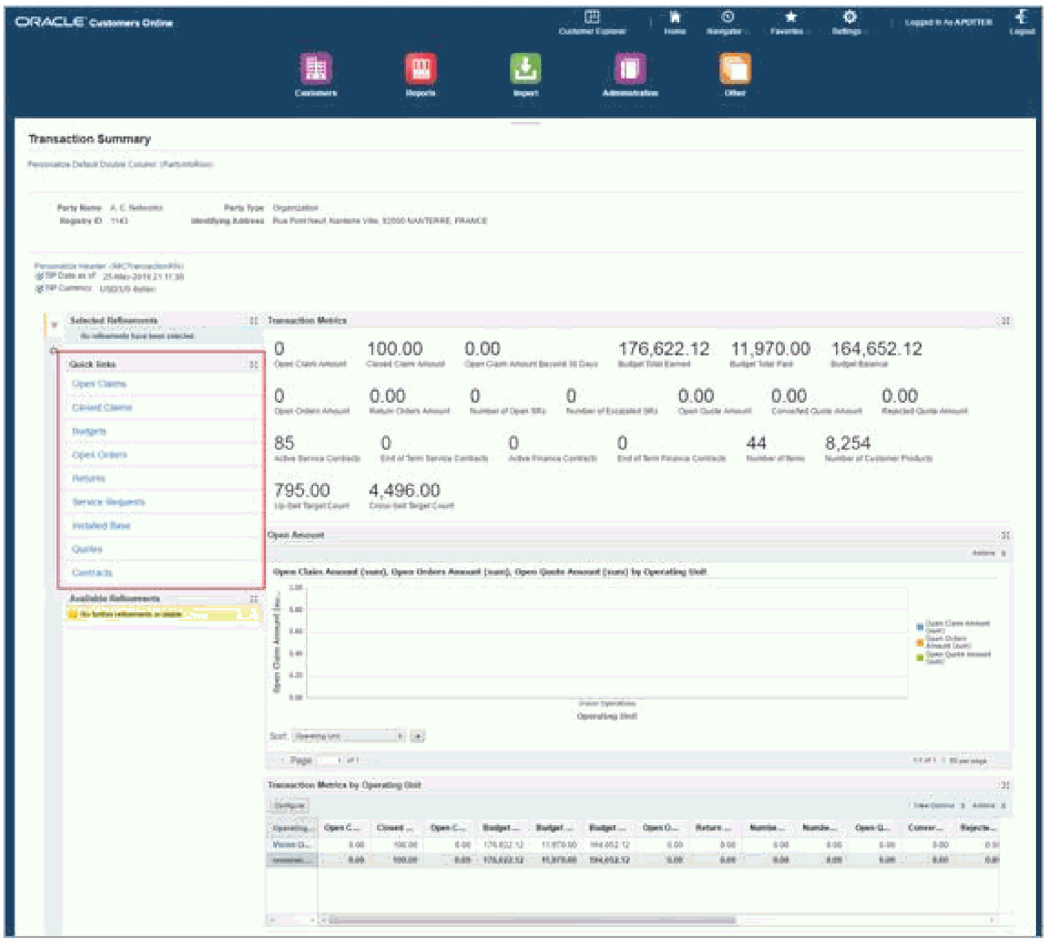
8. Tooltip
   - Stars tooltip support a mixed static description and/or multiple dynamic attribute values
   - Such as, Rating = {RATING} of 5 for Product: {PRODUCT_NAME}
     - Static descriptions : Rating =
     - Multiple dynamic attributes : {RATING} , {PRODUCT_NAME}
   - Star Rating Factoring
9. Star rating support default (0) Minimum & (5) maximum range attribute values
10. Wider value range attributes are supported by stars rating factored (Mimimum) and (Maximum) attribute configuration fields
11. Such as, Price rating attribute minimum range = 450 & maximum range = 26000 ie. Items with prices = 450 will have (0) star while those with prices = 26000 will have (5) stars
12. Star Rating atribute (Actions) menu
    - Stars are supported with 3 different actions: Hyperlink, Refinable, More Detail
    - Hyperlinked Stars's tooltip is inherited from the star rating tooltip
13. Alignment
    - Star rating attributes support right, left or centered alignment based on their position in the list template
    - Star rating attributes can be repositioned by drag and drop across the list template
    - Multiple star rating attributes are supported, Such as:
      - Price Rating

- Item Rating

EBS Quick Links

About Quick Links

EBS Quick Links component facilitates the quick and easy integration across Oracle Information Discovery applications as well as between Oracle Information Discovery applications and Oracle E-Business Suite forms and OA pages while honouring FND security and filter propagation and mapping .



Using Quick Links

Quick Links allows you to navigate and filter different types of target pages, such as:

- Endeca page – different application

- Endeca page – Same application
- EBS OA page
- EBS Form

User can select attributes of any data type for defining mapped filters and also can determine whether they will be displayed or hidden when applied on target pages.

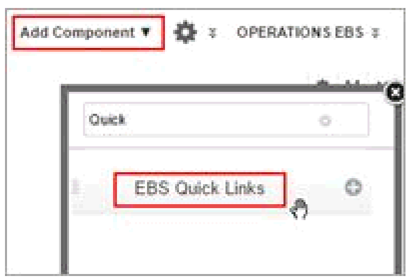
Example

Clicking (Closed Claims) Quick links on Transaction Summary Source Page which is filtered by (A. C. Networks) customer.

Opening (Closed Claims) Endeca target information discovery page of other application filtered by the same hidden customer refinement value.

Configuration

1. Log in to Oracle Endeca Information Discovery Studio as the Admin user.
2. Click Add Component menu to select EBS Quick Links component.



3. Place the EBS Quick Links Component before the Selected Refinements component
4. Rename the component name to Quick Links and click options menu
5. Click Add Link button to enter the details of the new quick link, representing the target page type and its URL as well as specific attributes (filters) required to be applied from the source page to the target one
6. Enter a caption for the quick link that will appear on the page
7. Enter target page URL according to its type, using the following syntax:
    - Endeca page

      /endeca/web/ont/ont-open
    - EBS OA page

/OA_HTML/OA.jsp?OAFunc=EA_WORK_REQUEST_CREATE

- EBS java form

  /OA_HTML/callForms.jsp?functionCode=WIP_WIPTXCFM

8. In the EBS Security Function field, enter the target page EBS function name.

   Note: If the user doesn't have access to this EBS function, This Quick Link will not appear in the Quick Link component based on the FND security check.

9. Select the type of page into which the target page opens, either:

   - Endeca Extension Page
     - Select this option for endeca target page only
     - Where the target endeca page opens and displays its components under the same tab name of the source page
   - OA Page
     - Select this option for any type of target pages using /OA_HTML/ url syntax
     - Where the target page whether Endeca, EBS OA page or EBS form will open in new tab under the page tab specific name

10. For Information Discovery target pages, insert the base dataset view key in the target dataset viewKey field.

    Note: In case the target page is (OA Page) only, it is optionally allowed to click the check box that enables the target page to open in a new window.

11. Note that (Propagate Filters) checkbox is enabled by default.

    - Where any target page filters are propagated to the target page through the deeplink.
    - The propagated filter is applied on the target page based on:
      - Enabled Refinement rules on propagated filters (In case of linking to endeca target page of the same application)
      - Filter Mapping (In case of linking to endeca page of other application or

Oracle EBS forms or OA pages)

12. For a target page that is in another application, enable Filter Mapping checkbox

13. Click Add Attribute Mapping button to start mapping the attributes of the source page (ont) to those on the target page (outstanding receivables).

    Accordingly, values of any mapped attribute will be applied and filter the target page through its mapped target attribute

14. In the Source Attribute field, enter the key attribute name of the source page.

15. In the Target Attribute field enter the key attribute name of the target page

16. Optionally, enable the Hide Refinement option for the target page.

    Recommended for range filter attributes of number or date data type

17. Click Save button

18. Click Save Preferences button

EBS Global Searchbox

About EBS Global Searchbox

EBS Global Searchbox allows an Endeca search box to be embedded in any OA framework page. It facilitates quick search action against the associated data domain. The search action will trigger a redirection to the same page or different destination page.

EBS Global Searchbox allows users to submit keyword searches. Also can configured to provide type-ahead suggestions listing attribute values that match the typed text.

Using EBS Global Searchbox

EBS Global Searchbox can appear in the header of any OA Page in EBS. It includes these features:

1. Visually lightweight Endeca page that only contains a search box and eliminates all other clutter and standard chrome components.

2. Submit button, perform deep link on the default selected data set target page

3. Invoke a target page based on record/value search

4. After completing the search, page navigates to destination page and the data are

refined to only include records with the matching search terms or selected attribute value.

To complete a search using EBS Global Searchbox:

1. In the field, type the search terms. As you type the search term, a list of attribute values containing the search terms is displayed.

   Within the list, the matching values are grouped by attribute, and then within each attribute, displayed based on relevance ranking. If you are searching across data sets, then the attributes are grouped by data set.

2. To do a keyword search for the terms you entered, either:

   - Click the search icon
   - Click the keyword search option displayed on the type-ahead panel
   - Press Enter

When you complete the search, the data is refined to only include records with the matching search terms or selected attribute value.

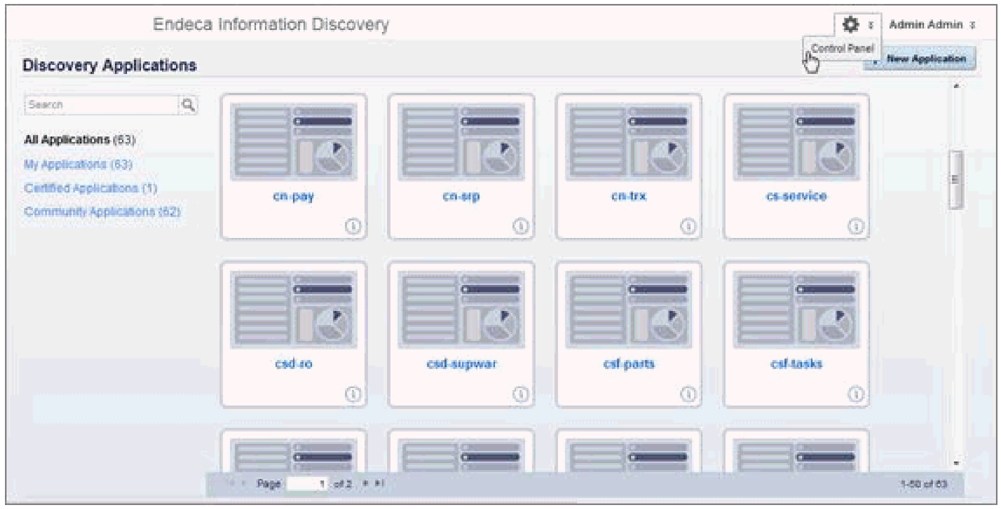
Configuration

The following uptake steps need to be uptake with the same order of implementation for the global search box.

Create New Page

To create a page in your Oracle Endeca Information Discovery Studio application, complete the following steps:

1. Click the Settings icon and select Control Panel.



2. For the application to which you want to add a page, click Action and then select Manage Pages.

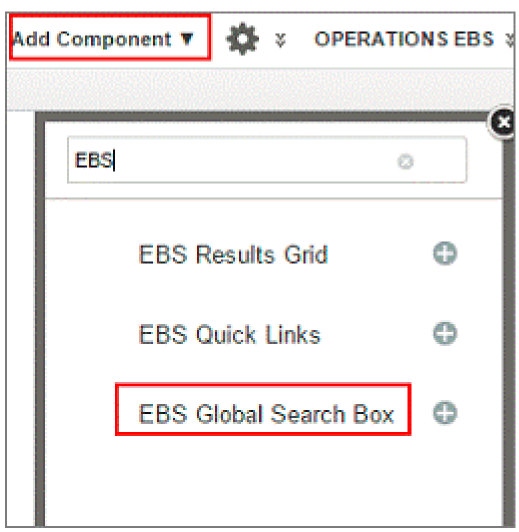
3. Enter a name for the new page, the click Add Page

   Note: The name of the new page must be the same as the associated FND function name

4. Enter a friendly URL for the page and click Save

Add and configure EBS Global Search Box Component

1. In the global search box page, add only EBS Global Search Box Component



Note: Once the component has been added to the page, the page header and footer will be hidden.

2. EBS Global Search Box comes with a layout called EBS Global Search Template Layout. Set this in Oracle Endeca Information Discovery Studio. Click the Settings icon, then click Page Layout and select EBS Global Search Template Layout.

3. Click Configuration.

   The Configuration page displays the list of application data sets, plus an entry for All Data.

4. Enable or disable the type-ahead search capability for each data set. If type-ahead is enabled, you can edit the type-ahead option.

   To configure the global search box type-ahead search:

   - Click the pencil icon in the Enable Type-Ahead column.
   - In the Minimum characters to trigger suggestions field, set the minimum number of characters that the user must type before type-ahead suggestions are offered.
   - In the Maximum suggestions per attribute field, set the maximum number of type-ahead suggestions to initially display for each attribute.
   - In the Maximum total suggestions per data set field, set the maximum total number of type-ahead suggestions for each data set.
   - In the Type-ahead Attributes list, check each attribute for which you want to enable type-ahead.
   - Click Save.

5. To enable keyword search for a search option, check Enable Keyword Search. This checkbox is displayed only for search options associated with a search interface.

6. To select a search option as the default redirect URL for keyword search, select Default Selection.

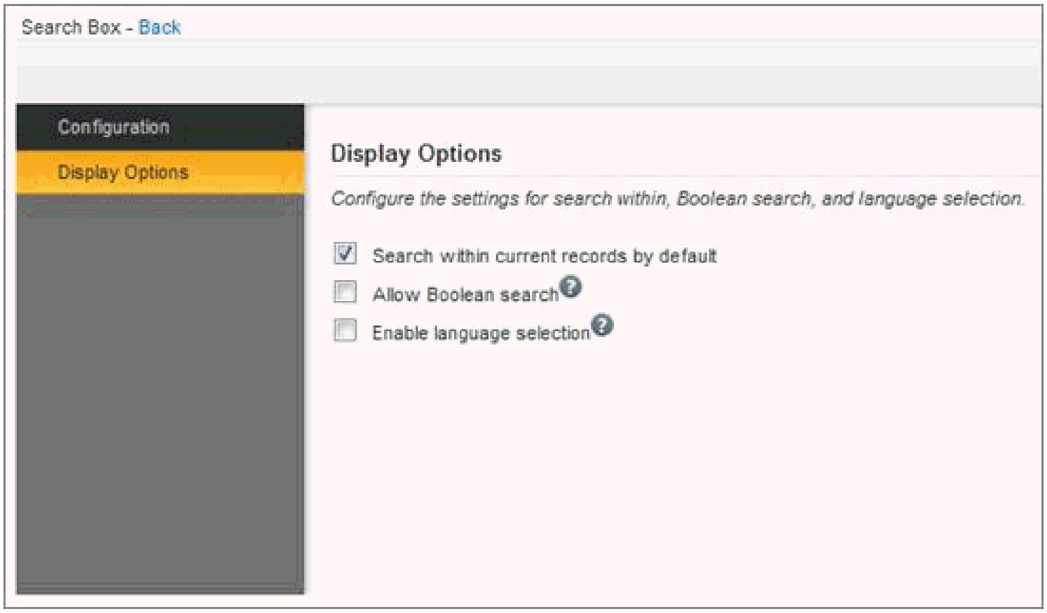
7. If a keyword search is enabled, then from the Match Mode drop-down list, select a match mode for the search option.

8. In the Target Page field, enter the page to display when the search is executed.

Display Options

To configure global search properties, click Display Options in the left hand navigation.

- Optionally, enable Boolean search.
- Optionally, enable language selection.



Create an EBS Function

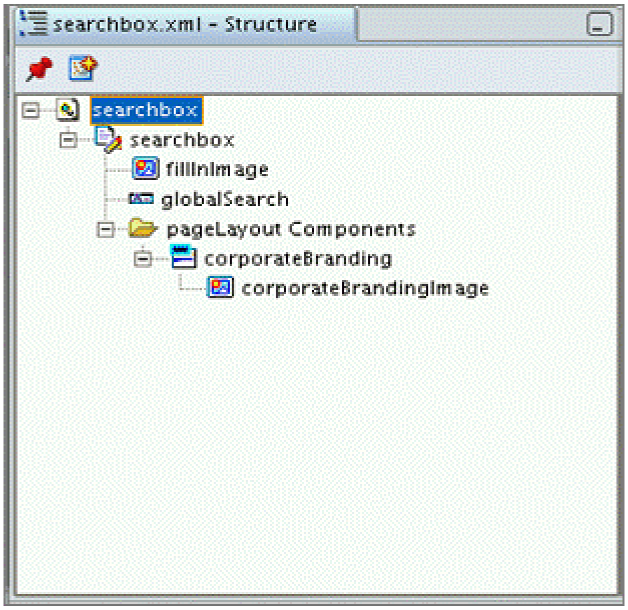
Create an EBS function to link the Endeca page that contains the global search box with the Oracle E-Business Suite.

To create the EBS Function:

1. Log in as Sysadmin.
2. From the Functional Administrator responsibility, navigate to Core Services and then to Functions.
3. Click Create functions.
4. Enter all required fields. In the HTML Call field enter the URL of the Endeca page that contains the Global Search Box component.

Create an Oracle Application Framework Page

1. Add the EBS Global Search Box in the Oracle Application Framework page and call another Oracle Application Framework page with Oracle E-Business Information Discovery content.
2. Create an Oracle Application Framework page with rich containers for the EBS Global Search Box, which will be called "globalSearch."



3. Make sure to name the rich container globalSearch.

4. Configure the globalSearch component to redirect to the previously created EBS Function. In this case, the EBS Function is called SEARCH BOX.

5. Set the Height and Width of the component.

6. For a friendlier UI and better performance, a temporary image must be placed before the EBS Global Search Box rich container in its container layout. The temporary image should be named "fillInImage". The temporary image will be quickly rendered before the EBS Global Search Box is loaded, and will disappear after the EBS Global Search Box is rendered.

   - The URI of the image must be set as "/endeca/html/css/eid-default/images/oracle-default-images/icons/dimmed_search.png".
   - The height of the search box is static at 26 pixels. The height of the filler image should be the same.
   - The width of the filler image is set according to width of the EBS Global Search Box.
   - The height of the Global Search rich container must be set to zero to hide it until it is completely rendered.

7. In the EBS Global Search Box configurations, set the target page to the Oracle Application Framework page that contains "OA_HTML." Global Search will understand that search result will be redirected to another Oracle Application

Framework page.

- a. The constructed deeplink will be saved in the AppSession as an attribute called constructedDeeplink.

- b. The target Oracle Application Framework page must get the deeplink from the session and then apply it as a parameter to the Oracle Endeca rich container as directed in the following code sample:

```
/**
* Layout and page setup logic for a region.
* @param pageContext the current OA page context
* @param webBean the web bean corresponding to the region
*/
public void processRequest(OAPageContext pageContext, OAWebBean
webBean)
{
super.processRequest(pageContext, webBean);
String deeplink="deeplink=";

OAApplicationModule am = pageContext.getRootApplicationModule();

OADBTransactionImpl txn = (OADBTransactionImpl) am.
getOADBTransaction();

WebAppsContext ctx = (WebAppsContext) txn.getAppsContext();

String constructedDeeplink =ctx.getSessionAttribute
("constructedDeeplink",true);

if (!constructedDeeplink.equals("constructedDeeplink")){
deeplink= deeplink+constructedDeeplink ;

OARichContainerBean simpleBean1 =
(OARichContainerBean)webBean.findChildRecursive
("endecaContainer");

if (simpleBean1 != null) {
simpleBean1.setParameters(deeplink);
}
/*reset session parameter to make sure no other endeca rich
container make use of the deep link*/

ctx.setSessionAttribute("constructedDeeplink","
constructedDeeplink");
   }
}
```

EBS Multi-view Available Refinements and Selected Refinements

Out of the box Selected Refinements and Available Refinements components support only one collection (data set).

The two custom components, Multi-view Available Refinements and Multi-view Selected Refinements support mlutiple collection key (data sets)

Users can use these two components if their page contains components read from more than one data set.

Multi-view Selected Refinements

About Multi-view Selected Refinements

The multi-view Selected Refinements component allows users to view and quickly make adjustments to the current refinement state for all data sets in the application.

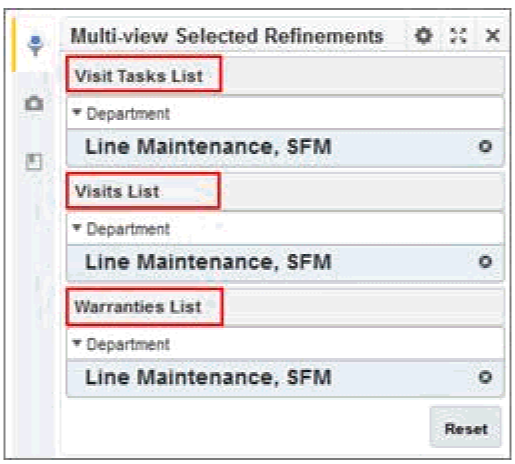
The component includes entries for:

- Multi-view Available Refinements selections
- Keyword searches

It also includes attribute refinements selected when end users click values displayed on other components

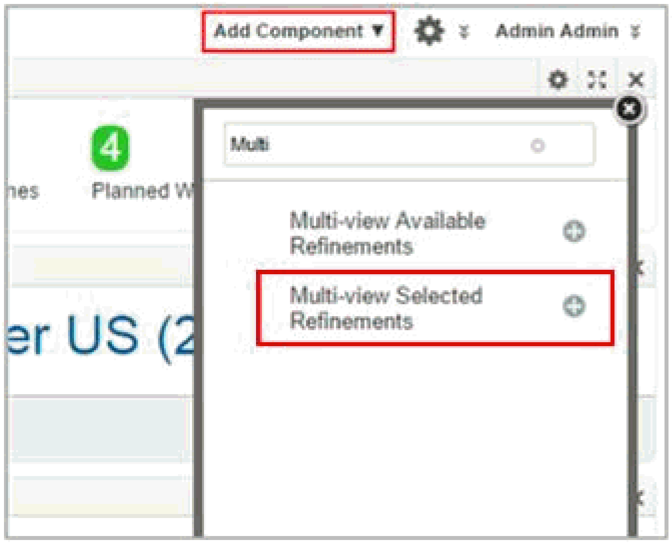
Using Multi-view Selected Refinements

The multi-view Selected Refinements component displays refinements for attributes that belong to all associated data sets.



Configuration

1. Click the Add Component dropdown menu.



2. Add the Multi-view Selected Refinements component

3. Click Options.

4. On the Data Selection tab, click the check box next to the view to use

5. After selecting the base views, click Keep both sections.

6. Click Continue.

7. Optionally, On the Display Options tab, in the Multi-select collapse/expand threshold field, set the number of attribute values after which the list can be collapsed

8. Click Save and Exit.

Multi-view Available Refinements

About Multi-view Available Refinements

The Multi-view Available Refinements component displays the currently available values or value ranges for selected attribute from more than one data set.

Using Multi-view Available Refinements

The Multi-view Available Refinements component displays available attributes that belong to all associated data sets.

Configuration

1. Click the Add Component dropdown menu.

2. Navigate to the Multi-view Available Refinements component and click Options
3. On the Data Selection tab, to select the views to use for the component, click its check box. The Multi-view Available Refinements component can use more than one data set base view.
4. Click Keep both selections.
5. Click Continue.
6. On the Attribute Selection tab for the first base view, to include or exclude an attribute group on the Multi-view Available Refinements end user view, check or uncheck its checkbox.

   By default, for a displayed group, all of the attributes in the group are displayed.
7. Within a group, to not display an attribute on the end user view, uncheck its checkbox.
8. The same configuration for the others base views.
9. Click Save and then click Exit.

Summarization Bar Metric Refinement

Summarization Bar

The Summarization Bar allows users to quickly view metric or dimension values that summarize aspects of the underlying data.

The Summarization Bar displays one or more summary items. You may be able to display additional information about an item, or use an item to refine the data or navigate to another page or site.

Each summary item contains one of the following types of values:

Summary Item	Value Description
Metric Value	The actual value of a specific metric. For example, an item could display the total sales or average profit.

Summary Item	Value Description
Dimension Value	The dimension value associated with either the top or bottom value of an associated metric value. For example, an item could display the product category that has the highest total sales.
Number of flags	The number of flags. Flags are based on the value of a metric for a selected dimension or dimensions. For example, a flag summary item could reflect the number of product categories for which the total number of sales is greater than 500.

Metric Refinement

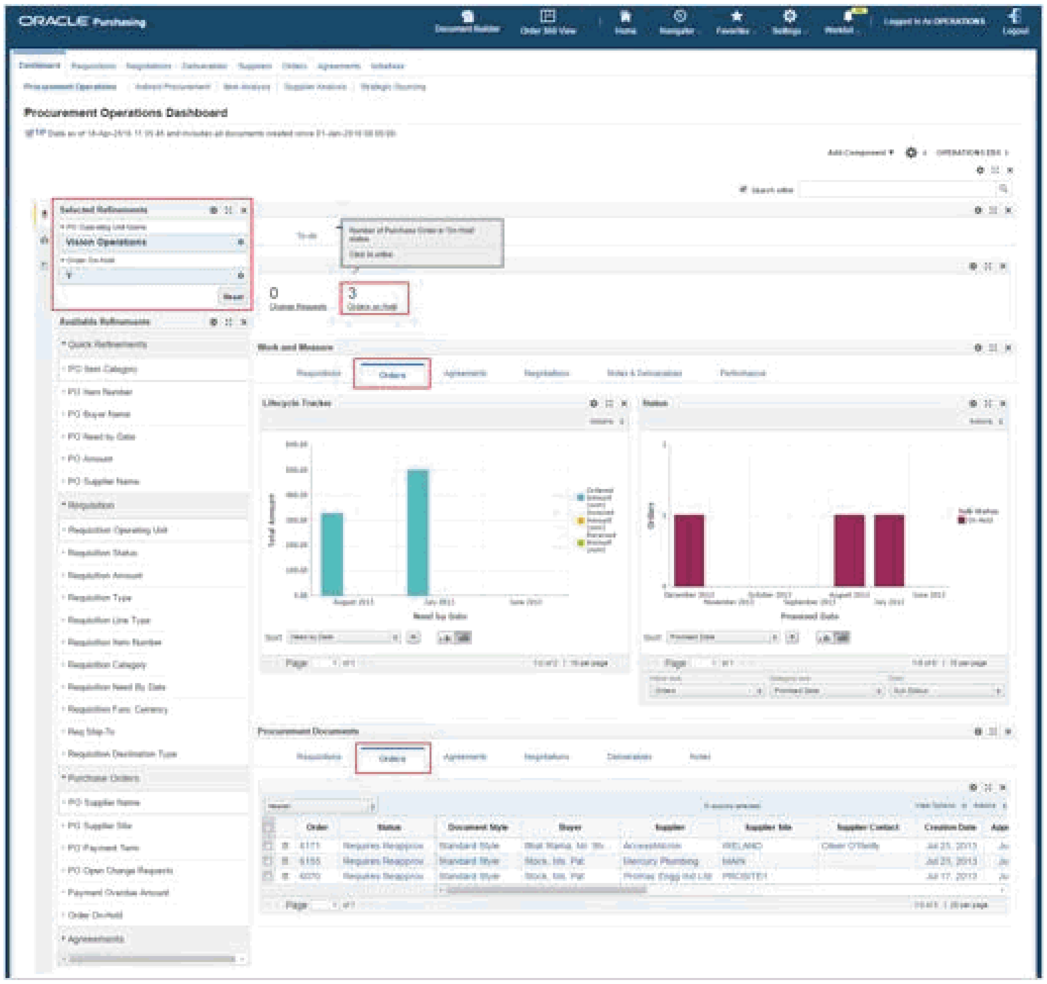
However, in order to view the details of crucial figures presented by metrics, extensive manual refinement efforts are performed to drill down to their detailed information as well as redundant result tables and bookmarks are added to represent specific business use case.

Metric Refinement new custom feature supported in Release V8 of information discovery dashboards enables users to directly refine the whole information discovery dashboards with multiple conditions configured per each metric. And allows optional navigation to new destination page.

Using Metric Refinements

Upon clicking the underlined metric refinements, the whole Information Discovery dashboard is filtered by one or many refinement values.

In addition, Users can open specific tabs on the current Information discovery filtered page or a specific tab in another Information discovery page of the same application.



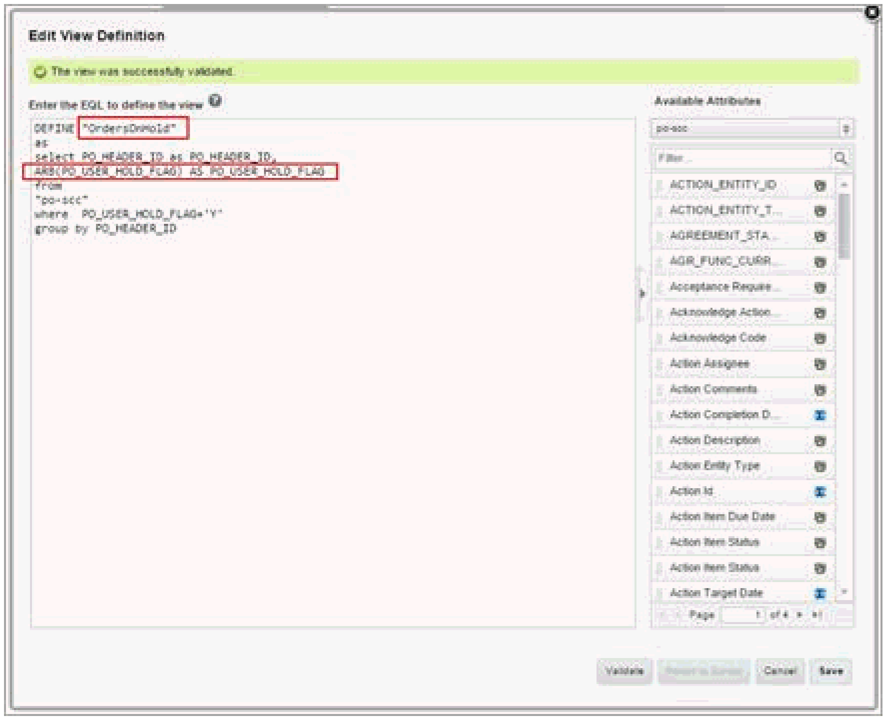
Metric refinements can be configured by multiple metric values that are applied in an (AND) fashion all at once when the metric refinement is clicked. Metric refinements can be of different data types and values:

- Metric (numeric) refinement values support negative to positive amount ranges.
- Date/Time refinement values are configured in terms of (negative to positive) n days, where:
  - (0 days) represent studio sysdate
  - (-n days) represent dates before studio sysdate
  - (+n days) represent dates after studio sysdate

Configuration

1. Navigate to the application's view manager and create new custom views or update

old ones with the metric attribute and its refinements.



2. Navigate to the summarization bar studio component ,through options button, to create a metric refinement in the following fashion:

3. In Select Data tab; Select the view that includes the required metric and its refinements

4. In Select Item Type tab: Select Metric Value

5. Define the metric value and its display options

6. Move to the newly introduced Action menu and select Refinement from the actions drop-down list to start implementing the refinement action.

7. In the Target Page radio button options; Select the target page type where the metric refinement is required to navigate, either to:

   - Current Page (default)

   - Other Page

     - Other page usually refers to any other page in the same application

     - Insert the other target page in the following syntax /pagename such as: /assets

8. Optionally, insert the required tab details to which the current page will navigate after being refined by the metric refinement.
   - For navigating to specific tab(s) on the current page:

     Use the Target Page Tab Details text field to add the required tab information in the following syntax:

     FirstTabbedComponentID[TabNumber]::SecondTabbedComponentID [TabNumber]

     Such as: nested_tabs_INSTANCE_m4dA[2]::nested_tabs_INSTANCE_yh8V[2]
   - For navigating to specific tab(s) on other page:

     Insert other target page tabs details navigation concatenated with the other page name in the following syntax:

     /mypagename#FirstTabbedComponentID[TabNumber]:: SecondTabbedComponentID[TabNumber]

     Such as: /assets#nested_tabs_INSTANCE_9tOH[3]:: nested_tabs_INSTANCE_huB8[2]
9. In Define Metric Refinements option, click + Metric Refinements button to start adding new refinements values using different operators for metrics filtering current page
10. Click Select attribute button
11. Select the required metric refinement from the attributes available n the metric's data selection view and click Apply button
12. Insert the required value of the selected attribute, in terms of both:
    - Operator type; that applies the selected attribute value in either:
      - (Equal) value refinements
      - Negative refinement, using (Not Equal) operator
      - Range values operators, such as: Between, Less than or Greater than
    - Insert the value itself corresponding to the selected refinement in the Attribute Value field.
      - Such as 'Y'
13. Optionally, Click +Metric Refinement to add extra metric refinements conditions.
14. Optionally configure the conditional formatting of the metric refinement, by

moving to the next Conditional Formatting tab

15. Click (Save) button

Translation Note

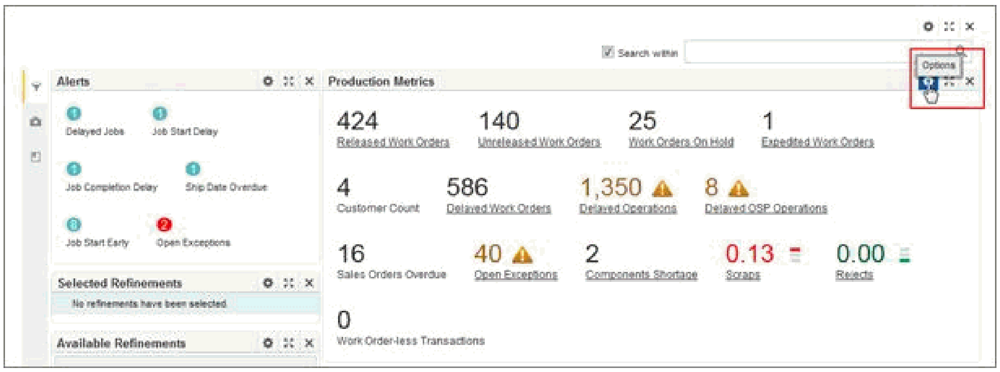
Multi-national customers running EBS in languages other than English may have to adjust the configuration of metrics that have the refinements feature turned on. This scenario impacts refinements that are based on a language sensitive filter.

Example

The underlying data storage in Information Discovery is language specific. Take the example of JOB_STATUS attribute in Manufacturing. The value of the flag is language sensitive as it is displayed to the end user in their own language. If a metric refinement filter is defined for attribute JOB_STATUS to be equal to 'Released', that filter will be specific to English only. If a user logs with a different language such as Korean then that filter value will not work as the data will store the value in Korean rather than English or code.

To resolve this, once the page is transalated from the base English langague to Korean, in this example, customer will need to update the metric refinement configuration with the corresponding word, as follows:

1. On the Summarization Bar edit view, the Summary Items tab displays the current summary items



2. Edit the configuration of a summary item
   - Click the edit icon on the summary item
   - The Define Item tab is displayed to allow you to change the item configuration.

3. Click Actions to configure the action for the displayed value

4. In Define Metric Refinements, update the attribute value with the corresponding word

5. Click Save and Exit

Now when user clicks on the metric refinement, the page will be filtered and the translated value will be displayed in the selected refinement.

C

Advanced Search Capabilities

This appendix covers the following topics:

- Overview
- Partial (Wildcard) Search
- Interaction of Partial Search with Other Features
- Performance Impact of Partial Search
- Partial Search Guidelines
- Exclude All Functionality

Overview

This appendix describes advanced search features of the Oracle Endeca Server that users access through applications built with Studio.

Search capability is a fundamental building block of Oracle E-Business Information Discovery and includes value search, record search, boolean search, and partial search.

Value search can be confused with record search, and understanding the differences between the two search types is important before creating a solution for a specific business problem using partial search and boolean search.

The following table lists the differences between value and record search:

Type of Search	Description

Value Search (Type-ahead search)	Using the Search Box component or type-ahead search in the Available Refinements component. Allows users to perform keyword searches across attributes of type string for values with matching values. Returns attribute values that match the user's search terms. The search result is presented in the suggestion list and categorized per attribute.
Record Search (Text search)	Using the Search Box component. Allows a user to perform a keyword search against specific attribute values assigned to records. Returns records that have matching attribute values, along with any valid refinement values.

Partial (Wildcard) Search

Partial search is the ability to match user search terms to fragments of words within text. Search operations such as value search and record search typically match user search terms to entire words.

For example, performing a record search for the word 'shop' returns only those results containing the specific word 'shop'. Text that contains 'shop' as a substring of larger words (such as shops, shopping, or workshop) returns no match.

In addition, performing a value search for the word 'shop' returns only those results beginning with the specific word 'shop'. Text containing 'shop' as a substring of larger words (such as workshop) returns no match.

With partial search enabled, you can enter a search containing the special asterisk operator (*). The asterisk operator matches any string of zero or more characters. You can enter a search term such as *shop* which will match any text containing the string shop, even if it occurs in the middle or at the end of a word such as 'shops', 'shopping'. or 'workshop'.

Partial search is useful for performing a text search on string attributes such as sales order numbers, asset description, project name, item description, and part numbers. For example, inventory users are searching for item number for 'Envory Custom Laptop 3064'. The data domain may contain records with item numbers such as QADPP3064 and QASDP3064 because these are the full item numbers specified by the supplier.

However, to end users these Envoy custom laptops are known by the more generic number 3064. In such cases, partial search is a useful feature to fill the gap between user terminology and the source data. For example, the user enters the search term *3064*, and the result returns all values containing this term such as 'QADPP3064', 'QASDP3064'.

You can configure partial search in value search and record search.

2.1 Partial Value Search

Search Box and Available Refinements type-ahead suggestions support attribute value search.

2.1.1 Setup Steps

Configure partial search during value searches in the Global Configuration Record (GCR). The GCR globally affects the enablement of partial search in value search for all attributes in the data domain.

To enable partial search in value search:

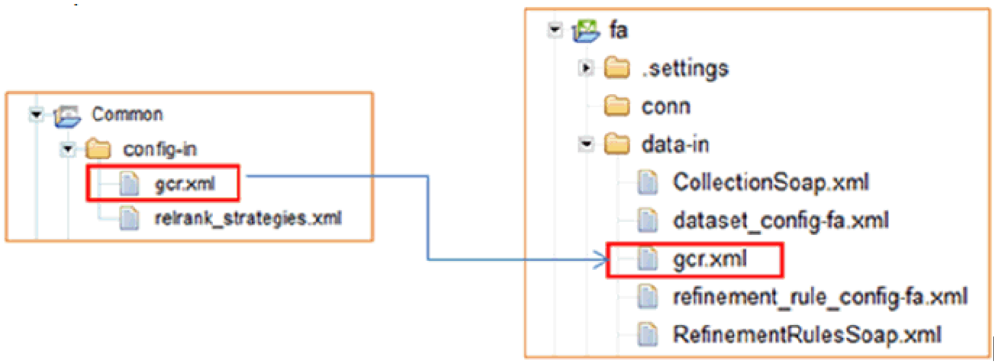
1. In the product sandbox , add the parameter GCR_FILE in the workspace.prm:

```
     <GraphParameter name="GCR_FILE" value="sandbox://<sandbox name>/data-in/gcr.xml"/>
```

```
<GraphParameter name="PROFILE_DIR" value="${PROJECT}/profile"/>
<GraphParameter name="RECORD_TYPE" value="fa"/>
<GraphParameter name="REFINEMENT_RULE_CONFIG_FILE" value="sandbox://fa/data-in/refinement_rule_config-fa.xml"/>
<GraphParameter name="SEQ_DIR" value="${PROJECT}/seq"/>
<GraphParameter name="SPEC_ATTRIBUTE_1" value="ASSET_SPEC"/>
<GraphParameter name="SPEC_ATTRIBUTE_2" value="MASS_SPEC"/>
<GraphParameter name="TRANS_DIR" value="${PROJECT}/trans"/>
<GraphParameter name="viewXMLFile" value="sandbox://fa/data-in/view_config-fa.xml"/>
<GraphParameter name="REL_RANK_STRATEGY" value="sandbox://fa/data-in/relrank_strategies.xml"/>
<GraphParameter name="GCR_FILE" value="sandbox://fa/data-in/gcr.xml"/>
</GraphParameters>
```

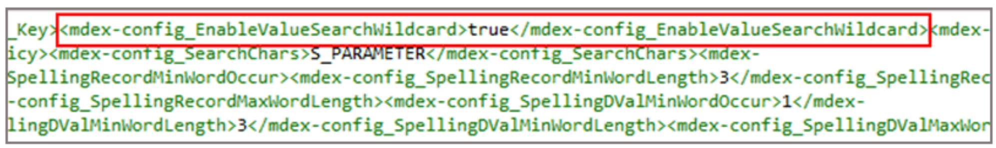
   This parameter specifies the location for gcr.xml.

2. Copy the file gcr.xml from the common sandbox (config-in folder) to the product sandbox (data-in folder).



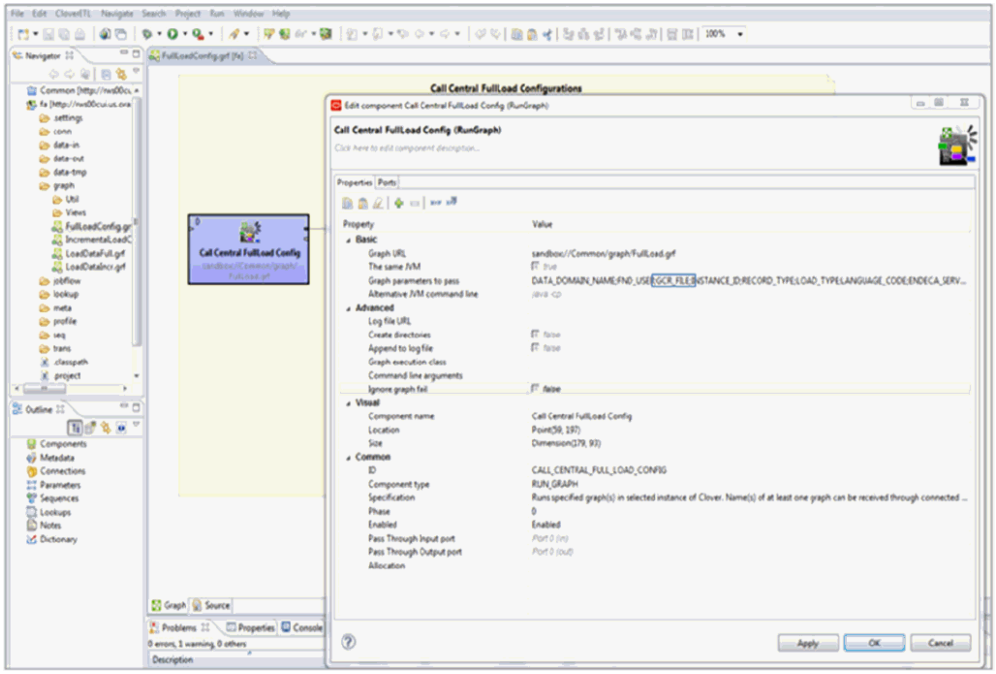
3. In the product sandbox, edit the gcr.xml file and set the parameter as follows:

```
<mdex-config_EnableValueSearchWildcard> to true
```



```
_Key><mdex-config_EnableValueSearchWildcard>true</mdex-config_EnableValueSearchWildcard><mdex-
icy><mdex-config_SearchChars>S_PARAMETER</mdex-config_SearchChars><mdex-
SpellingRecordMinWordOccur><mdex-config_SpellingRecordMinWordLength>3</mdex-config_SpellingRec
-config_SpellingRecordMaxWordLength><mdex-config_SpellingDValMinWordOccur>1</mdex-
lingDValMinWordLength>3</mdex-config_SpellingDValMinWordLength><mdex-config_SpellingDValMaxWor
```

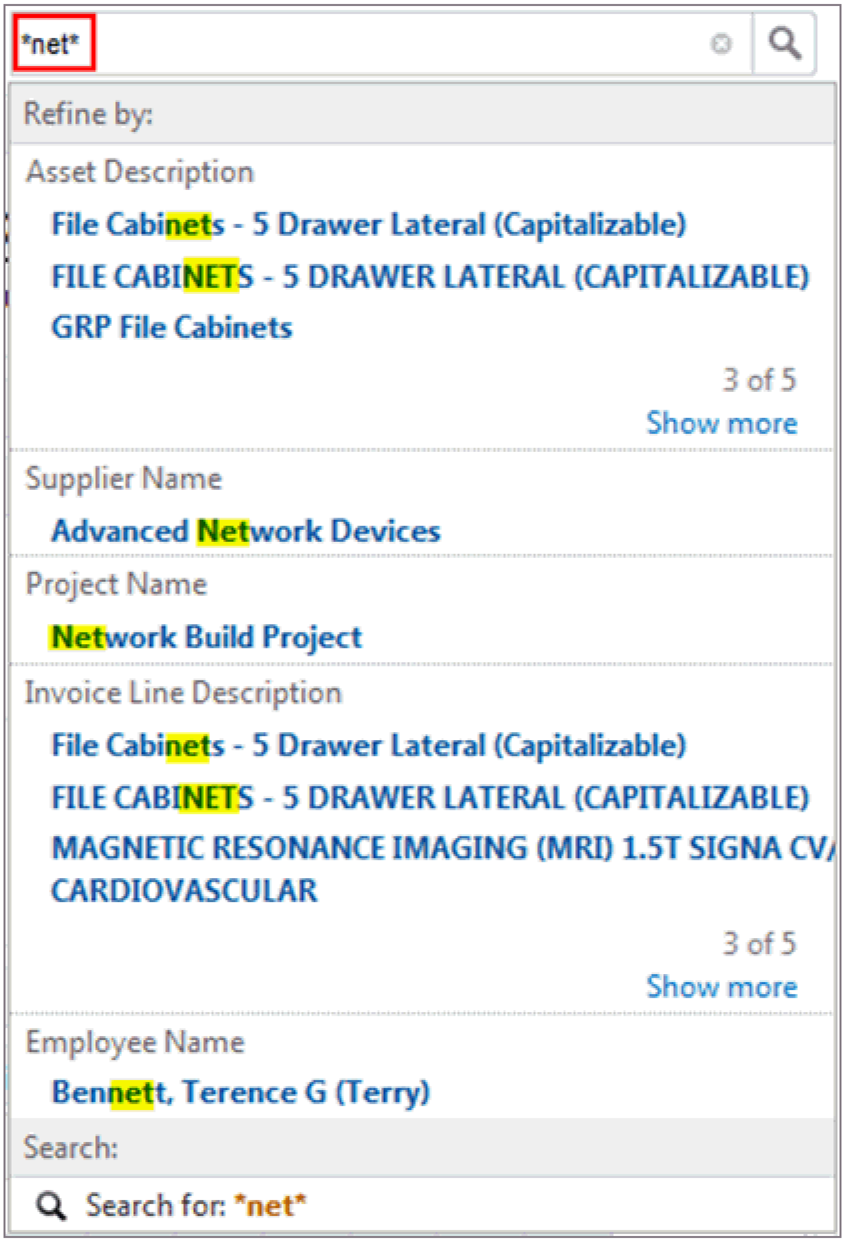
4. Using the Integrator ETL Designer, open the common sandbox at: graph > FullLoad.grf , and edit the Call Central FullLoad Config by adding the parameter: GCR_FILE in the Graph parameters to pass properly.



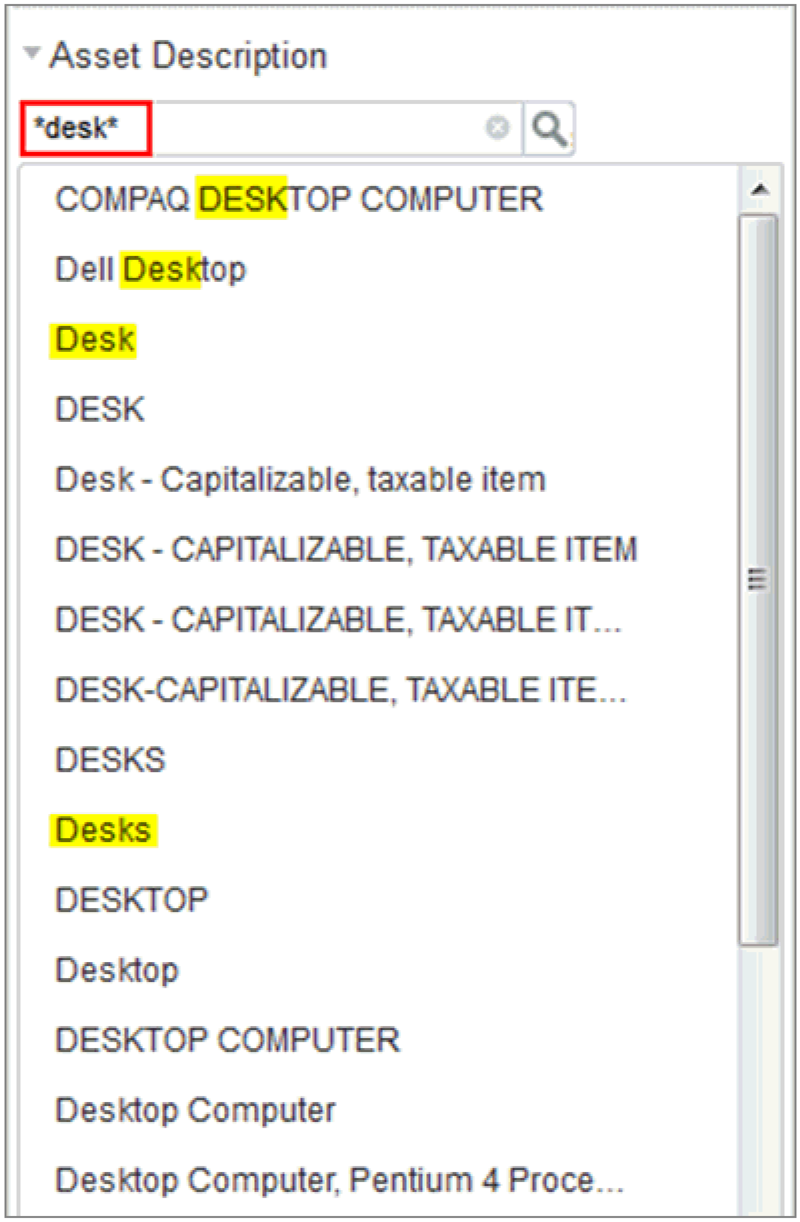
5. Run FullLoadConfig.grf.

Example

In the Search Box Component, enter the search term between two asterisk (*) operators. The partial value search result is presented in the suggestion list and categorized per attribute.



In the Available Refinement type-ahead search, enter the search term between two asterisk (*) operators:



2.2 Partial Record Search

Record search with boolean search is supported.

2.2.1 Setup Steps

Configure partial search during record searches by changing the attribute profile in the PDR to one of the following profiles:

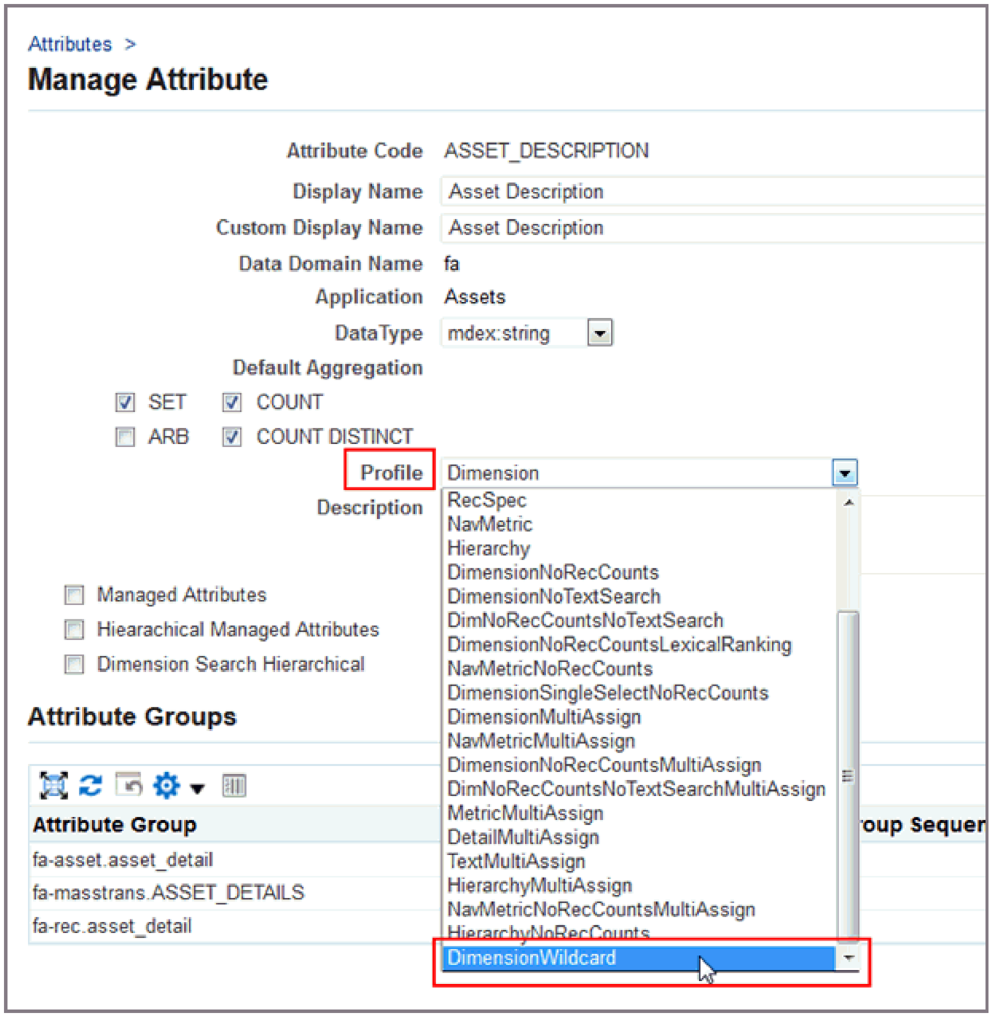
- DimensionWildcard: enables wildcard record search for Dimension type attributes.

- DimensionWildCardNoRecCounts: enables wildcard record search for Dimension type attributes without record count.
- WildcardNoRecCountsMultiAssign: enables wildcard record search for multi-assigned Dimension type attributes without record count.

Using either the SQL script or using the Information Discovery Developer responsibility from EBS:

To enable partial search in record search using the Information Discovery Developer responsibility:

1. Log in to EBS using 'sysadmin'.
2. Navigate to the Information Discovery responsibility.
3. Search for the data domain. The attribute must be enabled for partial record search.
4. Set attribute profile to *DimensionWildcard.*

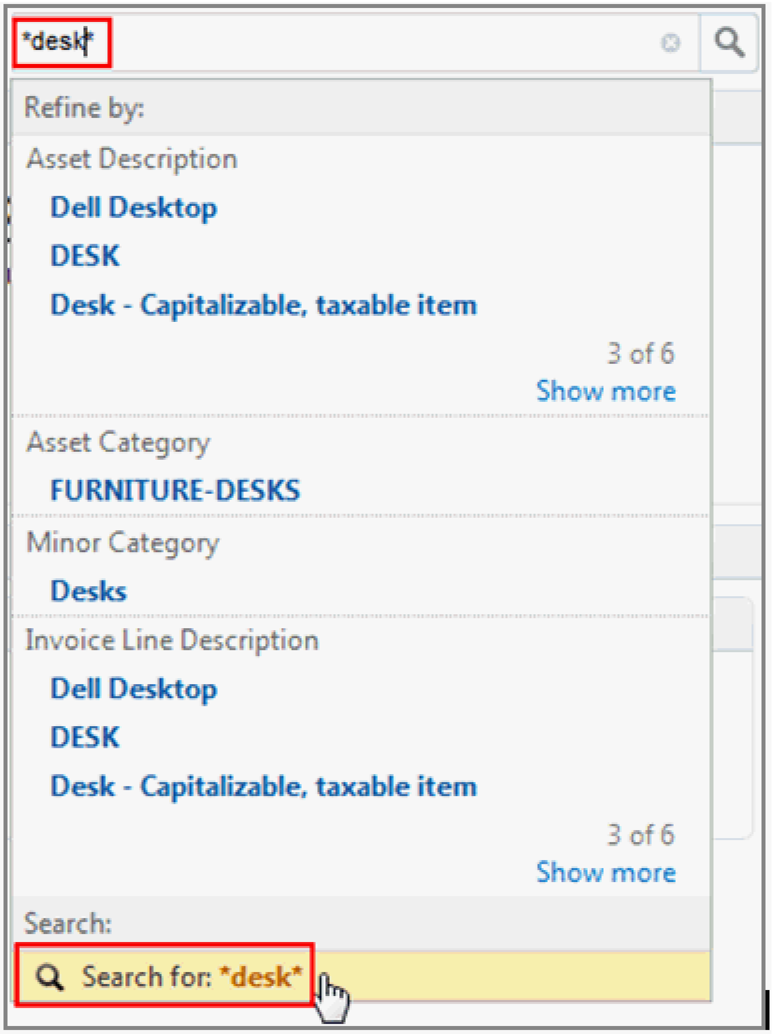


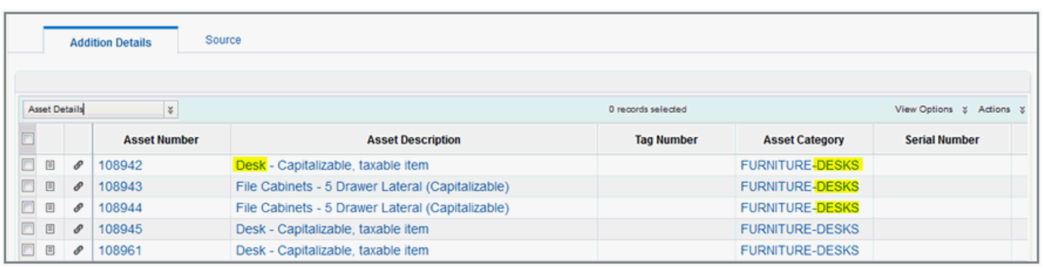
Note: The attribute profile *DimensionWildcard* enables wildcard record search for attribute types of 'Dimension' only.

5. Run FullLoadConfig.grf.

Example

In the Search Box, enter the search term between two asterisk (*) operators and press enter or click the search icons.





2.2.3 Partial Record Search with Boolean Expressions

2.2.3.1 Boolean Search

Boolean search allows users to specify complex expressions that describe the exact search criteria for their searches using AND, OR, AND NOT operators.

The following table describes boolean operations:

Operator	Description
AND	Executes an intersection of its two operands
OR	Executes a union of the two operands
AND NOT	Executes a set subtract, subtracting the second operand from the first

You can use parentheses to create sub-expressions such as: "red AND NOT (blue OR green)"

The parentheses operators have two meanings, depending on their usage:

- They can be used to group sub-expressions, as in "(red or blue) and car"
- Or, they can be used as AND operators in themselves.

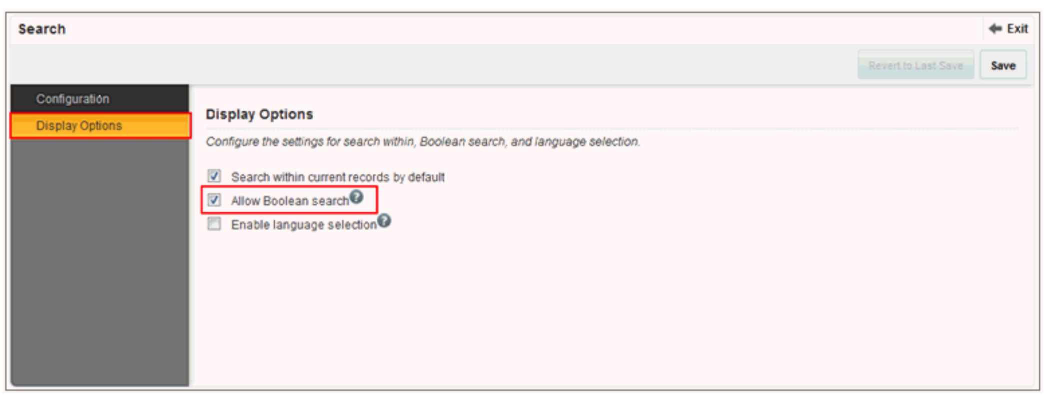
  For example, the query "(red or blue) car" automatically treats the ")" as a "AND". Thus the query would be treated as "(red or blue) and car".

2.2.3.2 Operator Precedence

The NOT operator has the highest precedence, followed by the AND operator, and then followed by the OR operator. You can control the precedence by using parentheses.

2.2.3.3 Configuration

To configure boolean search in Studio in the display option of the Search Box component, select 'Allow Boolean search'.

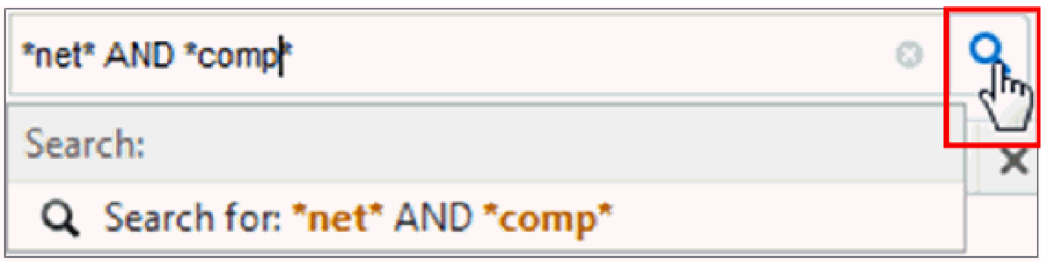


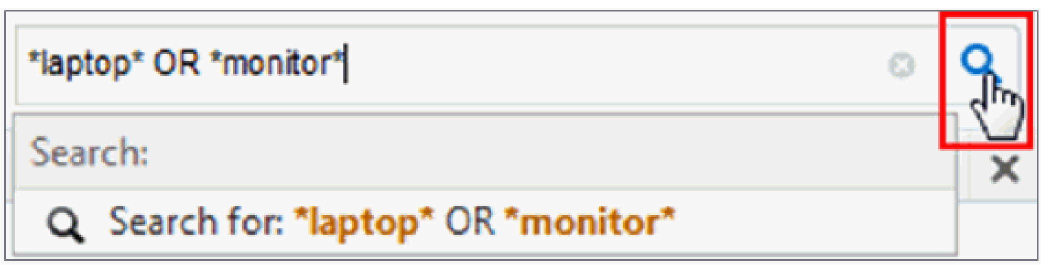
To use boolean search, set the match mode to boolean by selecting the 'Boolean search' check box.

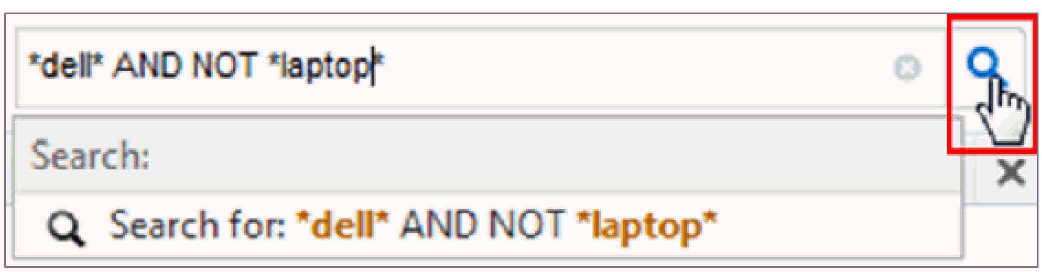
To use partial search with boolean expressions, use the asterisk (*) operator with boolean operators.

- Boolean Search is only available in the search box and is not available inside the Available Refinements.
- Enabling boolean search is only required if there is a requirement for it and if it is not already enabled out of the box.

Examples







Interaction of Partial Search with Other Features

The following table describes features that are either supported or not supported for partial search queries:

Feature	Support with Partial Search	Notes
Stemming	No	
Thesaurus matching	No	
Misspelling correction	No	Auto-correct and "Did You Mean?" are not supported.
Relevance ranking	Yes	
Snippeting	No	
Phrase search	No	

Performance Impact of Partial Search

If partial record search is enabled (even if it is not used by end users), then it increases the time and disk space required for indexing. You should carefully consider your business requirements when selecting and enabling attributes for partial record search.

For optimal performance, use partial search queries with a minimum of two or three non-wild card characters, such as abc* and ab*de. Avoid wildcard searches with one non-wild card character, such as a*. Wildcard queries with extremely low information, such as a*, require a significant amount of processing time.

Queries that contain only wildcards, or only wildcards with punctuation or spaces, such as *. (star followed by period), or * * (star space star), are rejected by the Oracle Endeca Server.

Partial Search Guidelines

Carefully consider your business requirements when selecting and enabling attributes for partial record search. If partial search is enabled separately for each attribute, then added complexity and misleading customer expectations may result.

A maximum of fifteen (15) attributes should be enabled for partial record search.

The best usage of partial search is to use two (2) star operators for a substring. For example:

- *com* returns the same result as *com

Partial search is not supported within more than one word. For example:

- dell*top

You can combine standard value search with partial search by writing the first search word, add a space, and then use the star operator for partial search in the next word. For example:

- dell *top (In this case there is an implicit AND operator)

Partial search results may vary depending on the attributes being considered during record search.

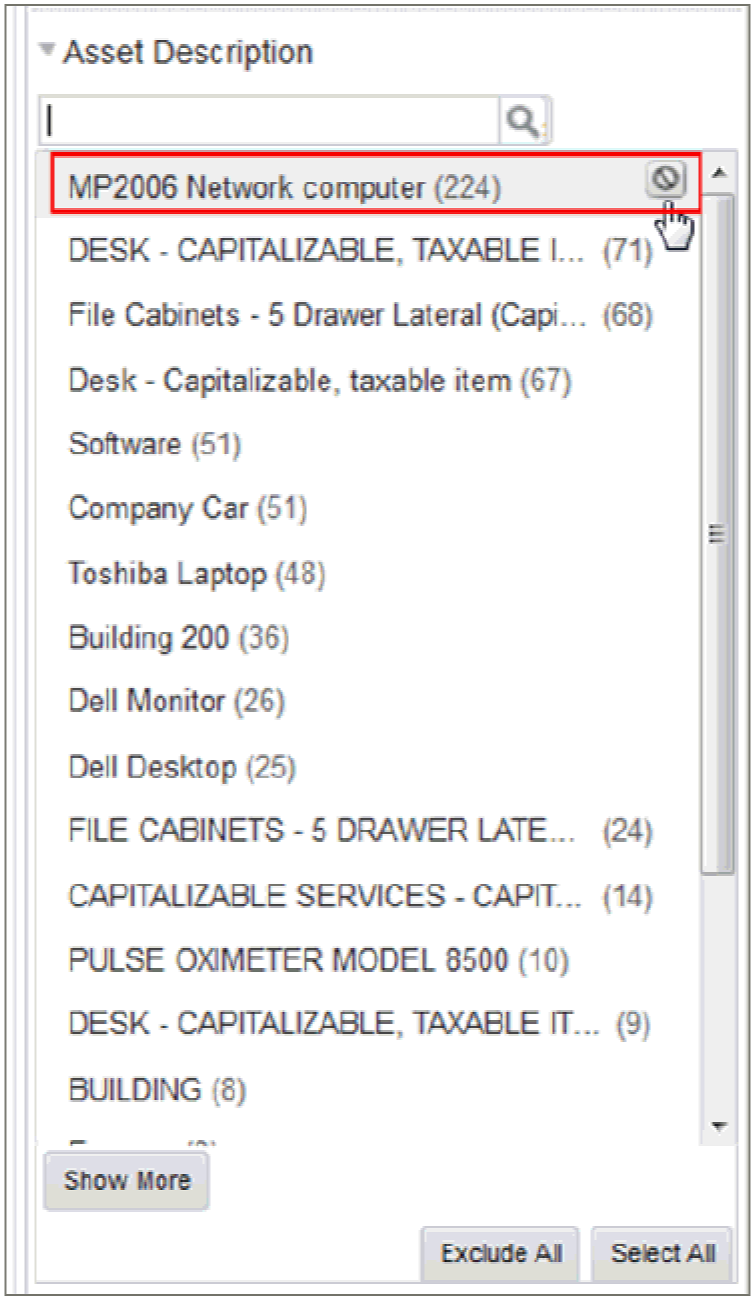
Exclude All Functionality

3.1 Negative Refinements

Negative refinement refers to data that is refined to only include records that do NOT match the selected attribute value.

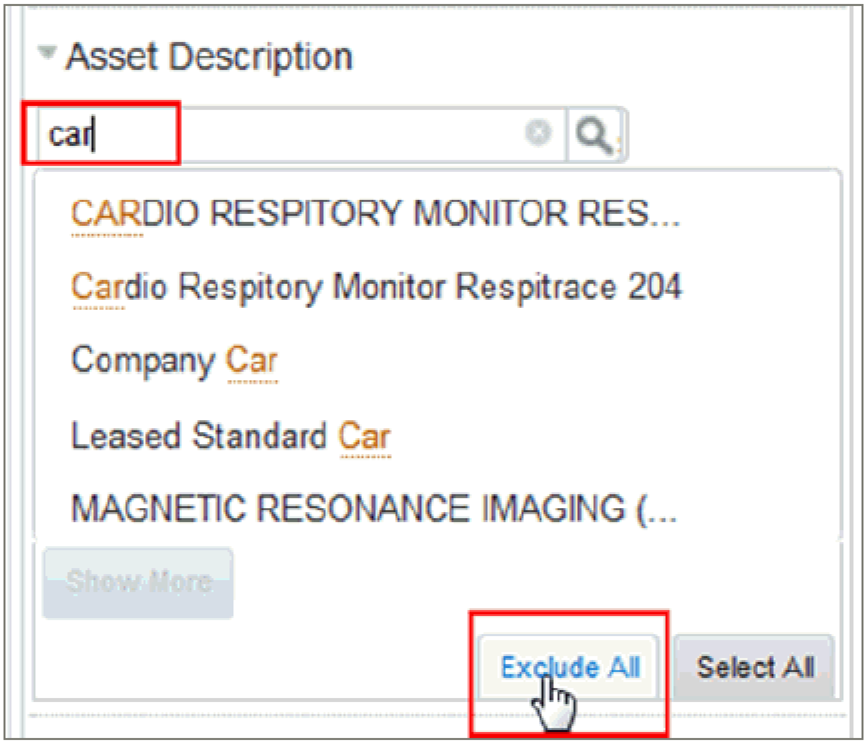
By default, negative refinements are available for each attribute in the 'Available Refinements' component.

Select the negative refinement icon for each attribute to refine the data to only include records that do NOT match that value.

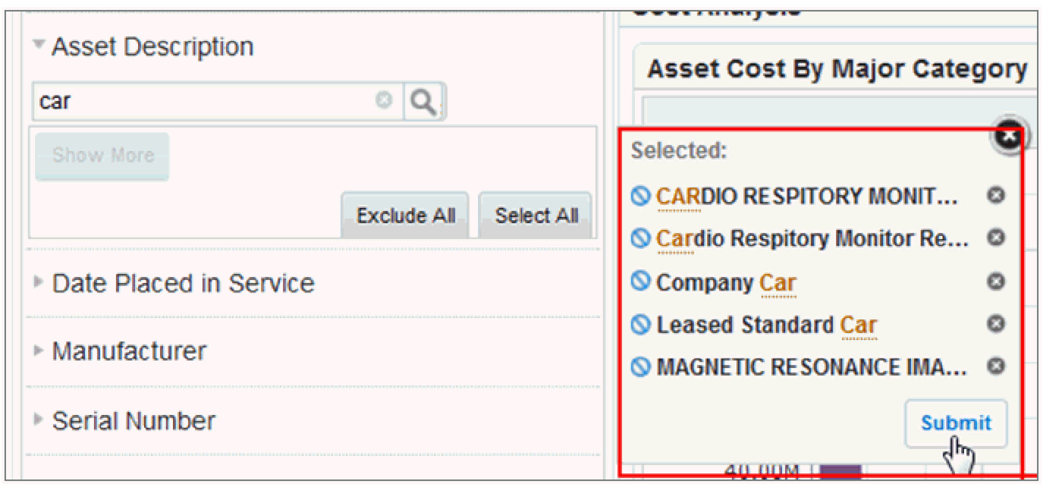


3.2 Exclude All

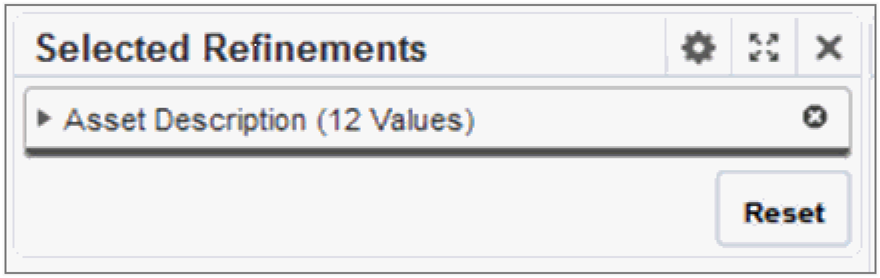
This functionality was added in the Available Refinements component in release V8.



The 'Exclude ALL' button lets you apply all values of the attribute as negative refinements.



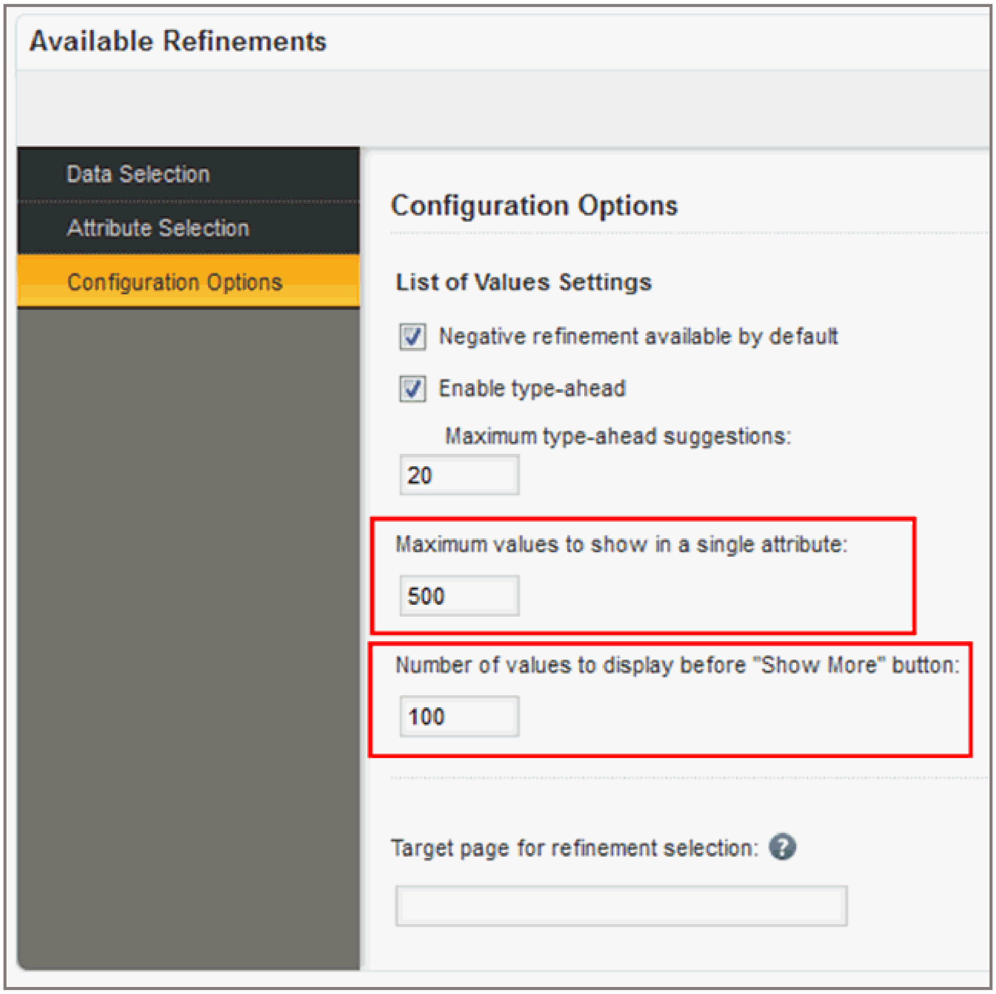
You can capture all matches regardless of how many display on the UI, and you are not required to click on show more to capture the entire list for additional refinement.



Note: You can use a filter to limit the number of distinct values used. The limit by default is 500 and can be changed from the Configuration Options tab of the Available Refinements window.

To configure this value:

1. Navigate to the Available Refinements window > List of Values Settings.
2. In the **Maximum values to show for a single attribute** field, enter the maximum number of values that can be displayed.
3. In the **Number of values to display before "Show More" button** field, enter the number of values to initially display.

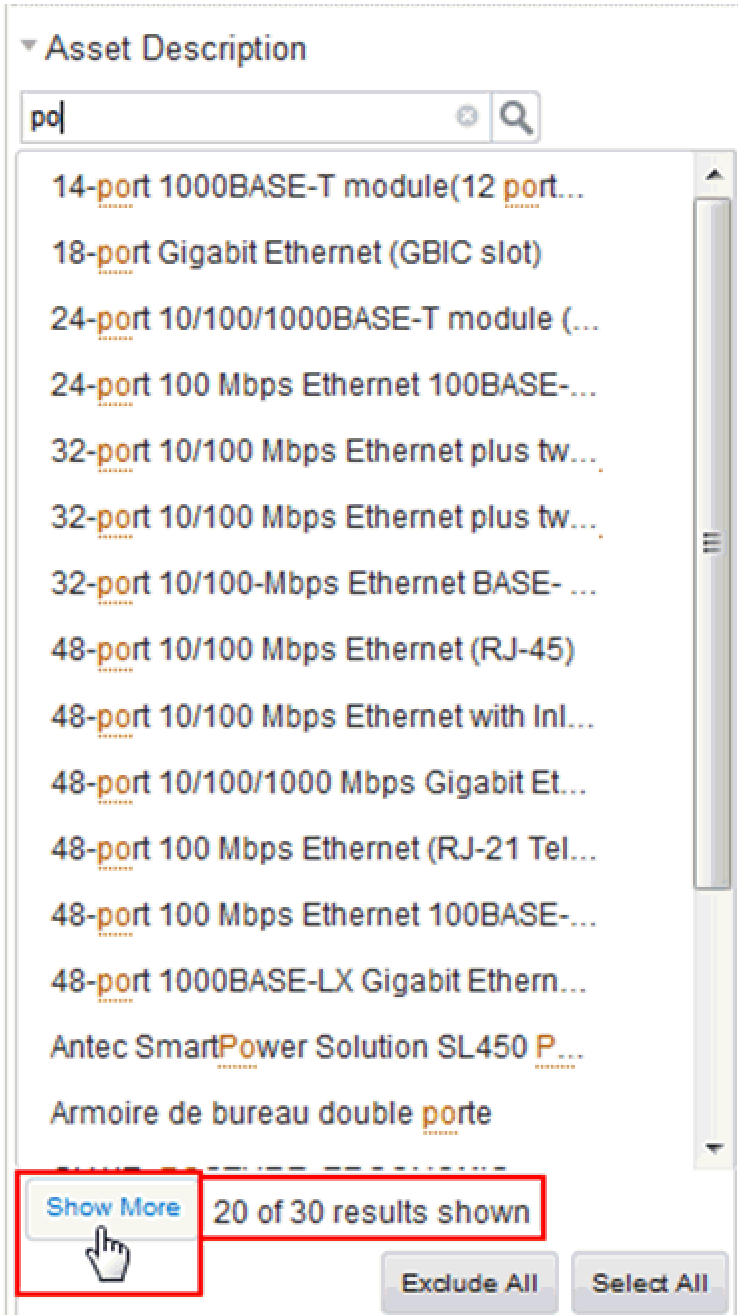


3.3 Show More

The Show More button allows you to display the remaining values, up to the maximum values set in the show setting.

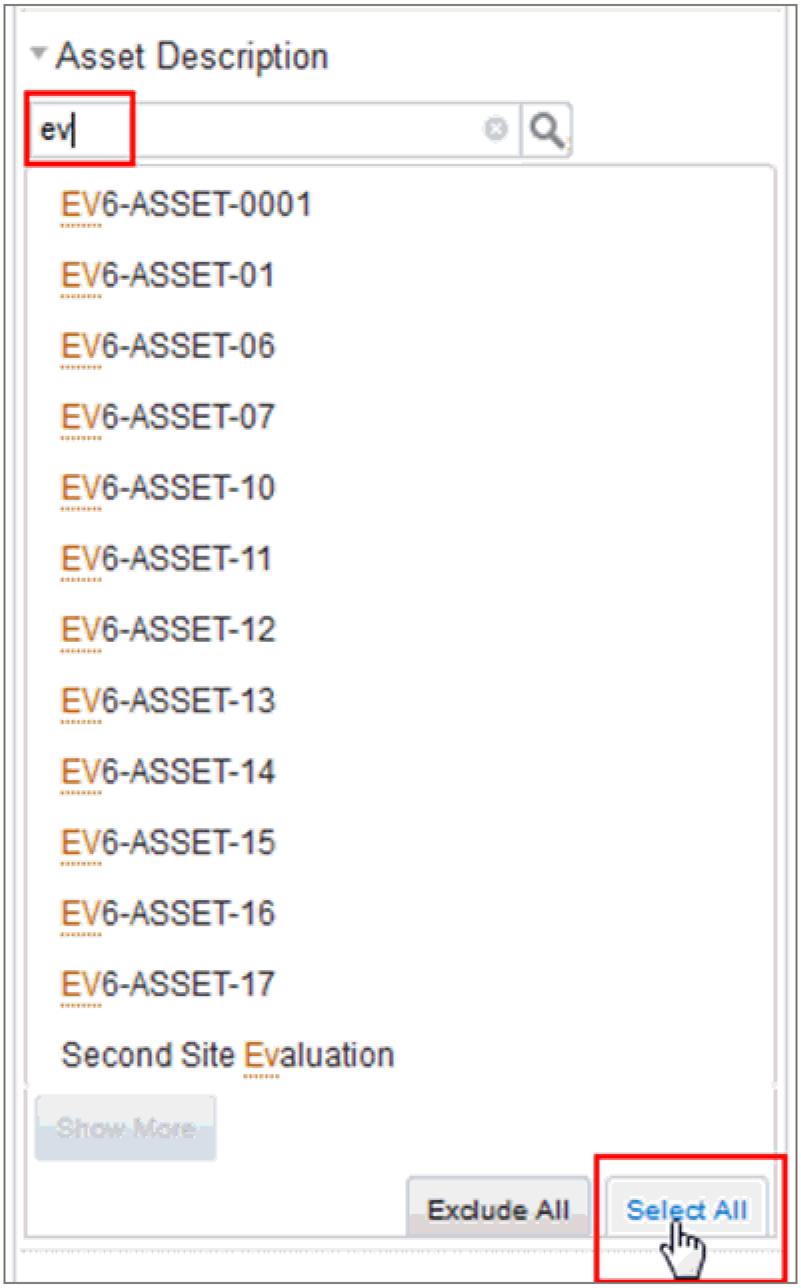
> **Note:** Show More functionality works with type-ahead search results in the Available Refinements component.

.

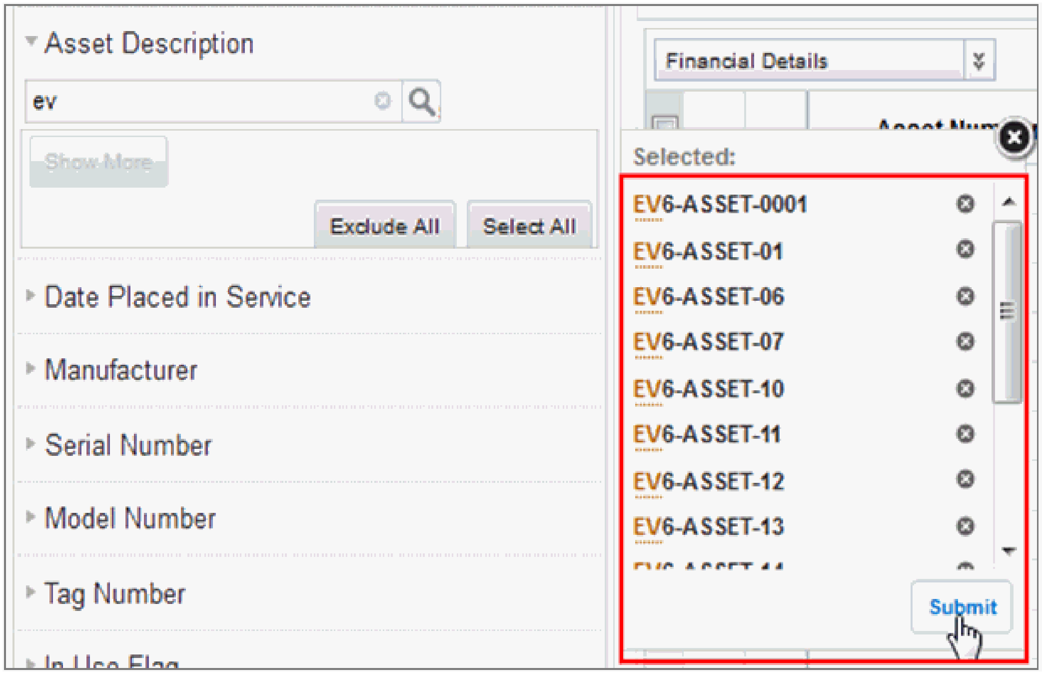


3.4 Select All

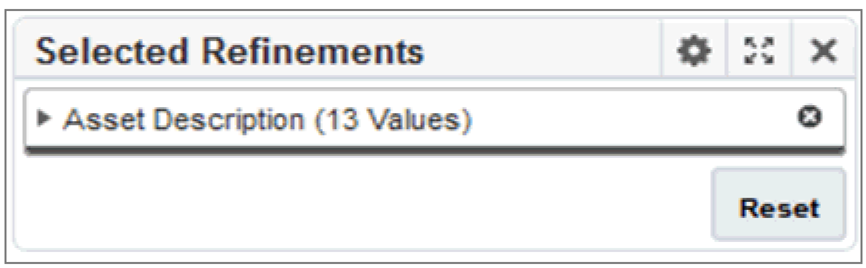
Change the behavior of 'Select All' functionality to be the same as 'Exclude All'.



The 'Select ALL' button allows you to apply all values of the attribute as refinements.



You can capture all matches regardless of how many display on the UI, and you are not required to click on show more to capture the whole list for additional refinement.



D

Search Audit

This appendix covers the following topics:

- Search Audit Overview
- Configuring Search Audit
- Configuring Portlet Types
- Enabling Search Audit

Search Audit Overview

Data analysts can use Search Audit to track and monitor all searches conducted by end users. Search Audit also allows the data analyst to engage and access specific or key searches.

Search Audit offers a unique insight into the methods and interactions that end users are using in the Advanced Search features in Oracle E-Business Suite Information Discovery. Measurable and actionable search information is immediately available.

With traditional search capabilities, data only leads to reactive responses. Search Audit allows you to identify and view trends and issues in real time, enabling you to make proactive choices and business decisions. Search Audit features include:

- Searching, identifying, and engaging with end user searching.
- Storing searched keywords that are entered into the search box component.
- Storing the number of search results for each component.
- Storing some metadata regarding a search, such as user name, search time, data domain, application, and page name.
- Storing search type (value or record search).
- Search Audit is configurable for each data domain.

Search Audit contains the following seeded components:

- Data Domain
- Application
- Page
- EBS Functions

Configuring Search Audit

Administrators access the Search Audit seed page from the Information Discovery Administrator responsibility. The Search Analytics feature is disabled by default.

To enable search analytics:

1. Edit portal-ex portal-ext.properties
2. Edit the following properties as follows:
   - searchaudit.enable=true
   - searchaudit.datadomains=<data domain>
   - searchaudit.portlets= endecasummarizationbarportlet, endecatagcloudportlet

```
        # Uncomment the following properties to enable clustering
        # Note: Clustering will not work with Hypersonic.  Config
        #net.sf.ehcache.configurationResourceName=/ehcache/hibern
        #ehcache.multi.vm.config.location=/ehcache/liferay-multi-
        #org.quartz.jobStore.isClustered=true

##
## Weblogic
##
    layout.guest.show.max.icon=true
    # Specify a directory where Liferay will deploy processed plu
    # From this directory, Weblogic users will deploy WARs as mod
    # Latitude Studio enterprise application.
    auto.deploy.dest.dir=${eid.studio.home}/weblogic-deploy
#locales=de_DE, en_US, es_ES, fr_FR, it_IT, ja_JP, ko_KR, pt_PT,
locales=en_US, zh_CN, zh_TW, cs_CZ, nl_NL, fr_FR, fr_CA, de_DE, e
SE,th_TH, tr_TR, ar_AE, hr_HR, sr_RS, da_DK, fi_FI, iw_IL, sh_RS,
searchaudit.enable=true
searchaudit.datadomains=icx-iproc, eam
searchaudit.portlets=all
"/u01/Oracle/Middleware/user_projects/domains/portal-ext.properti
```

Configuring Portlet Types

You must configure the following portlets:

- endecasummarizationbarportlet
- endecachartportle
- endecaEBSresultsgridportlet
- endecanavigationportlet
- endecaresultstableportlet
- endecatagcloudportlet
- endecasearchboxportlet
- endecabreadcrumbsportlet

Enabling Search Audit

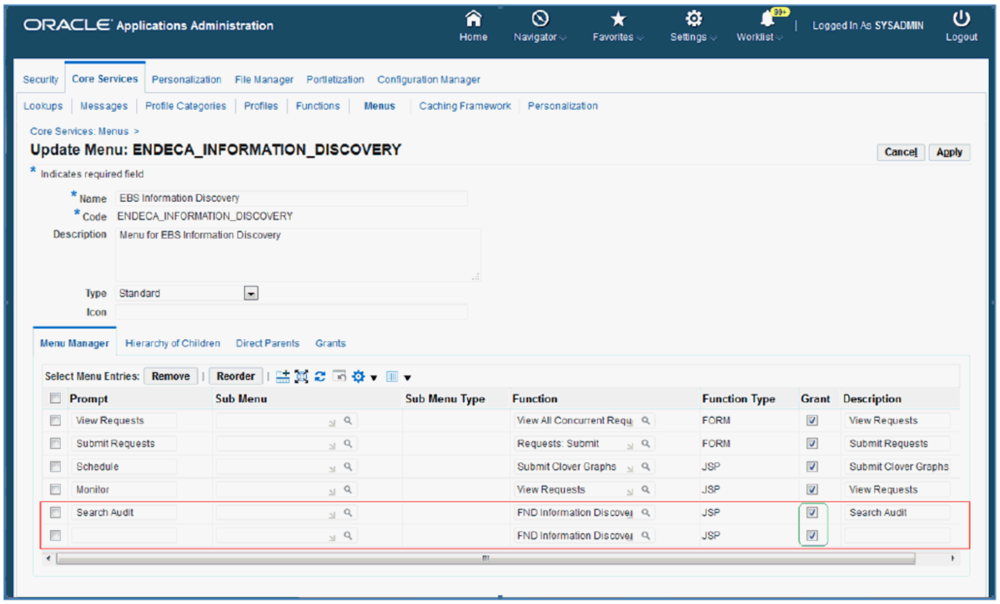
You must assign the Search Audit function to the main menu of the Information Discovery Administrator responsibility.

(N) Functional Administration > Core services (Tab) > Menus (Tab)

To enable Search Audit functions:

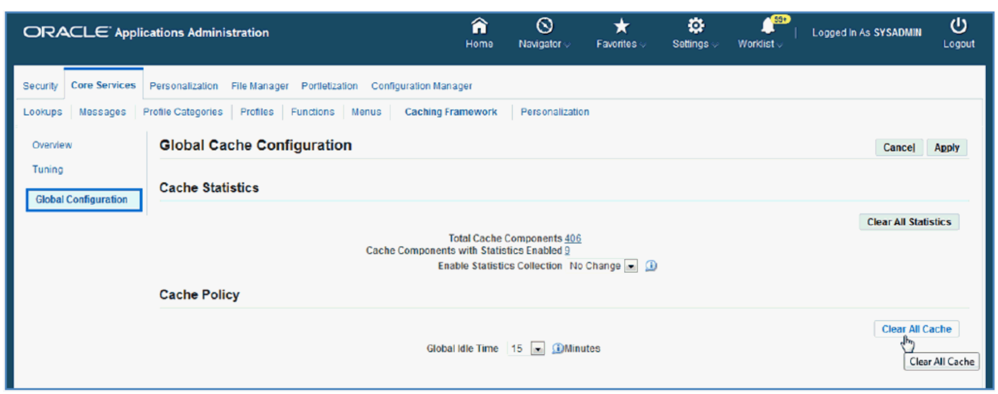
1. Add Search Audit functions and grant the added functions by selecting the 'Grant' check box.

2. Select 'Apply'.



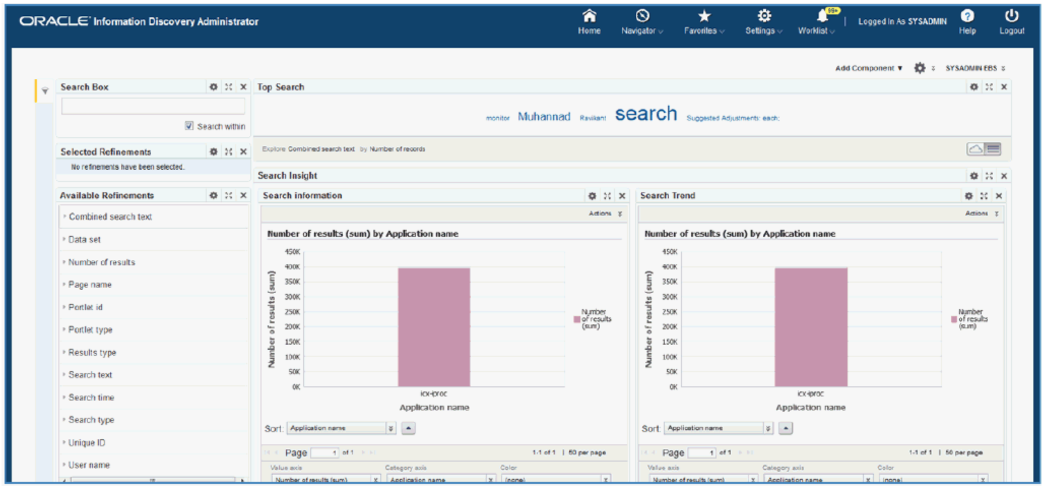
3. Navigate to Caching Framework > Global Configuration.

4. Select the 'Clear All Cache' button.



5. Navigate to the home page:

   (N) Information Discovery Administrator > Search Audit


ORACLE Information Discovery Administrator
Home
Navigator
Favorites
Settings
Worklist
Logged In As SYSADMIN
Help
Logout
Add Component
SYSADMIN EBS
Search Box
Search within
Top Search
monitor
Muhannad
search
Selected Refinements
No refinements have been selected.
Search Insight
Available Refinements
Combined search text
Data set
Number of results
Page name
Portlet id
Portlet type
Results type
Search text
Search time
Search type
Unique ID
User name
Search information
Search Trend
Actions
Number of results (sum) by Application name
Number of results (sum)
Application name
Sort
Page
Value axis
Category axis
Color

Index

D

E

F

G

H

I

J

L

M

O

Q

R