

Oracle® Financial Management Analytics

Administrator's Guide

Release 11.1.2.1

Oracle Financial Management Analytics Administrator's Guide, 11.1.2.1

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Contents

Documentation Accessibility	5
Chapter 1. Overview	7
Administrative Tasks	7
Accessing Help for Oracle Financial Management Analytics	8
Related Documentation	9
Chapter 2. Managing Security and Authorizing Users	11
User Authorization	11
Security on Applications and Data	12
Setting up Single Sign-on using CSS Token for external user directories	13
Chapter 3. Understanding the Product Architecture	17
Introduction to the Architecture	17
Oracle BI Repository (RPD)	20
Physical Layer	20
Business Model and Mapping Layer	22
Presentation Layer	22
Oracle BI Presentation Catalog	23
Merging Repositories	23
Chapter 4. Setting Up Hardware and Software Prerequisites	27
Authorization for Oracle Financial Management Analytics Administrator	27
System and Hardware Prerequisites	27
Software Prerequisites	28
Supported Components	28
Chapter 5. Installing Oracle Financial Management Analytics	31
Default Installation Path	32
Performing a Complete Oracle Financial Management Analytics Installation	32
Performing a Custom Oracle Financial Management Analytics Installation	37
Uninstalling Oracle Financial Management Analytics	42
Setting the Application Language	43

Chapter 6. Configuring Oracle Financial Management Analytics	47
Making Selections in the Configuration Utility	47
Configuration Checklist	48
Running the Configuration Utility	49
Performing Manual Configuration Steps	62
Setting the Connection Pool Parameters	62
Setting the Financial Management Application Name in the RPD File	66
Renaming Custom Dimensions	66
Setting Default Members in the RPD File	69
Creating the FCM_OFMA Table for Financial Close Management for Oracle Databases Only	70
Setting Financial Close Management Views on Oracle Databases Only	71
Restarting Oracle BI EE Manually	74
Chapter 7. Launching Oracle Financial Management Analytics	77
Chapter 8. Customizing Oracle Financial Management Analytics	79
Scaling Financial Values	79
Sorting Columns	80
Setting Number of Days on Process Management Report	81
Formatting Conditions on the Close Schedule Summary	83
Changing Report Names	84
Adding Company Logo	85
Hiding Dashboard Reports	85
Appendix A. Performance Tuning	87
Performance Tuning Documentation	87
Setting Caching for a Single BI Server	88
Setting Caches for a Clustered Environment	89
Turning Logging Off	90
Glossary	93
Index	103

Documentation Accessibility

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In This Chapter

Administrative Tasks	7
Accessing Help for Oracle Financial Management Analytics	8
Related Documentation	9

Oracle Financial Management Analytics provides executive access to a unified financial and nonfinancial picture of the performance of the organization through a series of dashboards.

Prebuilt analytics display key performance indicators, Financial Close Process status and other metrics using consolidated data from existing Oracle Hyperion Financial Management and Oracle Hyperion Financial Close Management applications. The dashboards enable users to analyze the data in an accessible format, according to various business-financial scenarios.

The Configuration Utility enables users to map application metadata to the predefined dashboards. The configuration utility also takes care of integration between the EPM applications and Oracle Business Intelligence Enterprise Edition. Security is managed in Weblogic, and the security access right for the Financial Management application is honoured in Oracle Financial Management Analytics.

The *Oracle Financial Management Analytics Administrator's Guide* provides detailed information on installing and configuring Oracle Financial Management Analytics.

For information on dashboards and reports, and on using the Oracle Financial Management Analytics, see the *Oracle Financial Management Analytics User's Guide*.

Administrative Tasks

The Oracle Financial Management Analytics Administrator (*admin*) is the user who is provisioned with administrative rights for both Oracle BI EE and Financial Management. The administrator is able to perform the following tasks:

- Install Oracle Financial Management Analytics. See [Chapter 5, “Installing Oracle Financial Management Analytics.”](#)
- Configure Oracle Financial Management Analytics, and map accounts. See [Chapter 6, “Configuring Oracle Financial Management Analytics.”](#)
- Customize dashboards to maximize their usability. See [Chapter 8, “Customizing Oracle Financial Management Analytics.”](#)

Accessing Help for Oracle Financial Management Analytics

With this release of Oracle Financial Management Analytics, you can access help for both the Oracle Financial Management Analytics User's and Administrator's Guide through several locations:

- From the Start Menu
- From the POV Selector in the application
- From Enterprise Performance Management System Release 11.1.2.1 Documentation Library

Caution! The Help menu on the Oracle BI EE Global Header displays only Oracle BI EE help and documentation.

No matter which selection method you use, in each instance you are directed to the EPM System Release 11.1.2.1 Documentation Library on the Oracle Technical Network (OTN) at http://download.oracle.com/docs/cd/E17236_01/index.htm.

The following documentation is available in PDF, HTML or MOBI (Kindle) formats:

- *Oracle Financial Management Analytics Administrator's Guide*
- *Oracle Financial Management Analytics User's Guide*

Note: To access documentation for Oracle BI EE, see the Oracle Business Intelligence Suite Enterprise Edition Documentation Library at http://download.oracle.com/docs/cd/E10415_01/doc/nav/portal_booklist.htm.

► To access documentation from the EPM System Release 11.1.2.1 Documentation Library:

1 Select **Help** from one of the following locations:

- From the main menu, select **Start**, then **All Programs**, then **Oracle Financial Management Analytics**, and then the **Admin Guide** or **User Guide**.
- In the POV Selector column in the application, click **Help**.
- From a Web browser, enter the following URL: http://download.oracle.com/docs/cd/E17236_01/index.htm

In each instance, the EPM System Release 11.1.2.1 Documentation Library on OTN is displayed.

2 In the left pane, select the **Financial PM Applications** tab.

3 In the right pane, scroll down to **Oracle Financial Management Analytics**.

4 Beside the document that you want to view, select the required format:

- PDF

- HTML
- MOBI (for viewing on Kindle)

Related Documentation

Oracle Financial Management Analytics is built on top of existing Oracle BI EE functionality to perform many tasks, such as managing repositories and catalogs. To minimize repetition of information and to maintain the accuracy of related information, cross-references are made to existing Oracle BI EE and Financial Management documentation. For a list of related documentation, see [Table 1, “Related OBIEE Documentation”](#).

- To access the Oracle Business Intelligence Suite Enterprise Edition Documentation Library, go to http://download.oracle.com/docs/cd/E10415_01/doc/nav/portal_booklist.htm.
- To access the Oracle Enterprise Performance Management System Documentation Library, go to <http://www.oracle.com/technetwork/middleware/performance-management/documentation/index.html>.

Table 1 Related OBIEE Documentation

Product	Document	Product or Task
Oracle Enterprise Performance Management System	<i>Oracle® Hyperion Enterprise Performance Management System Installation and Configuration Guide</i>	For information on installing and configuring EPM System products
	<i>Oracle® Hyperion Enterprise Performance Management System User and Role Security Guide</i>	For information about the following topics: <ul style="list-style-type: none"> • Setting up and managing user provisioning and security roles <p>Note: All authorized users for Oracle Financial Management Analytics must have the appropriate permissions for Financial Management and Financial Close Management.</p> <ul style="list-style-type: none"> • For technical information regarding security, such as SSL, Single Sign-On (SSO), security agents and custom login
Oracle Financial Management Analytics	<i>Oracle® Financial Management Analytics User's Guide</i>	For information about using Oracle Financial Management Analytics reports
Financial Management	<i>Oracle Hyperion Financial Management User's Guide</i>	For information about using Financial Management
	<i>Oracle Hyperion Financial Management Administrator's Guide</i>	For information about setting up and administering Financial Management

Product	Document	Product or Task
Oracle Fusion Middleware	<i>Oracle® Fusion Middleware Concepts Guide</i>	For information about Oracle BI Analysis
	<i>Oracle® Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition</i>	For detailed information on creating and maintaining the presentation layer, and using the Expression Builder to map financial accounts
	<i>Oracle® Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition</i>	For detailed information on the <code>NQSConfig.ini</code> File configuration settings, and the BI Administration Tool
	<i>Oracle® Fusion Middleware Developer's Guide for Oracle Business Intelligence Enterprise Edition</i>	For information on BI Presentation Services and BI Server
	<i>Oracle® Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition</i>	For information on setting up single sign-on (SSO) and other security settings that are defined in the OBIEE guide
Oracle BI EE	<i>Oracle Business Intelligence Presentation Services Administration Guide</i>	For information about the Oracle BI Presentation Catalog

2

Managing Security and Authorizing Users

In This Chapter

User Authorization	11
Security on Applications and Data	12
Setting up Single Sign-on using CSS Token for external user directories	13

Security and user authorization are not set up in Oracle Financial Management Analytics, but are acknowledged for existing authorizations in related products:

- User authorization is set up using Oracle BI EE administration.
- User roles and security access rights are defined in Oracle Hyperion Shared Services for Financial Management and Financial Close Management. These security access rights are respected by Oracle Financial Management Analytics.

Only the assigned administrator (*admin*) can create or modify dashboards.

Note: If you log in directly to Oracle Financial Management Analytics, you cannot launch Financial Management from the dashboard.

See these sections:

- [“User Authorization” on page 11](#)
- [“Security on Applications and Data” on page 12](#)

User Authorization

Single sign-on (SSO) for Oracle Financial Management Analytics is implemented through Oracle BI EE, but authorization is through Financial Management. Oracle BI EE and Shared Services must be connected to the same LDAP/MSAD store; otherwise, users do not match.

User provisioning is set through Shared Services. See the *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*.

For information on setting up single sign-on (SSO) and other security settings, see the *Oracle® Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition*.

When Oracle Financial Management Analytics is launched, the credentials are verified on the LDAP/MSAD store. The single sign-on token is generated and passed through the ADM Driver to Financial Management.

When you provide the connection URL in the repository (RPD) file, you must enter a valid Shared Services user name. That user must be provisioned for the Financial Management application only if they plan to use shared logon. The user who logs into Oracle BI EE, is the user whose credentials are used to query Financial Management.

The user must have permission to view the reports, as shown below:

- For all Oracle Financial Management Analytics, except the Close Schedule Summary, use the Financial Management user ID.
- For the Close Schedule Summary only, use the Financial Close Management database schema user with at least view rights.

For additional information on setting and managing security, see the following guides:

- *Oracle® Fusion Middleware Security Guide for Oracle Business Intelligence Enterprise Edition*
- *Oracle Hyperion Enterprise Performance Management System User and Role Security Guide*
- *Oracle Hyperion Enterprise Performance Management System Security Administration Guide*

Security on Applications and Data

Security on Financial Management applications and data is set through Financial Management using specific security classes and security class access. When an Oracle Financial Management Analytics user accesses Financial Management data in the reports, the data security settings for the application are respected.

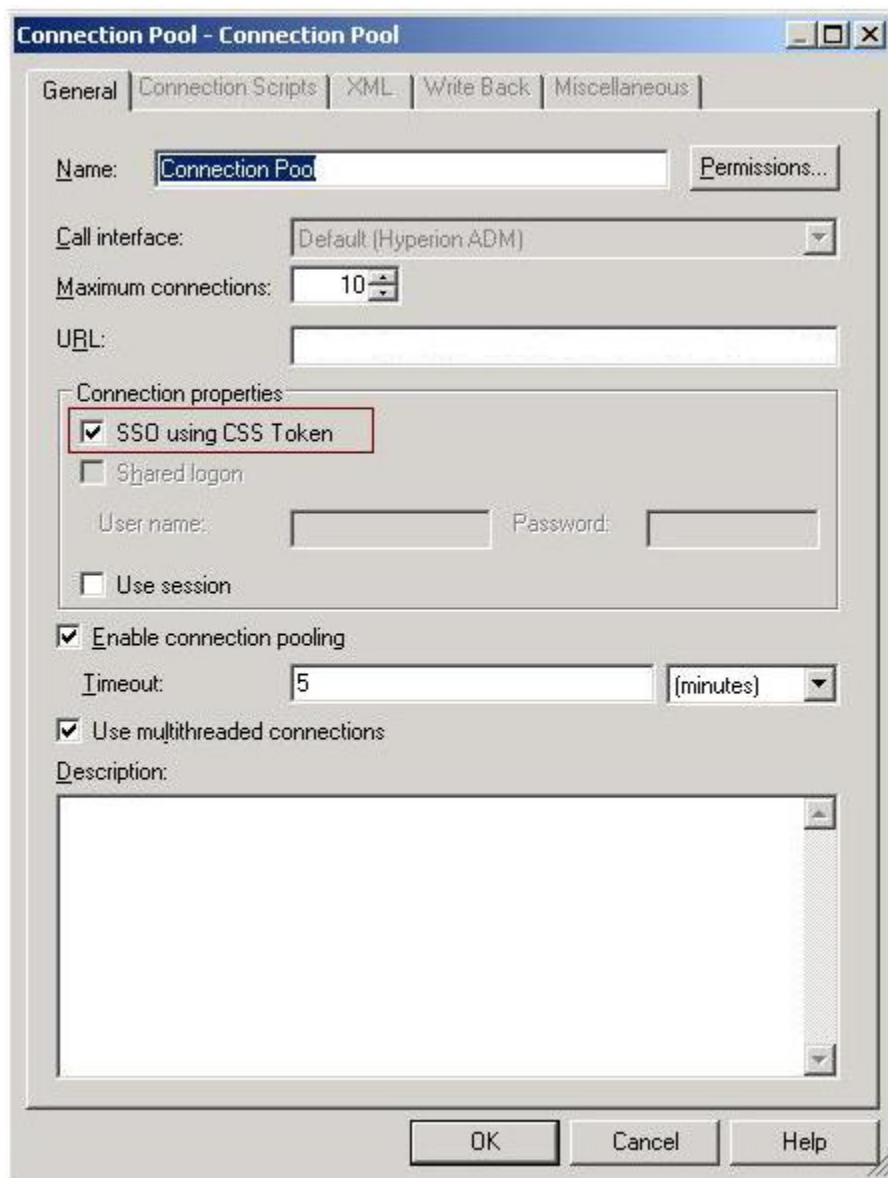
For example, if a user viewing the dashboards has Financial Management access to the East entities but not the West entities, that user would not be able to see the data for the West entities, even within Oracle Financial Management Analytics.

Note: During configuration, it is important to specify a Financial Management admin user whose credentials enable access to the entire application.

The language preference selected in Financial Management are reflected in Oracle Financial Management Analytics. For example, if German is selected as the Financial Management locale, users see member descriptions in German.

Setting up Single Sign-on using CSS Token for external user directories

- To set up Single Sign-on using CSS Token for external user directories (LDAP\MSAD), perform the following:
- 1 Oracle BI EE and Shared Services must be connected to the same LDAP or MSAD store.
- 2 Open online rpd and go to HFM-Connection pool. Select the **SSO using CSS Token** and restart BI server.



- 3 Run the following command from Oracle BI EE installation path to set the CSS backward compatibility tag to true in OBIEE 11.1.1.5

For example: C:\OBIEE\instances\instance1\config\foundation\11.1.2.0>
epmsys_registry.bat updateproperty SHARED_SERVICES_PRODUCT/
@COMPATIBILITY 11120

Note: If you are using EPM 11.1.2.x, then the compatibility setting is NOT required.

- 4 Download the `regSyncUtil_OBIEE-TO-EPM.zip` From details in bug 11725145. Unzip the utility and follow the instructions in the readme to run the utility.

Note: This syncing of keys in the registry is only required when using EPM 11.1.2.x

- 5 You need to perform the following additional steps, if you are using the external user directory as MSAD:

- a. IdentityAssertion Permission needs to be granted to `css.jar`, steps for which are

- i. Confirm that BI Domain, mainly Admin Server is up and running
- ii. run `wlst.sh` or `wlst.cmd` available at `$MW_HOME/oracle_common/common/bin`
- iii. execute WLST connect command as shown below:

```
connect ("<WLS_ADMIN_USERNAME>", "<WLS_ADMIN_PASSWORD>", "t3://<HOSTNAME>:<ADMIN_PORT>").
```

For example: `wls:/offline>`

```
connect ("Administrator", "Admin123", "t3://localhost:7001")
```

- iv. execute WLST runtime command as shown below:

```
runtime().
```

For example: `wls:/bifoundation_domain/serverConfig> runtime()`

- v. execute WLST grantPermission command as shown below:

```
grantPermission(codeBaseURL="file:${hyperion.home}/common/CSS/11.1.2.0/lib/css.jar", permClass="oracle.security.jps.JpsPermission", permTarget="IdentityAssertion").
```

For example: `wls:/bifoundation_domain/`

```
runtime>grantPermission(codeBaseURL="file:${hyperion.home}/common/CSS/11.1.2.0/lib/css.jar", permClass="oracle.security.jps.JpsPermission", permTarget="IdentityAssertion")
```

After successfully executing the `grantPermission()` command, the following information is displayed: Location changed to domainRuntime tree. This is a read-only tree with DomainMBean as the root. For more help, use `help(domainRuntime)`.

If the IdentityAssertion Permission has already been granted to `css.jar`, after executing the above commands, the confirmation message is displayed.

- b. Shutdown BI Domain including Admin Server and Managed Server(s) and any dependent OPMN Processes.
- c. Download 13059356.zip from bug 13059356 and extract the zipped file to the following location: `%BI_ORACLE_HOME%/OPatch/`

- d. Make sure %BI_ORACLE_HOME% has oraInst.Loc file. If it does not, browse to %BI_ORACLE_HOME%\bifoundation\provision\scripts\bidomain\inst and copy the oraInst-template.Loc to the %BI_ORACLE_HOME% location and rename it to oraInst.Loc
- e. Invoke command prompt and change directory to %BI_ORACLE_HOME%\OPatch folder. Apply OPatch using following opatch command: `opatch apply 13059356 -oh %BI_ORACLE_HOME% -jdk %BI_ORACLE_HOME%\jdk -invPtrLoc %BI_ORACLE_HOME%\oraInst.loc`

A message displays the patch is applied successfully.

In case the above command does not work, and if any errors is displayed with the following message: The response file for OCM configuration does not exist (or) is not readable. Please provide a valid response file. Please perform the following:

Run the following command: `%ORACLE_HOME%\ccr\bin\emocmrsp.bat -no_banner -output c:\out.rsp` and then run the opatch command: `opatch apply 13059356 -oh "c:\obiee\oracle_bil" -ocmrf c:\out.rsp -jdk "c:\obiee\oracle_bil\jdk" -invPtrLoc "c:\obiee\oracle_bil\oraInst.loc"`

Note: The opatch must be applied successfully.

Note: If the external directory is used as MSAD, then the above steps are additional requirements.

6 While configuring external user directory in OBIEE, if the “virtualize” property is set to true in the jps-config.xml file (<BI_DOMAIN_HOME>/config/fmwconfig/jps-config.xml), then perform the following:

- Edit the setDomainEnv.cmd. From the following path: <BI_DOMAIN_HOME>/bin/ and add the following command lines:

```
Set EXTRA_JAVA_PROPERTIES=-Dcommon.components.home=
%COMMON_COMPONENTS_HOME% -Didstore.identityAttribute=objectguid
%EXTRA_JAVA_PROPERTIES% export EXTRA_JAVA_PROPERTIES
```

- Based on the type of External user directory configured, the value of Didstore.identityAttribute needs to be set differently as shown below:

Microsoft Active Directory = objectguid

Oracle Internet Directory | Oracle Virtual Directory = orclguid

Novell EDirectory = guid

Sun One Directory = nsuniqueid

Open Ldap = entryuuid

7 If while configuring external user directory in OBIEE, if the “virtualize” property is set to false in the jps-config.xml file (<BI_DOMAIN_HOME>/config/fmwconfig/jps-config.xml), then perform the following:

- If only one External User directory is configured with default Unique Identity Attribute, as Authentication Provider in WLS Security Realm and ordered it as First provider in the stack, NO further action is required. In this case following DIRECTORY_TYPE=IDENTITY_ATTRIBUTE is used

Microsoft Active Directory = objectguid

Oracle Internet Directory | Oracle Virtual Directory = orclguid

Novell EDirectory = guid

Sun One Directory = nsuniqueid

Open Ldap = entryuuid

- If External LDAP User Directory Authentication Provider in WLS Security Realm is configured to use Unique Identity Attribute different from above defaults, it should pass the Java System Property, `idstore.identityAttribute`, in BI Domain's `setDomainEnv.sh` file available at `<BI_DOMAIN_HOME>/bin/`

For example: `set EXTRA_JAVA_PROPERTIES= -Dcommon.components.home=%COMMON_COMPONENTS_HOME% -Didstore.identityAttribute=customguid`
`%EXTRA_JAVA_PROPERTIES% export EXTRA_JAVA_PROPERTIES`

- 8** Restart BI Domain including Admin Server and Managed Server(s).
- 9** Restart OPMN Processes dependent on Admin or Managed Server(s).
- 10** Login using the external directory user credential to Oracle Financial Management Analytics and the user can view the dashboards.



Understanding the Product Architecture

In This Chapter

Introduction to the Architecture.....	17
Oracle BI Repository (RPD).....	20
Oracle BI Presentation Catalog	23
Merging Repositories	23

Introduction to the Architecture

The integration between Financial Management and Oracle BI EE is managed through the Financial Management ADM Driver, requiring that the following components be installed on the BI Server:

- Oracle BI EE 11g and its components
- Financial Management Client
- Financial Management ADM Client

Note: For a complete list of components and the supported releases, see [Chapter 4, “Setting Up Hardware and Software Prerequisites”](#).

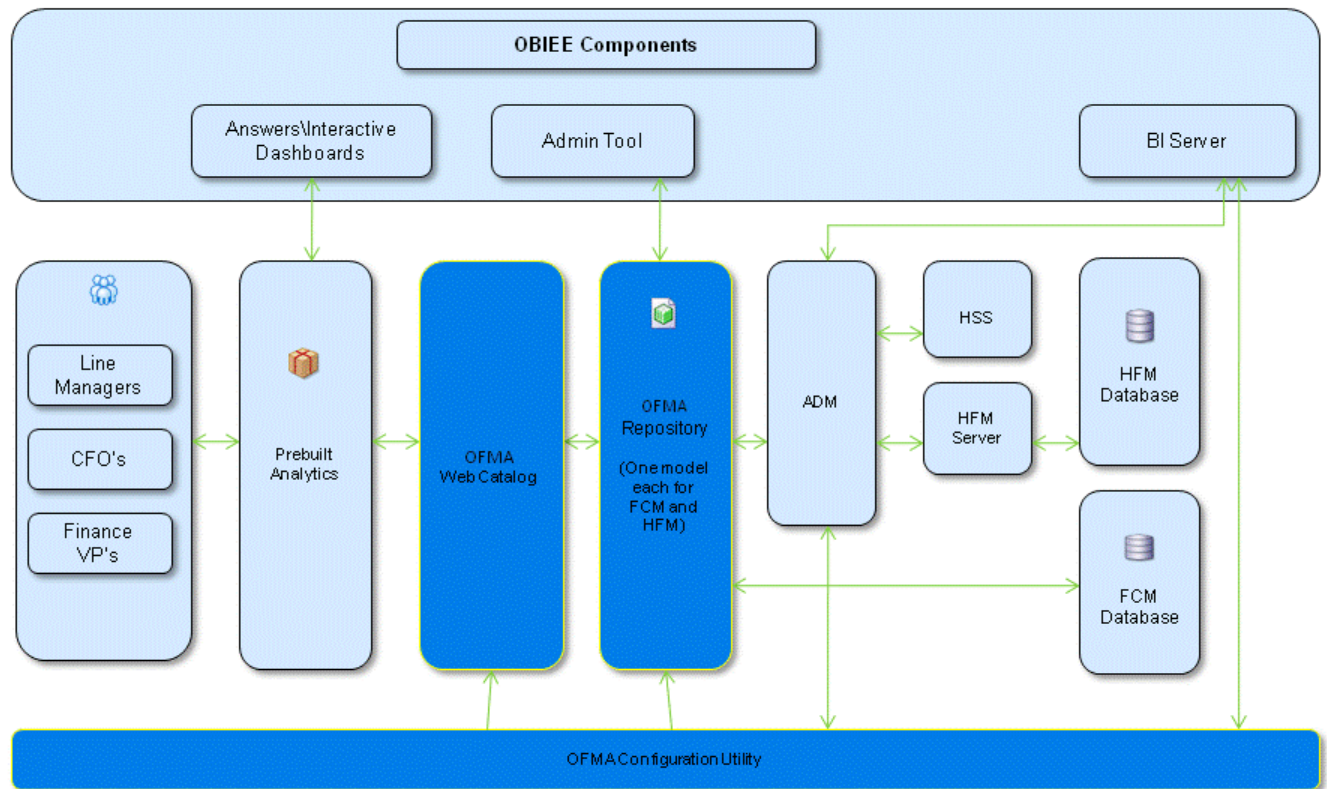


Table 2 Oracle Financial Management Analytics Components

Component	Description	Related Documentation
Database	For Financial Management, the database can be any relational database (Oracle, SQL Server, and so on) supported by Financial Management. or Financial Close Management. For Financial Close Management, only Oracle databases are supported.	See the associated database documentation.
Financial Management (HFM) and the Financial Management Client	Financial Management provides a unified view of enterprise financial information and consolidates key performance and operating metrics from global sources. The HFM client tier contains the user interface and has the ability to communicate with the application tier. You can display data and metadata, and enter data in this tier.	See the following documentation: <ul style="list-style-type: none"> ● <i>Oracle Hyperion Financial Management User's Guide</i> ● <i>Oracle Hyperion Financial Management Administrator's Guide</i>

Component	Description	Related Documentation
Financial Management Analytic Data Modeling (ADM) Driver	<p>Data sources are accessed by ADM drivers, which are components that map the data source's characteristics to the generic ADM model.</p> <p>The ADM driver is used to create the connection with the Oracle BI server and enable all data access and retrieval operations, such as authentication and authorization.</p>	<i>Oracle® Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition</i>
Financial Close Management	<p>Financial Close Management helps companies define, execute, and report on the interdependent activities of a financial close period. It provides centralized monitoring of all close process tasks, and provides a visible, automated, repeatable system of record for running close processes.</p> <p>Information from Financial Close Management is used for the Close Schedule Summary and Schedule Comparison reports. The dashboard displays the following reports:</p> <ul style="list-style-type: none"> ● Schedule Summary and Trend ● Schedule Milestones and Roadblocks 	<p>See the following documentation:</p> <ul style="list-style-type: none"> ● <i>Oracle® Financial Close Management User's Guide</i> ● <i>Oracle® Financial Close Management Administrator's Guide</i>
Oracle BI EE	<p>Oracle BI EE provides a full range of business intelligence capabilities that enable you to collect up-to-date data from your organization, present the data in easy-to-understand formats (such as tables and graphs), and deliver the data in a timely fashion to the employees in your organization.</p> <p>The following Oracle BI EE components are used:</p> <ul style="list-style-type: none"> ● BI Server: The Oracle BI Analytics server provides an advanced calculation and integration engine and is used to process user requests and query underlying data sources. ● BI Administration Tool: Used to make the connection to the data source and to create the Repository file (RPD). The administration tool contains three layers: <ul style="list-style-type: none"> ○ Physical Layer ○ Business Model and Mapping Layer ○ Presentation Layer. ● BI Presentation Services: Used to create Ad-Hoc Analytics (Analysis) and Interactive Dashboards. 	<p>See the following documentation:</p> <ul style="list-style-type: none"> ● For BI Server, see <i>Oracle® Fusion Middleware Integrator's Guide for Oracle Business Intelligence Enterprise Edition</i> ● For BI Administration Tool, see the <i>Oracle® Fusion Middleware Administrator's Guide</i> ● For BI Presentation Services, see the <i>Oracle® Fusion Middleware Developer's Guide for Oracle Business Intelligence Enterprise Edition</i>
Oracle BI Presentation Catalog, or Web Catalog	<p>Stores the application dashboards and report definitions, and contains information about permissions and accessibility of the dashboards by group.</p> <p>See "Oracle BI Presentation Catalog" on page 23.</p>	<i>Oracle® Business Intelligence Presentation Services Administration Guide</i>
Shared Services (HSS)	<p>All authorized users for Oracle Financial Management Analytics must have the appropriate permissions for Financial Management.</p> <p>User provisioning and data authorization are managed through Financial Management using Shared Services.</p>	<i>Oracle® Hyperion Enterprise Performance Management System User and Role Security Guide</i>
Oracle Financial Management Analytics	Displays the Financial Management and Financial Close Management data in the dashboards.	<i>Oracle® Financial Management Analytics User's Guide</i>

Oracle BI Repository (RPD)

The Oracle BI Repository (RPD file) is a file that stores BI Server metadata. The metadata define logical schemas, physical schemas, physical-to-logical mappings, aggregate table navigation, and other constructs. You can edit Oracle BI repositories using the Oracle BI Administration Tool.

For Oracle Financial Management Analytics, the `FinancialManagementAnalytics.rpd` is created when the product is installed. The default password is `welcome1`.

Three layers in the Oracle BI Administration Tool are used to manage the Oracle Financial Management Analytics dashboards:

- [“Physical Layer” on page 20](#)
- [“Presentation Layer” on page 22](#)
- [“Business Model and Mapping Layer” on page 22](#)

Each time you save the repository, a dialog asks if you want to check global consistency. You should check the consistency of the repository file. The following known warning messages may be displayed, but do not require any action: For information about global consistency checks, see the *Oracle® Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition*.

- The features in Database “HFM” do not match the defaults. This can cause query problems.
- The features in Database “FCM” do not match the defaults. This can cause query problems.

For additional information about the Repository file, see the *Oracle Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition*.

Physical Layer

The Physical layer in the `FinancialManagementAnalytics.rpd` is created when the import from Financial Management or Financial Close Management is completed. The default password is `welcome1`. You must change this password before configuring the application. See [“Running the Configuration Utility” on page 49](#).

The Physical layer in the Oracle BI Repository defines the data sources to which the BI Server submits queries, and the relationships between physical databases and other data sources that are used to process multiple data source queries. Each physical hierarchy within a physical dimension contains the columns from the Physical database, or cube.

The `FinancialManagementAnalytics.rpd` has two data sources that define the data and metadata: one for Financial Management and one for Financial Close Management.

The Financial Management datasource includes the following elements in the Physical Layer:

- [“Standard Financial Management Dimensions” on page 21](#)
- [“Member Properties” on page 21](#)

The Financial Close Management datasource has the required tables from the Financial Close Management database.

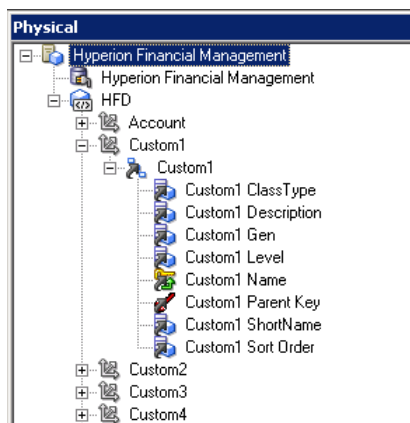
Standard Financial Management Dimensions

The dimensions from the Financial Management or Financial Close Management applications are directly available in the Physical Layer.

All standard Financial Management databases or cubes contain the following standard dimensions:

- Scenario
- Year
- Period
- Entity
- Value
- Account
- ICP (Intercompany)
- View
- Custom dimensions (1 to 4) with dimension names that can be customized.

Member Properties



The following Dimension members properties are available for each dimension in the Physical hierarchy:

- **ClassType** – This member is null for most dimensions except the Account dimension (ClassType=AccountMem).
- **Description** – This member provides an optional description of the member.
- **Gen** (Generation) – The generation number of the member defined as the depth of the member from the top of the hierarchy. The top members belong to generation 1. The children of the top members belong to generation 2, and so on.
- **Level** – Only two levels are available in Financial Management:
 - All leaf members belong to Level 0
 - All other members belong to Level 1

- **Name** – The unique member name.
- **Parent Key** – This member property is generated on top of Financial Management results and provides the Parent member name.
- **ShortName** – For most dimensions, the ShortName property contains the same value as Name.

One notable exception is the Entity dimension. In the entity dimension multiple members frequently share the same ShortName but have different values for Name because they roll up through different alternate hierarchies.

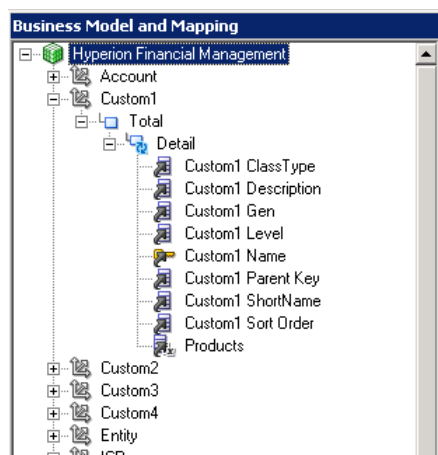
- **Sort Order** – The sort order provides the sort order for the member, and is generated on top of Financial Management results.

Business Model and Mapping Layer

The Business Model and Mapping layer (BMM) is a layer of the Oracle BI repository that defines the business, or logical, model of the data and specifies the mapping between the business model and the Physical layer schemas. This layer can contain one or more business models.

The Business Model and Mapping layer determines the analytic behavior that is seen by users and defines the set of objects available to users.

Logical tables exist in the Business Model and Mapping layer. The logical schema defined in each business model must contain at least two logical tables, and you must define relationships between them. Each logical table has one or more logical columns and one or more logical table sources associated with it.



For information on creating and managing the business model and mapping layer, see the *Oracle® Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition*.

Presentation Layer

The Presentation layer is where you create the customized, secure, role-based views of a business model to users.

Presentation layer views are called subject areas. A subject area can be identical to your business model, or you can provide smaller, role-based subject areas that show a single subject or that support a business role. By grouping various tables, columns, attributes, and so on to form the different subject areas, you can organize your content in a way that makes sense for your users.

The subject areas are available in the Presentation Services and in Answers, enabling users to create Analysis over the metadata. For additional information about analyses and Answers, see the *Oracle Business Intelligence Enterprise Edition*.

After you create the Business Model and Mapping layer, you can drag entire business models to the Presentation layer in the Administration Tool. Alternatively, you can create subject areas and other Presentation layer objects manually.

If you are using an existing Oracle BI Applications repository and have customized its content, you can perform a manual merge of the existing customized repository with the new Oracle Financial Management Analytics repository received with Oracle BI Applications. See [“Merging Repositories”](#) on page 23

For detailed information, see the *Oracle® Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition*.

Oracle BI Presentation Catalog

The Oracle BI Presentation Catalog, or Web catalog, stores the application dashboards and report definitions and contains information about permissions and accessibility of the dashboards by a group. For Oracle Financial Management Analytics, the catalog is in the `FinancialManagementAnalytics` folder.

The Oracle BI Presentation Catalog stores business intelligence objects and provides an interface where users create, access, and manage objects, and perform specific object-based tasks (for example, export, print, and edit). The catalog is organized into folders that are either shared or personal.

If Oracle BI EE is integrated with other Oracle applications, then the objects that are created within those applications are also stored within the catalog. For example, if Oracle BI Publisher is integrated with Oracle BI EE, data models, reports, and style templates and subtemplates are also stored in and accessible from the catalog.

Many operations that you can perform in the Oracle BI Presentation Catalog can also be performed in the Catalog Manager, which resides outside of Oracle BI Presentation Services. For more information about the Catalog Manager, see *Oracle Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition*.

Merging Repositories

When working with Oracle BI EE, although you can use many data sources, you can only have one repository file (RPD) loaded.

If you are using an existing repository and have customized its content, you can perform a manual merge of the customized repository with the new Oracle Financial Management Analytics repository.

To merge the repositories, you create a new blank repository, and merge both the existing repository and the new Oracle Financial Management Analytics repository into the new one.

► To merge an existing repository file (RPD) with the new Oracle Financial Management Analytics RPD:

1 Optional: Create a blank repository to serve as the original repository in the merge, if you do not already have one:

- a. In the Administration Tool, select **File**, then select **New Repository**.
The Create New Repository Wizard is displayed.
- b. Enter a name for the repository, such as `blank`. The file is saved with the `.rpd` file extension.
- c. For **Import Metadata**, select **No**.
- d. Enter and confirm the repository password to be used for this repository.
- e. Click **Finish**.

2 Close the blank repository.

3 Open the existing repository that contains the objects that you want to merge with the Oracle Financial Management Analytics repository.

4 From the Oracle BI EE Administration tool main menu, click **File, then **Merge**.**

The Merge Repositories wizard is displayed.

5 In the Select Input Files screen, for **Merge Type, select **Full Repository Merge**.**

6 Click **Select next to **Master Original Repository**.**

7 Navigate to the location of the new blank repository file as the original repository, and then click **Open. Enter and confirm the repository password created in [step 1](#).**

8 Click **Select next to **Modified Repository**.**

9 Navigate to the location of the modified repository file, and then click **Open. This is Oracle Financial Management Analytics repository into which you want to import objects from the existing repository.**

10 In the appropriate **Password field, enter the password for the modified repository.**

11 Optional: Click **Select next to the **Save merged repository as** field to change the default name and location of the saved (merged) file. Enter a new name and location.**

12 Click **Equalize during merge to maintain IDs during the merge operation, and then click **Save**.**

13 Click **Next.**

If there are any conflicts, the Define Merge Strategy screen of the Merge repository Wizard is displayed.

If there are no conflicts, the Merge Wizard continues automatically with the merge process, and then closes automatically when finished.

The Define Merge Strategy screen displays a decision table that shows conflicts for this merge.

- 14** From the **Decision List**, decide whether to include or exclude objects from the merged repository, and select **Current** or **Modified** .

When you select an object in the decision table, the read-only text box below the Decision Table describes what changes were made to that object in the current repository.

After you make a merge decision, the row for that decision in the table changes from red to black. When all rows have a value in the Decision field, the Finish button is enabled.

- 15** Click **Finish**.

For additional information about the merging repository files, see the *Oracle® Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition*.

4

Setting Up Hardware and Software Prerequisites

In This Chapter

Authorization for Oracle Financial Management Analytics Administrator	27
System and Hardware Prerequisites	27
Software Prerequisites	28
Supported Components	28

Authorization for Oracle Financial Management Analytics Administrator

Before you install Oracle Financial Management Analytics, ensure the Administrative user (*admin*) for Oracle Financial Management Analytics has the following authorization:

- Write access to the directory that will be used for the installation.
- Administrative rights to all associated software
- Administrative rights to the Financial Close Management database is required during configuration only.

System and Hardware Prerequisites

To run the installer on the target machine, one of the following compatible hardware systems must be available for the selected Financial Management version.

Table 3 Hardware Prerequisites

Financial Management Version	Operating System
9.3.3.1	<ul style="list-style-type: none">• Windows 2003, 32 bit
11.1.1.3.500, plus required Patch 12843958	<ul style="list-style-type: none">• Windows 2003, 32- or 64- bit
11.1.2.1, plus required Patch 11.1.2.1.102	<ul style="list-style-type: none">• Windows 2003, 32- or 64- bit• Windows 2008, 32- or 64- bit

Caution! See “Supported Components” on page 28 to determine whether additional patches may be required.

The installer checks the operating system of the target machines. If the hardware and system requirements are not met, the installation generates an error and cannot be completed.

Software Prerequisites

Before installing Oracle Financial Management Analytics, ensure that the following products are installed, configured, and available to the Oracle Financial Management Analytics administrator.

The following software must also be installed, configured, and available to the Oracle Financial Management Analytics Administrator, although it need not to be installed on the same system as Oracle Financial Management Analytics:

- Financial Close Management for the Close Schedule Summary dashboard only
- Administrative rights to the Financial Close Management database for Financial Close Management dashboards
- To enable Process Management Dashboards in this release, apply the following patches:
 - For Financial Management, version 11.1.2.1, apply required patch 11.1.2.1.102
 - For Financial Management, version 11.1.1.3.500, apply required patch 11.1.1.3.500_12843958
- Shared Services

Note: Ensure that you use the same version of Shared Services that you are using for Financial Management.

For a list of the appropriate versions, see [“Supported Components” on page 28](#).

Supported Components

Before installing Oracle Financial Management Analytics, ensure that the component products are installed, configured, and available to the Oracle Financial Management Analytics administrator. Some components must also be installed on the same system on which Oracle Financial Management Analytics is being installed, as noted on [Table 4, “Supported Components”](#).

The following components are supported for this release of Oracle Financial Management Analytics:

Table 4 Supported Components

Component	Supported Version
Install the following components on the same system on which Oracle Financial Management Analytics is being installed:	
Oracle BI EE 11g and its components	<ul style="list-style-type: none">● Release 11.1.1.5, plus required Patch 11.1.1.5.1 MLR

Component	Supported Version
Financial Close Management	<ul style="list-style-type: none"> ● Release 11.1.2.1 (Oracle Database Only)
Financial Management Client (HFM)	<ul style="list-style-type: none"> ● 11.1.1.3.500, plus required Patch 12843958 ● 11.1.2.1.000, plus required Patch 11.1.2.1.102 ● 9.3.3.1
Financial Management Client with ADM Driver	N/A

The following software must be installed, configured, and available to the Oracle Financial Management Analytics Administrator, although it does not need to be installed on the same system as Oracle Financial Management Analytics:

Financial Close Management For Close Schedule Summary dashboard only	11.1.2.1
Shared Services	<p>Oracle Enterprise Performance Management System-supported versions from Release 9.3.3 to Release 11.1.2.1.</p> <p>Note: Ensure that you use the same version of Shared Services that you are using for Financial Management.</p>

5

Installing Oracle Financial Management Analytics

In This Chapter

Default Installation Path.....	32
Performing a Complete Oracle Financial Management Analytics Installation	32
Performing a Custom Oracle Financial Management Analytics Installation	37
Uninstalling Oracle Financial Management Analytics.....	42
Setting the Application Language	43

Oracle Financial Management Analytics is installed as a separate product and installs the prebuilt dashboards.

A separate `setup.exe` file is available in your installation directory, depending on whether you are running a 32-bit or 64-bit version of the Windows operating system.

During installation, the Oracle Financial Management Analytics installer places the `FinancialManagementAnalytics.rpd` file (RPD) and the `FinancialManagementAnalytics` catalog folder containing the reports and dashboards into the relevant directories of Oracle Financial Management Analytics home. You may also perform a custom installation and select the components that you want to install.

After the installation, configure the product to reflect your custom applications, as outlined in [Chapter 6, “Configuring Oracle Financial Management Analytics.”](#)

For a description of each dashboard, see the *Oracle Financial Management Analytics User's Guide*.

See the following sections:

- “Default Installation Path” on page 32
- “Performing a Complete Oracle Financial Management Analytics Installation” on page 32
- “Performing a Custom Oracle Financial Management Analytics Installation” on page 37
- “Uninstalling Oracle Financial Management Analytics” on page 42
- “Setting the Application Language ” on page 43

Default Installation Path

During installation, the installer calculates which drive in the machine has the maximum amount of free space to set up the default Oracle Home location for Oracle Financial Management Analytics. That drive is used for the installation, and the default path is set as follows:

OFMAHome_(number of the previous installation of OFMA + 1)

For example, if the c drive contains the maximum free disk space, the default path is c :

\OFMAHome_1.

Performing a Complete Oracle Financial Management Analytics Installation

A complete installation of Oracle Financial Management Analytics installs the following components automatically:

- Oracle Financial Management Analytics Repository file - FinancialManagementAnalytics (RPD), which contains metadata, such as Subject Area, Metrics, and Dimensions.
- Catalog - FinancialManagementAnalytics folder, which contains Reports and Dashboards
- Configuration Utility

To perform a custom installation with selected components, see [“Performing a Custom Oracle Financial Management Analytics Installation” on page 37](#).

► To perform a complete installation of Oracle Financial Management Analytics:

1 Ensure that all system and software prerequisites are available. See the following sections:

- [“System and Hardware Prerequisites” on page 27](#)
- [“Software Prerequisites” on page 28](#)
- [“Supported Components” on page 28](#)

2 Ensure you have installed Oracle BI EE 11.1.1.5 plus the required Patch 11.1.1.5.1 MLR.

See [“Supported Components” on page 28](#).

3 **Optional:** If you plan to use the Process Management Dashboards, apply the following patches before beginning the installation:

- For Financial Management version 11.1.1.3.500, apply patch 12843958
- For Financial Management version 11.1.2.1.000, apply the patch set update release 11.1.2.1.102.

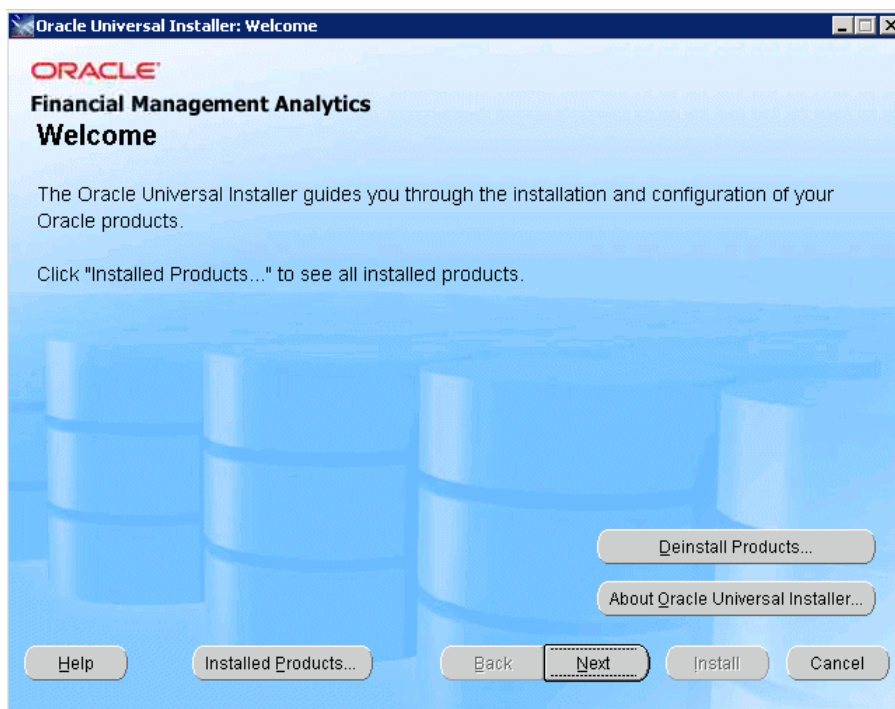
See [“Supported Components” on page 28](#).

4 Download the OFMA installer files from Oracle edelivery (<http://edelivery.oraclecorp.com/>).

- 5 From the installation directory, select the installation file, **setup.exe**, for your Microsoft Windows operating system:
 - 32-bit
 - 64-bit

Note: For the default installation path, see [“Default Installation Path” on page 32](#).

The Welcome screen of the Oracle Universal Installer (OUI) is displayed.

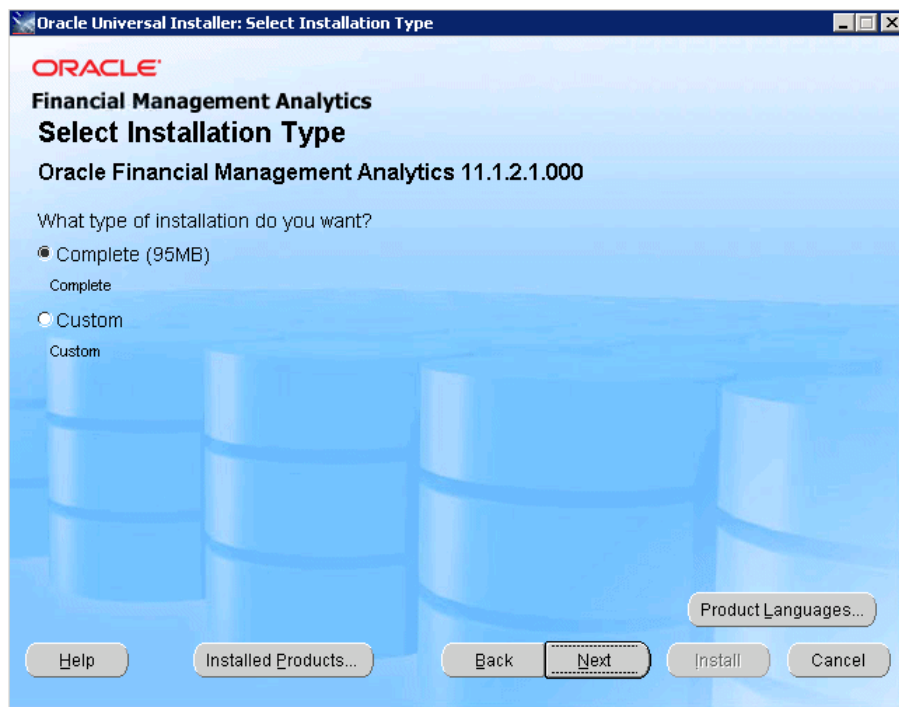


- 6 Click **Next**.
- 7 On the **Select Installation Type** screen, select **Complete**.

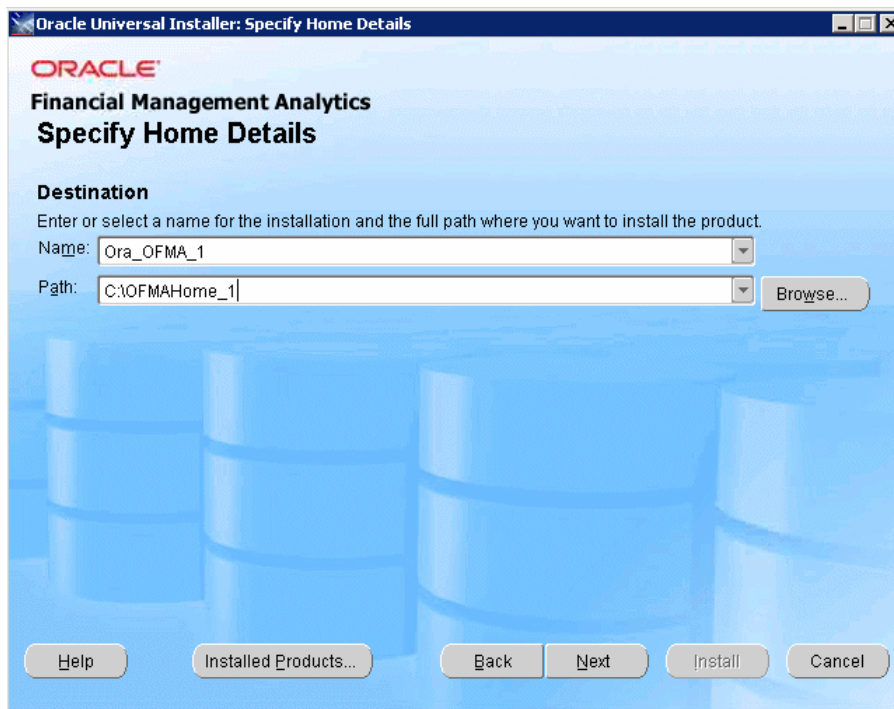
The complete installation automatically installs the following components of the application:

- Repository (.FinancialManagementAnalytics.rpd)
- Catalog - FinancialManagementAnalytics folder
- Configuration Utility

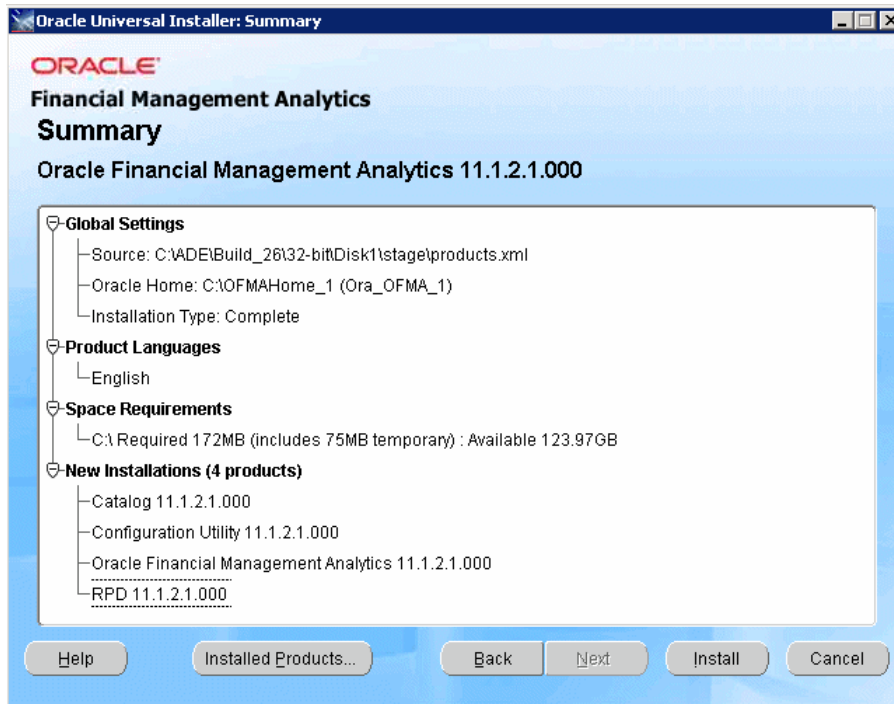
To perform a custom installation, see [“Performing a Custom Oracle Financial Management Analytics Installation” on page 37](#).



- 8 **Optional:** Click **Product Languages** to set the language in which you want to use the application. See [“Setting the Application Language ” on page 43.](#)
- 9 Click **Next**.
- 10 On the **Specify Home Details** screen, enter the details for the new installation:
 - Under **Name**, enter the name of the installation. By default, this is set as Ora_OFMA_x.
 - Under **Path**, enter the path, or browse to the location where Oracle Financial Management Analytics is to be installed. By default, this is located at C : \OFMAHome_x.



11 Click Next.

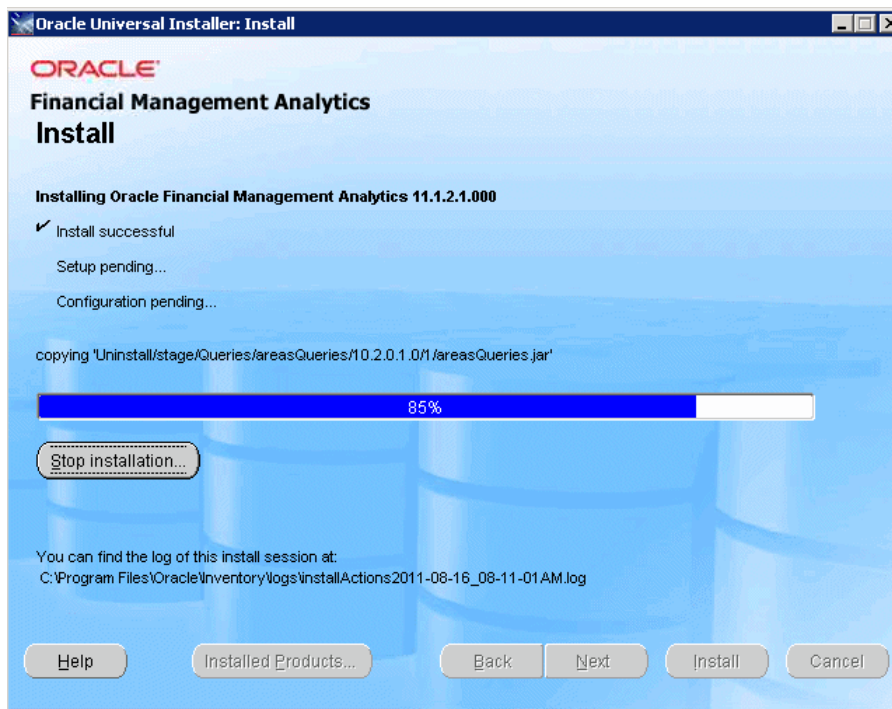


12 On the Summary screen, review the selected installation options.

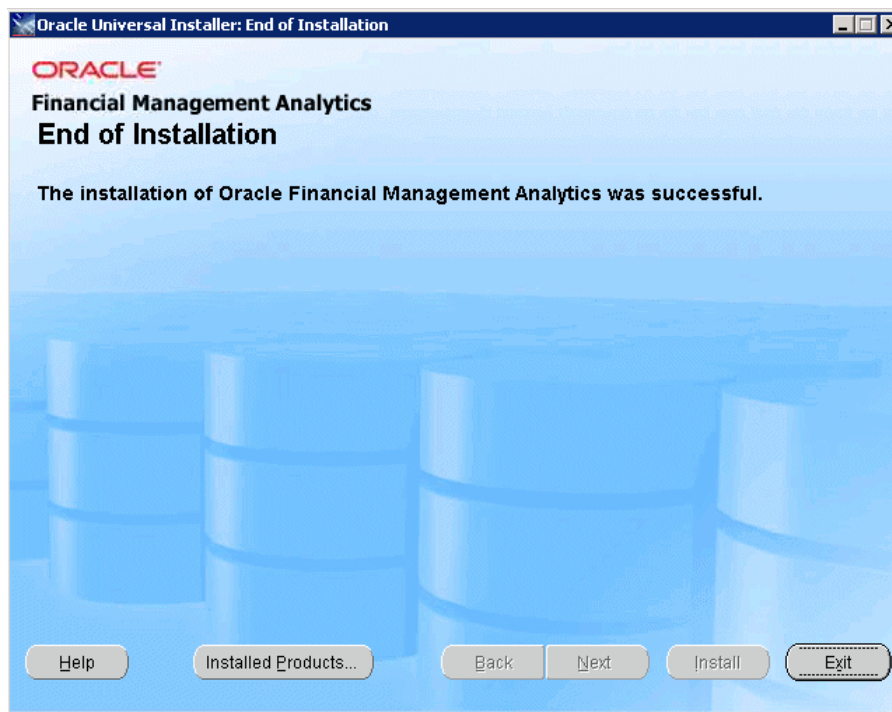
If any changes are required, click Back to return to the associated screen to make the change.

13 Click Install.

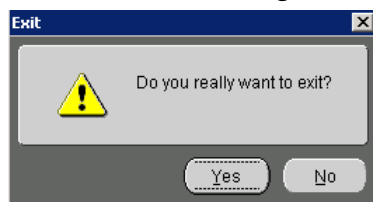
The installation is initiated. When the installation is successfully completed, the End of Installation screen is displayed.



14 On the End of Installation screen, click **Exit**.



15 Click **Yes** on the Exit dialog box to finish the installation.



- 16 **Optional:** If you want to view the application and data in another supported language, perform the steps in [“Setting the Application Language ” on page 43](#) before beginning the configuration.
- 17 Configure the application, as outlined in [Chapter 6, “Configuring Oracle Financial Management Analytics”](#).

Performing a Custom Oracle Financial Management Analytics Installation

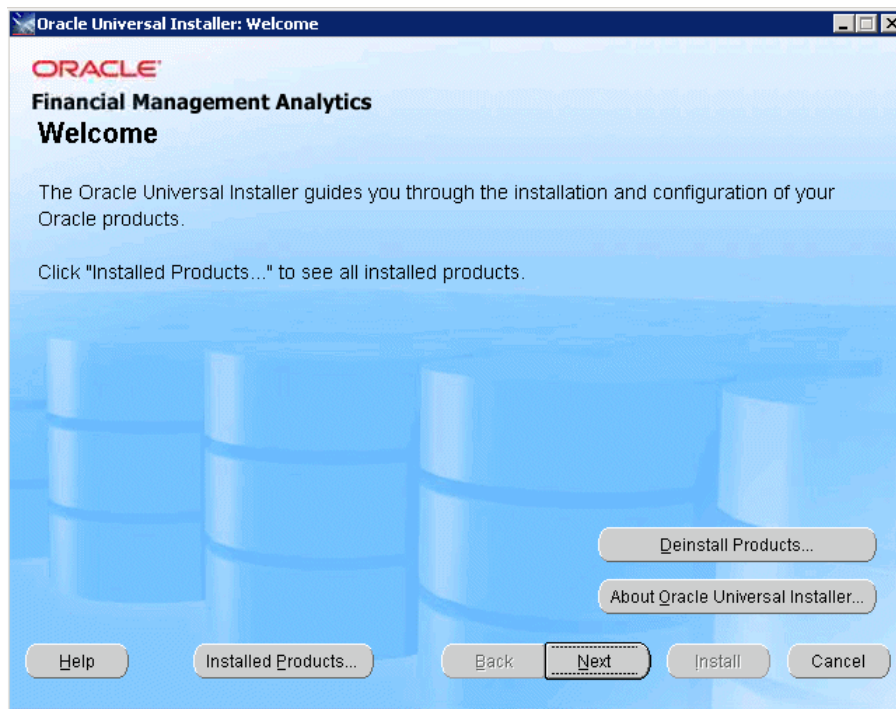
A custom installation of Oracle Financial Management Analytics enables you to select the specific components that you want to install. For example, this option may be useful if you have an existing installation and want to use the existing RPD file or catalog.

Caution! To complete the custom installation, Oracle highly recommends that you have extensive business knowledge of your Financial Management and Financial Close Management applications and Oracle BI EE. Oracle also recommends that you are the Oracle Financial Management Analytics system administrator.

- To perform a custom installation of Oracle Financial Management Analytics:
 - 1 Ensure that all system and software prerequisites are available. See [“System and Hardware Prerequisites” on page 27](#) and [“Software Prerequisites” on page 28](#).
 - 2 Ensure you have installed Oracle BI EE 11.1.1.5 and the required Patch 11.1.1.5.1 MLR.
See [“Supported Components” on page 28](#).
 - 3 **Optional:** If you plan to use the Process Management Dashboards, apply the following patches before beginning the installation:
 - For Financial Management version 11.1.1.3.500, apply required patch 12843958
 - For Financial Management version 11.1.2.1.000, apply the required patch set update release 11.1.2.1.102.
- See [“Supported Components” on page 28](#).
- 4 From the installation directory, select the installation file, **setup.exe**, for your Microsoft Windows operating system:
 - 32-bit
 - 64-bit

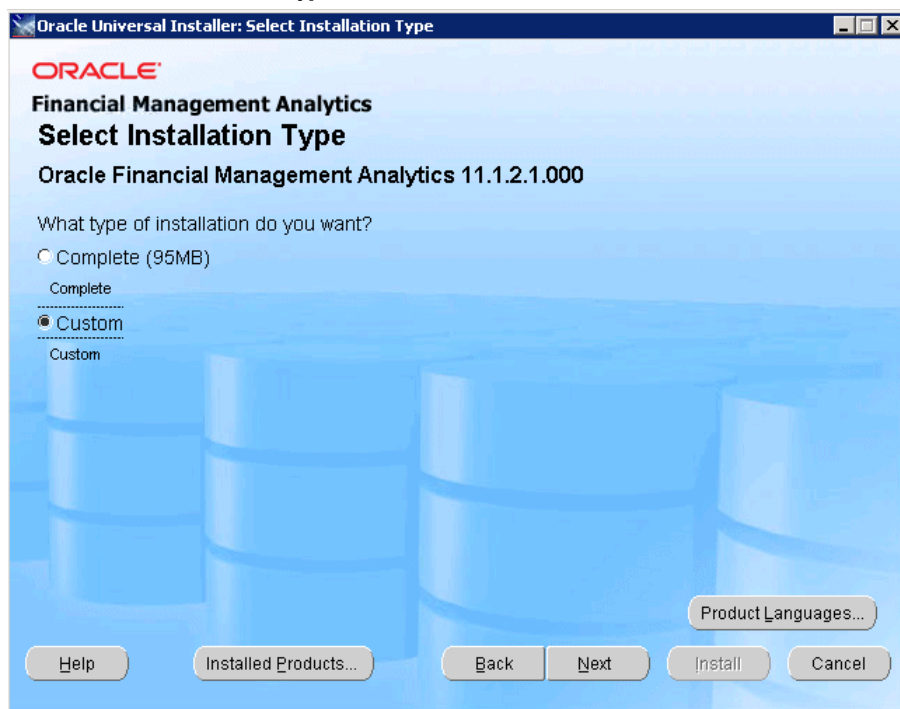
Note: For the default installation path, see [“Default Installation Path” on page 32](#).

The Welcome screen of the Oracle Universal Installer (OUI) is displayed.



5 Click **Next**.

6 On the **Select Installation Type** screen, click **Custom**, and then click **Next**.

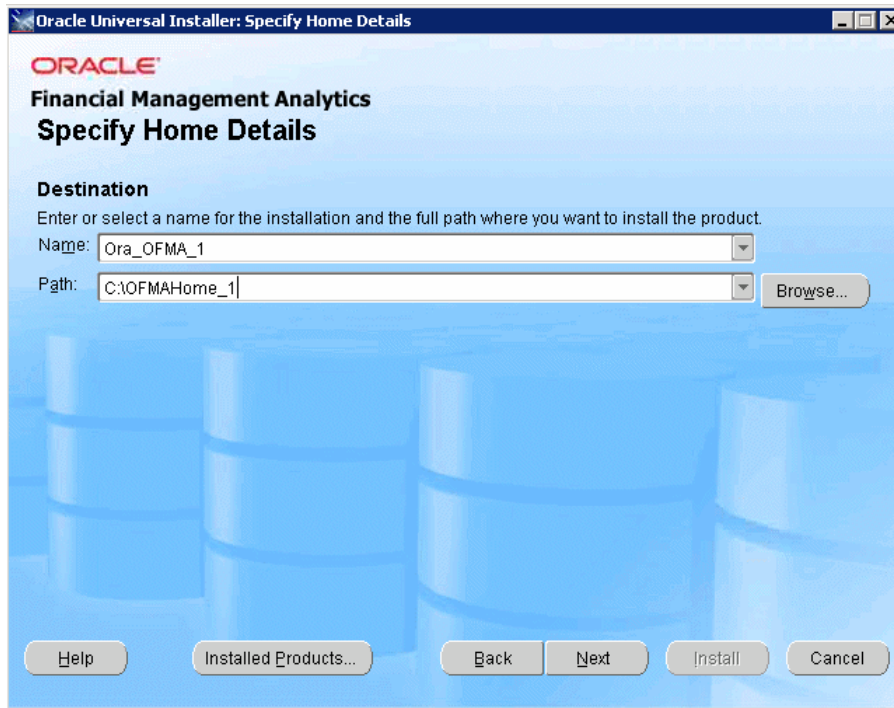


7 **Optional:** Click **Product Languages** to set the language in which you want to use the application. See [“Setting the Application Language ” on page 43](#).

8 Click **Next**.

9 On the **Specify Home Details** screen, enter the details for the new installation:

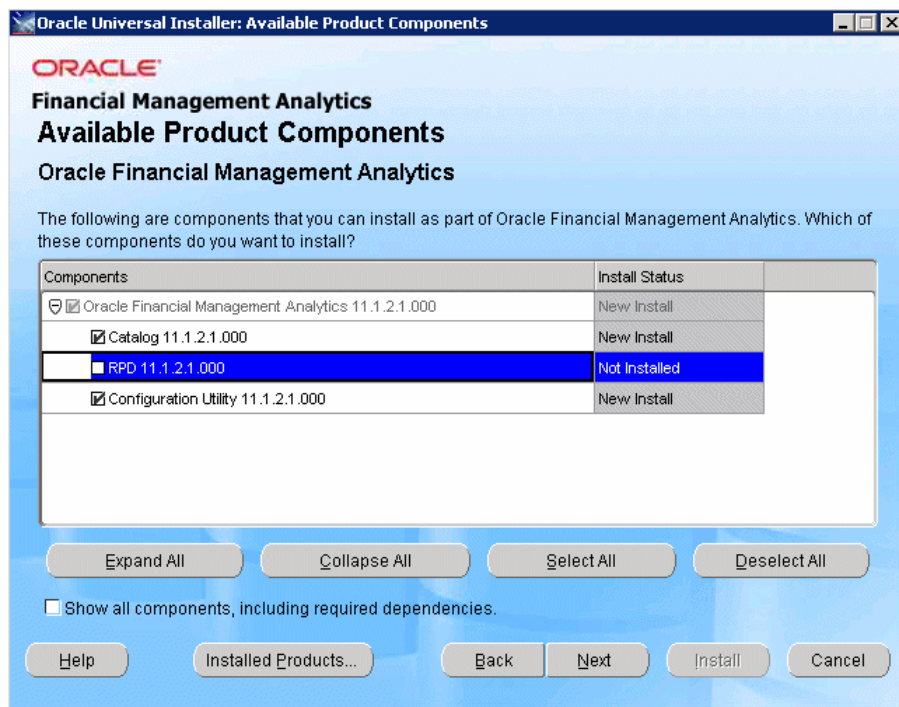
- Under **Name**, enter the name of the installation.
- Under **Path**, enter the path, or browse to the location where Oracle Financial Management Analytics is to be installed.



- 10** On the **Available Product Components** screen, select the components that you want to install, and then click **Next**.

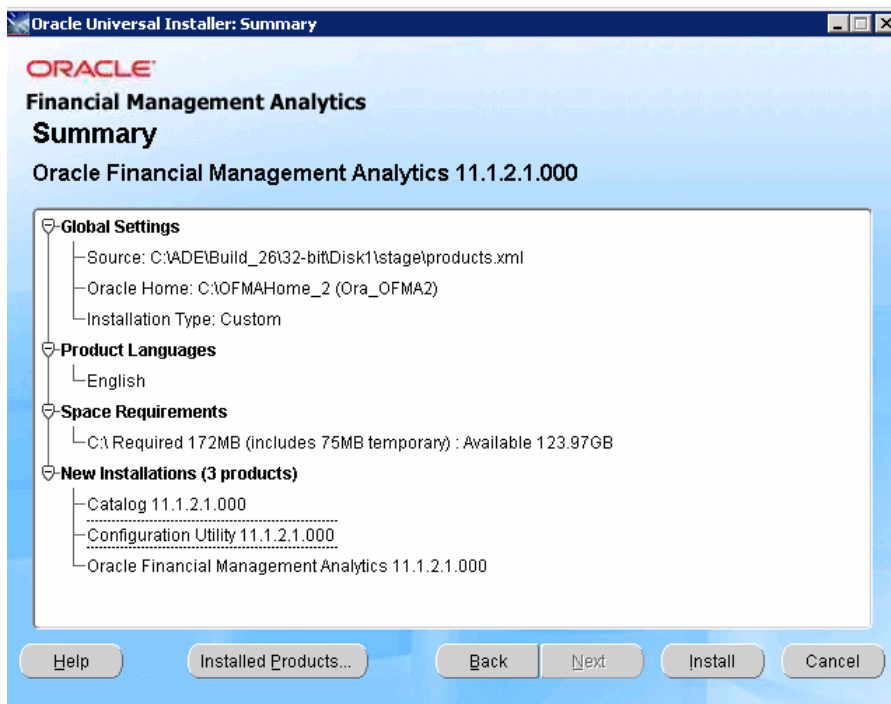
You must select one or more of the following components:

- Repository (FinancialManagementAnalytics.rpd)
- Catalog - FinancialManagementAnalytics folder
- Configuration Utility



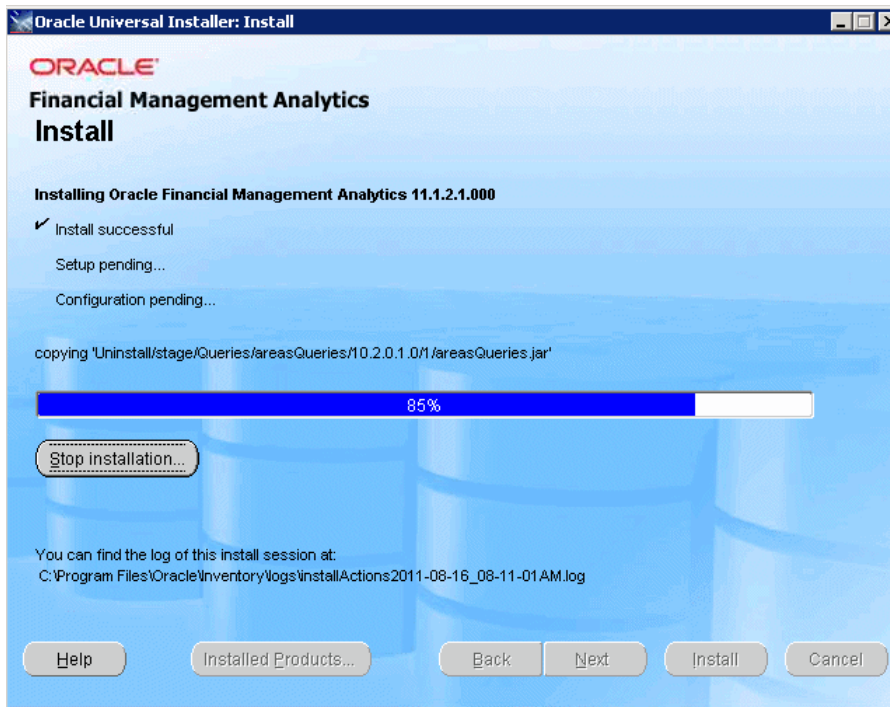
- 11** On the **Summary** screen, review the components that have been selected for installation, and then click **Install**.

To change any selections, click **Back** to return to the associated screen and make the change.

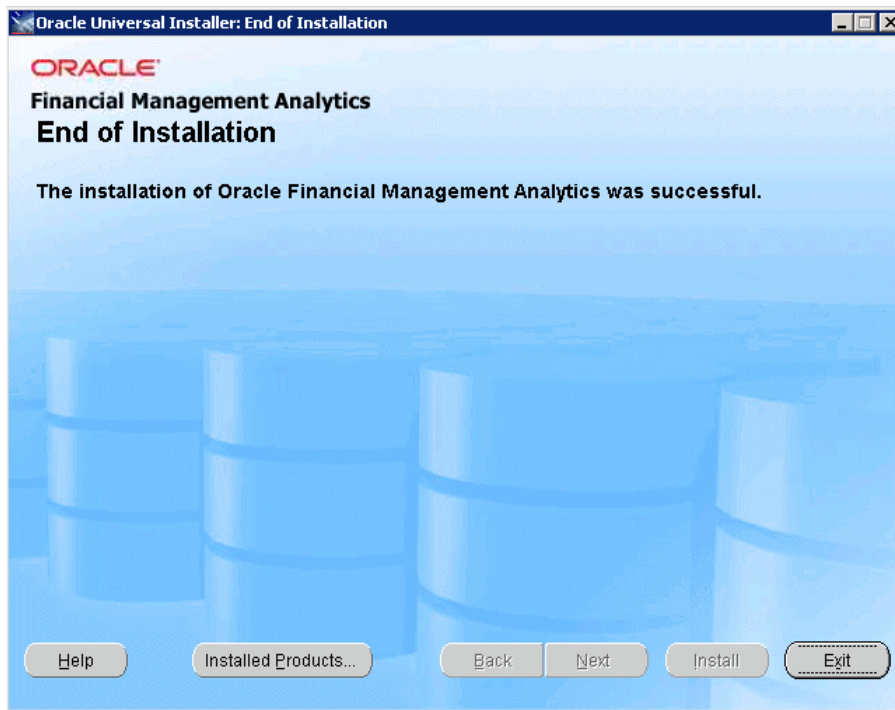


- 12** On the **Install** screen, monitor the progress of the installation.

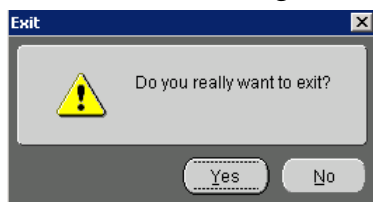
When the installation is complete, a confirmation dialog box is displayed.



- 13 When the installation is successfully completed, click **Exit**.



- 14 Click **Yes** on the Exit dialog box to finish the installation.



- 15 Configure the application, as outlined in [Chapter 6, “Configuring Oracle Financial Management Analytics”](#).

Uninstalling Oracle Financial Management Analytics

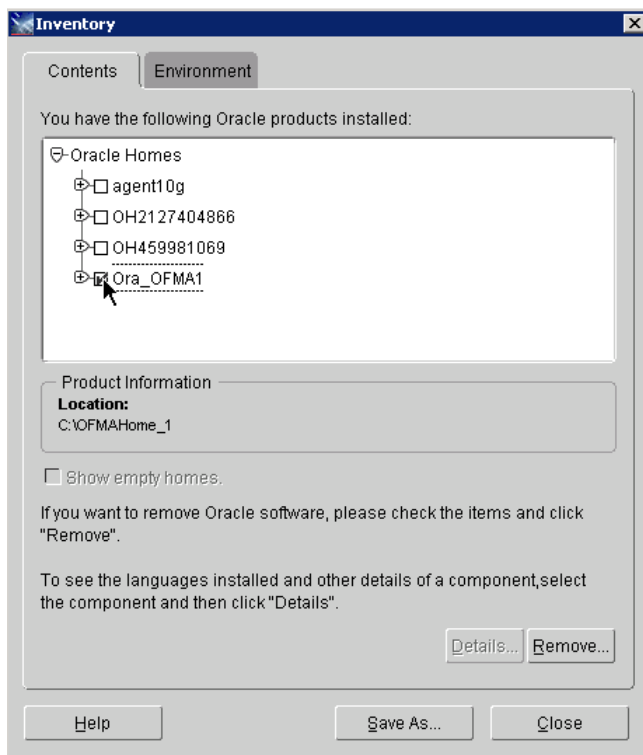
► To uninstall Oracle Financial Management Analytics:

- 1 **Back up the database, catalog and repository file for the application that is being uninstalled.**

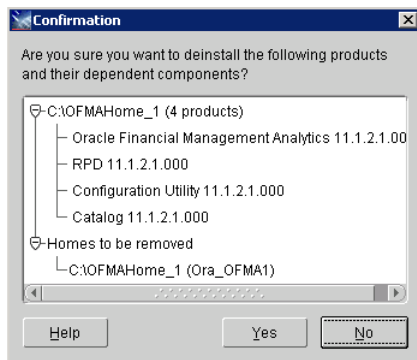
When uninstalling, all files are deleted except those that have been changed since the last installation. Any changes made to the repository and catalog, and the directory in which these files reside remain, but other binaries will be deleted.

- 2 **From the main menu, select **Start**, then **All Programs**, then **Oracle Financial Management Analytics**, , and then **Uninstaller**.**

The Inventory dialog box is displayed.



- 3 **On the **Contents** tab of the Inventory dialog box, select the Oracle Financial Management Analytics install directory (for example, Ora_OFMA1) , and then click **Remove**.**
- 4 **On the **Confirmation** screen, verify that the correct product and dependent components have been selected to be uninstalled, and then click **Yes**.**



The Oracle Financial Management Analytics is uninstalled.

- 5 **Optional:** Manually delete the default folder, `OFMAHome_x`; however, if you want the folder number to increment on reinstallation, you do not need to delete the default folder.

Setting the Application Language

Before you begin the configuration, you can set the language in which you want to view the application, and to specify your preferred currencies.

For the application language, you must create the language folders, and enable the application language selection. All localized files reside in the `<OFMA_Installed_Location>\OFMA\Localization_File` folder.

The following languages are available:

- French
- German
- Italian

For additional information about localizing languages, see “Localizing Oracle Business Intelligence” in the *Oracle® Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition*.

➤ To enable application language selection:

- 1 **Optional:** If BI Services are not stopped, select **Start**, then **All Programs**, then **Oracle Business Intelligence**, and then select **Stop BI Services**.

- 2 Navigate to `ORACLE_INSTANCE\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obipsn\msgdb\l_xx\captions` where `xx` is the language extension, and open the `msgdb` folder.

By default, this file is located in `C:\BIEE11115\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obipsn\`.

- 3 Within the `msgdb` folder, create a language folder (`l_xx`) for each language you want to use, where `xx` represents the language, as shown in the following examples:

- `l_de` (for German)

- l_fr (for French)
 - l_it (for Italian)
- 4 Within each language folder (l_xx), create a captions folder.
 - 5 Navigate to the Localization_File folder in the installation directory and copy the required language folders. By default, the files are located in <OFMA_Installed_Location>\OFMA\Localization_File.
 - 6 Paste the copied localization file into the respective language captions folder.
 - C:\BIEE11115\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\msgdb\l_fr\captions\ofmacaptions_fr.xml
 - C:\BIEE11115\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\msgdb\l_de\captions\ofmacaptions_de.xml
 - C:\BIEE11115\instances\instance1\bifoundation\OracleBIPresentationServicesComponent\coreapplication_obips1\msgdb\l_it\captions\ofmacaptions_it.xml
 - 7 Select **Start**, then **All Programs**, then **Oracle Business Intelligence** and then **Start BI Services**.
 - 8 When you restart the BI services, sign on with your **User ID** and **Password**, and then select the language in which you want to view the application and data from the drop-down list, and then click **Sign In**.
- The application is displayed using the selected language and currencies.

Sign In

Enter your user id and password.

User ID

Password

Sign In



A language selection dropdown menu. The dropdown is open, showing a list of languages. The current selection is 'English'. The list includes: English, العربية - Arabic, cesky, dansk, Deutsch, ελληνικά - ellēniká, English, Español, suomi, français, עברית - Hebrew, hrvatski, Magyar, italiano, 日本語 - nihongo, 한국어 - hangul, Nederlands, norsk, polski, Português, and Português (Brasil). The dropdown has a green border and a green arrow pointing down on the right side.

Language
English
العربية - Arabic
cesky
dansk
Deutsch
ελληνικά - ellēniká
English
Español
suomi
français
עברית - Hebrew
hrvatski
Magyar
italiano
日本語 - nihongo
한국어 - hangul
Nederlands
norsk
polski
Português
Português (Brasil)

9 Continue with the configuration as follows:

- If you are planning to use Financial Close Management dashboards, complete the procedure in [“Setting Financial Close Management Views on Oracle Databases Only”](#) on page 71.
- If you are not planning to use Financial Close Management, continue with [“Renaming Custom Dimensions”](#) on page 66.

6

Configuring Oracle Financial Management Analytics

In This Chapter

Making Selections in the Configuration Utility.....	47
Configuration Checklist.....	48
Running the Configuration Utility	49
Performing Manual Configuration Steps	62

When the installation and pre-configuration tasks have been finalized, you must, complete the configuration on the server machine.

To perform the configuration, you must run the Configuration Utility, and then complete a number of manual procedures.

Making Selections in the Configuration Utility

In Oracle Financial Management Analytics, a report or chart is only displayed to a user if that user has view rights (All, Read, Promote, Metadata) to each dimension member used in the chart or report. Care must be exercised in the choice of accounts, entities, and so on, to ensure that the proposed users for the reports have complete access to the selected dimensions or members. A list of all configuration settings is also available in the `OFMA.log` file. By default, the log file is located in `C:\OFMAHome_1\OFMA`.

Use the following options to select dimensions and members from the hierarchy:

- Select the parent in the hierarchy to display the parent member only on the report. No children of that parent are selected.
- Select an individual child under the hierarchy to display only the child separately on the report.
- Select a range of dimension members by holding the Shift key, and then selecting the first and last entry in a range. All entries within that range are displayed.
- Select random multiple dimension members by holding the Ctrl key, and then selecting individual entries. Only the selected entries are displayed.

Configuration Checklist

The configuration of Oracle Financial Management Analytics involves running the Configuration Utility wizard, and then completing a series of associated manual steps before you can launch the application.

The sequence of steps required to complete the configuration is provided on the following checklist.

Table 5 Configuration Checklist

Task	Reference
Run the Configuration Utility	<p>Complete each of the following tasks in the Configuration Utility wizard:</p> <ul style="list-style-type: none">● Launch the Configuration Utility. See “Running the Configuration Utility” on page 49.● Set the location of the catalog and repository. See step 4 on page 50.● Set connection details for the BI Admin and Financial Management servers. See step 8 and step 9 on page 51.● Select the Entities. See step 11 on page 52.● Select the Accounts. See step 12 on page 53.● Select Performance Indicators and associate accounts with each of the four performance indicators. See step 13 on page 55.● Select the Product Dimension Hierarchies. See step 14 on page 56.● Select a custom dimension or Scenario for the Currency Constant Rate dimension, and select the members that you want to include. See step 15 on page 57.● Set the default Point of View (POV) for the dashboards and reports. See step 16 on page 58.● Set connection details to enable communication between Financial Management and Oracle BI EE. See step 18 on page 59.
Set Default Members in the RPD File	<p>Use the Oracle BI EE Administration tool to set the default member values in the repository (<code>FinancialManagementAnalytics.rpd</code>).</p> <p>See “Setting Default Members in the RPD File” on page 69.</p>
Set Financial Management Application Name in the RPD File	<p>Set the Financial Management application name in the OFMA repository file (RPD).</p> <p>See “Setting the Financial Management Application Name in the RPD File ” on page 66</p>
Set the Connection Pool Parameters	<p>After uploading the repository to the BI Server, open the repository in online mode on the BI Administration Tool to define the connection parameters for with Financial Management and Financial Close Management.</p> <p>See “Setting the Connection Pool Parameters” on page 62.</p>
Set the Application Language	<p>Set the language in which you want to view the application, and specify your preferred currencies.</p> <p>See “Setting the Application Language ” on page 43.</p>
Create the FCM_OFMA Table	<p>Create the FCM_OFMA table for Financial Close Management for Oracle Databases only.</p> <p>See “Creating the FCM_OFMA Table for Financial Close Management for Oracle Databases Only” on page 70.</p>

Task	Reference
Set Financial Close Management Views on Oracle Databases Only	Create the Financial Close Management views for reports. See “Setting Financial Close Management Views on Oracle Databases Only ” on page 71.
Rename Custom Dimensions	Rename the custom dimension placeholder values to accurately reflect the custom dimensions in your Financial Management application. See “Renaming Custom Dimensions” on page 66.
Restart Oracle BI EE Manually	Update the changes in the online RPD mode by manually restarting Oracle BI EE to finalize the configuration. See “Restarting Oracle BI EE Manually” on page 74.

Running the Configuration Utility

The Configuration Utility is installed with Oracle Financial Management Analytics. After you have installed Oracle Financial Management Analytics, use the Configuration Utility to define the Financial Management metadata structures upon which your Oracle Financial Management Analytics dashboards will be built, and to select the elements and dimensions that you want to be available for display on the dashboards.

Within Oracle BI EE, you can load only one repository file (RPD) at a time. You can use the Configuration Utility at any time to modify the Oracle Financial Management Analytics configuration, or run the utility as many times as required to associate with a different RPD. If you need to merge an existing repository with an Oracle Financial Management Analytics repository, see [“Merging Repositories ” on page 23.](#)

Caution! To complete the Configuration Utility, Oracle highly recommends that you have extensive business knowledge of your Financial Management and Financial Close Management applications, and that you are an Oracle Financial Management Analytics system administrator.


➤ To run the Configuration Utility:


- 1 Ensure that you can connect to the BI Admin Server and Financial Management Client, and verify the server details.
- 2 In the Oracle BI EE Administration Tool, open the RPD, and change the default repository password **before** running the Configuration Utility. By default, the password for the shipped repository is `welcome1`.

You require the correct RPD password to upload the repository during configuration, but you cannot change the password when running the Configuration Utility.
- 3 From the main menu, select **Start**, then **All Programs**, then **Oracle Financial Management Analytics**, and then **Configuration Utility**.

Oracle Financial Management Analytics Configuration Utility

Catalog And Repository Details

Catalog Location: C:\OFMAHome_1\OFMA\FinancialManagementAnalytics 

Repository Location: C:\OFMAHome_1\OFMA\FinancialManagementAnalytics.rpd 

BI Admin Server Details

Host Name: localhost Port: 7001


User Name: weblogic Password:

HFM Server Details

Server Name: HFMServer Application Name: Comma

User Name: admin Password:

Buttons: Help, About, Back, Next, Cancel

- 4 In **Catalog Location** under **Catalog and Repository Details**, click the Browse icon  to display the **Select Catalog Location** dialog box.
- 5 Select the `FinancialManagementAnalytics` catalog folder that contains the definitions of the available dashboard graphs in which you will configure the custom Financial Management or Financial Close Management application, and then click **OK**.

By default, the catalog is located in `<OFMA Installed Location>\OFMAHome_1\OFMA`.

Select Catalog Location

Look In: OFMA

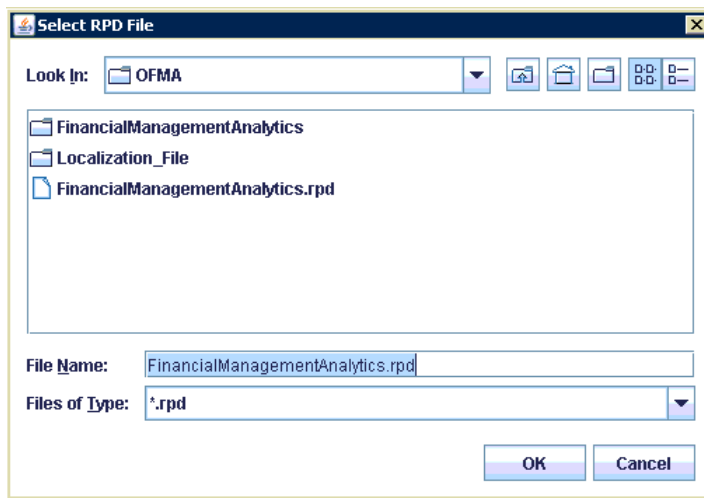
FinancialManagementAnalytics

Localization_File

Buttons: OK, Cancel

- 6 In **Repository Location** under **Catalog and Repository Details**, click the Browse icon  to display the **Select RPD File** dialog box.

By default, the repository is located in `<Installed Location>\OFMAHome_1\OFMA`.



- 7 Select the repository (RPD) file (FinancialManagementAnalytics.rpd), and then click **OK**.

Catalog And Repository Details

Catalog Location: C:\OFMAHome_1\OFMA\FinancialManagementAnalytics

Repository Location: C:\OFMAHome_1\OFMA\FinancialManagementAnalytics.rpd

BI Admin Server Details

Host Name: localhost Port: 7001

User Name: weblogic Password:

HFM Server Details

Server Name: HFMServer Application Name: Comma

User Name: admin Password:

Buttons: Help, About, Back, Next, Cancel

- 8 Under **BI Admin Server Details**, complete these fields:
- In **Host Name**, enter the Admin server name where Oracle BI EE is installed and running.
 - In **Port**, enter the port number.
 - In **User Name**, enter the Administrator user name for the Admin server.
 - In **Password**, enter the Administrator password for the Admin server.
- 9 Under **HFM Server Details**, enter the following details for the selected Financial Management source:
- Enter the name of the cluster or **Server Name** on which the Financial Management application resides.
 - Enter the **Application Name** of the Financial Management application that you will be using with Oracle Financial Management Analytics.

- Enter the **User Name** and **Password** associated with the Financial Management application. This user requires the appropriate rights and roles to access Financial Management data.

10 Click **Next**.

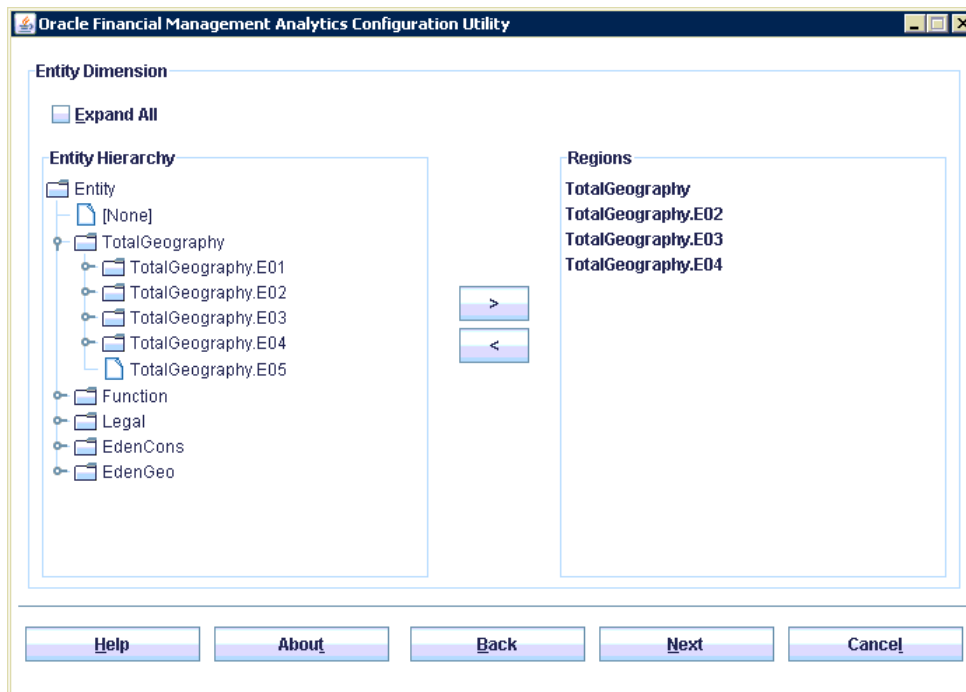
The Configuration Utility connects to the Financial Management application for which you have provided details and extracts metadata information only, based on the user's credentials. No data is extracted. This information is used to configure the dashboards in the next several steps.

Note: For returning users, if the application name is the same, the original defaults are retained. Modify defaults as required.

- If you receive an error message stating that the server is unavailable, perform the following steps:
 - a. Check the last line in the `OFMA.log` to determine the exact cause of the error.
 - b. Check the status of the Financial Management or Oracle BI EE server to verify that you are logged in and the server is up and running. If you are connecting to a cluster, ensure all servers in the cluster are up and running independently.
 - c. Check that Shared Services is up and running.
 - d. For each server, select **Start**, then **Programs**, then **Administrative Tools**, and then **Services**.
 - e. Verify the connection details to the server or cluster, including machine name, port number and login credentials.
 - f. Modify the Admin or HFM Server Details, if required.
 - g. Retry [step 9](#).

11 On the **Entity Dimension** screen, select the regional entities to be displayed on the dashboards, using the following steps:

- a. Click **Expand All** to view the entire list of entities under **Entity Hierarchy**.



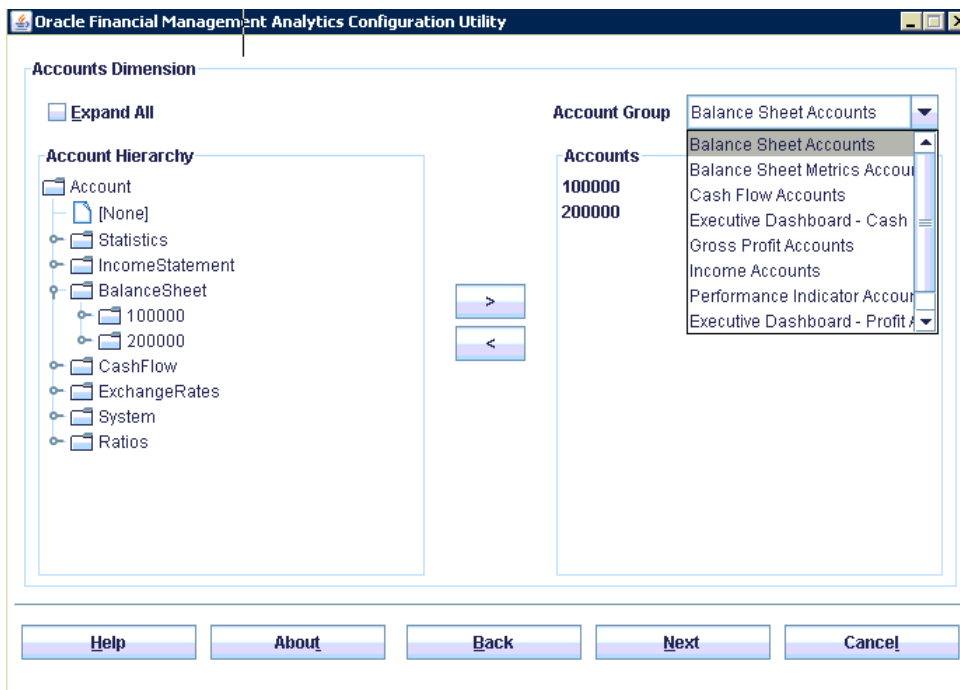
- b. Under **HFM Entity Dimension**, select the regional entities to be displayed on the dashboards, and use the arrow buttons to move them to the **Regions** column.

Dashboard	Reports or Elements
Balance Sheet	Point of View Selector regions
Cash Flow	Point of View Selector regions
Executive	<ul style="list-style-type: none"> ● Income by Regions ● Gross Profit By Product By Region ● Profit and Loss Indicators By Products ● Net Cash Flow
Gross Profit	Point of View Selector regions
Performance Indicators	Point of View Selector regions
Profit and Loss	Point of View Selector regions

- c. Click **Next**.

12 On the **Accounts Dimension** screen, select the nine account types to be displayed on the dashboards, using the following steps:

- a. Under **Account Group**, select an account group, such as Balance Sheet Accounts, Income Accounts, or Performance Indicators Accounts.



- b. Click **Expand All** to view the entire list of accounts under **Account Hierarchy**.
- c. Under **Account Hierarchy**, select the accounts that you want to display for the selected Account Group, and use the arrow buttons to move them to the **Accounts** column. The accounts that you select are displayed when you view the dashboards in Oracle Financial Management Analytics.

You must select at least one account for each Account Group, but you may select as many as you require.

Note: For the Performance Indicator account group only, you must select at least four indicators. The configuration utility will not proceed until at least four are selected. If more than four Performance Indicator selections are made, the additional choices are not displayed on the pie charts on Performance Ratio graphs, although they are available on other reports in the Performance Indicator dashboard.

The following dashboards and reports are affected by your **Accounts** selections:

Account Group	Displayed on Dashboard	Displayed in Reports
Balance Sheet Accounts	Balance Sheet Balance Sheet Currency Analysis	<ul style="list-style-type: none"> Balance Sheet Variance Analysis Balance Sheet Trend Analysis Consolidating Balance Sheet
Balance Sheet Metrics Accounts	Balance Sheet	<ul style="list-style-type: none"> Balance Sheet Metrics

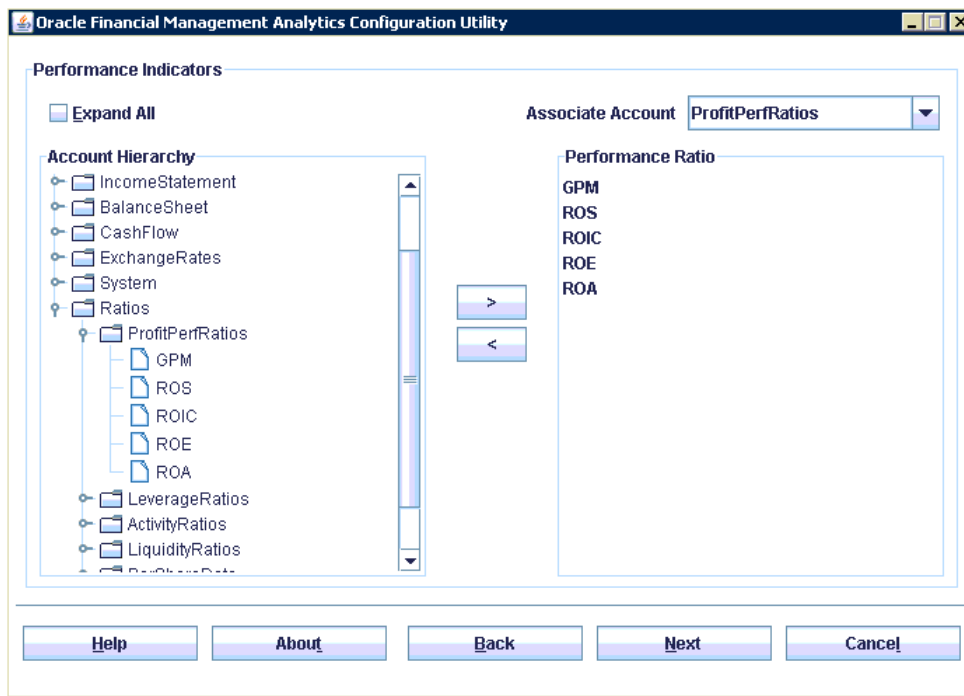
Account Group	Displayed on Dashboard	Displayed in Reports
Cash Flow Accounts	Cash Flow Cash Flow Currency Analysis	<ul style="list-style-type: none"> ● Summary Cash Flow ● Consolidating Cash Flow ● Cash Flow Variance Analysis
Executive Dashboard - Cash Flow Accounts	Executive	<ul style="list-style-type: none"> ● Net Cash Flow
Gross Profit Accounts	Gross Profit	<ul style="list-style-type: none"> ● Gross Profit By Product By Region ● Gross Profit Trend Analysis ● Gross Profit Variance Analysis
	Executive	<ul style="list-style-type: none"> ● Gross Profit By Product By Region
Income Accounts	Executive	<ul style="list-style-type: none"> ● Income by Region
Performance Indicator Accounts	Performance indicators Note: If you are assigning accounts to the Performance Indicator account group, you must choose at least four accounts to ensure the dashboard reports contain sufficient data. If more than four performance indicators are selected, the additional choices will not be displayed on the pie charts of the Performance Indicator reports.	<ul style="list-style-type: none"> ● Performance Indicators Year-over-Year ● Key Performance Indicators Rolling Twelve
Executive Dashboard - Profit and Loss Indicators Accounts	Executive	<ul style="list-style-type: none"> ● Profit and Loss Indicators By Products
Profit and Loss Accounts	Profit and Loss Currency Analysis dashboard	<ul style="list-style-type: none"> ● Trend Profit and Loss Report ● Variance Analysis ● Summary Income Statement
		<ul style="list-style-type: none"> ● Profit and Loss Currency Analysis Table ● Profit and Loss Currency Analysis Graph ● Balance Sheet Currency Analysis Table ● Cash Flow Currency Analysis Table
	Schedule Period to Period Analysis	<ul style="list-style-type: none"> ● Schedule Summary for Financial Close Management
	Workflow	

- d. Repeat step a to [step 12.c](#) for each Account group on the drop-down list to assign accounts for every account group.

13 On the Performance Indicators screen, associate accounts with each of the four performance indicators, as outlined in the following steps:

- a. Select a performance indicator account from the drop-down list.

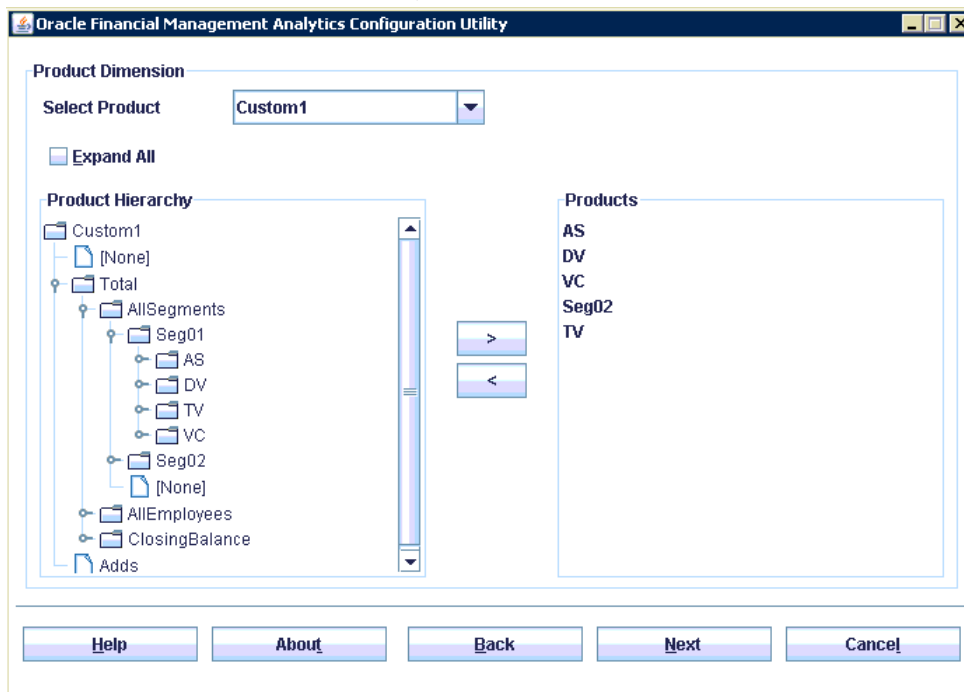
- b. Under **Account Hierarchy**, select the accounts to be associated with the performance indicator, and use the arrow buttons to move them to the **Performance Ratio** column.



- c. Repeat step a to step c for each performance indicator.

14 On the Product Dimension screen, select the products that are to be associated with each product dimension, as outlined in the following steps:

- a. From **Select Product**, select a custom dimension that has a Product hierarchy. These products are set in Financial Management.



- b. Select **Expand All** to view the entire hierarchy of the custom dimension member selected.

- c. From the **Product Hierarchy**, select the products that you require and use the arrow buttons to move them to the **Products** column. You can choose multiple products, or you may select [None]. The Product dimension and its member selection are required. The products that you choose are displayed when you view the dashboards in Oracle Financial Management Analytics.

Caution! Product data in multiple dimensions is not supported by Oracle Financial Management Analytics.

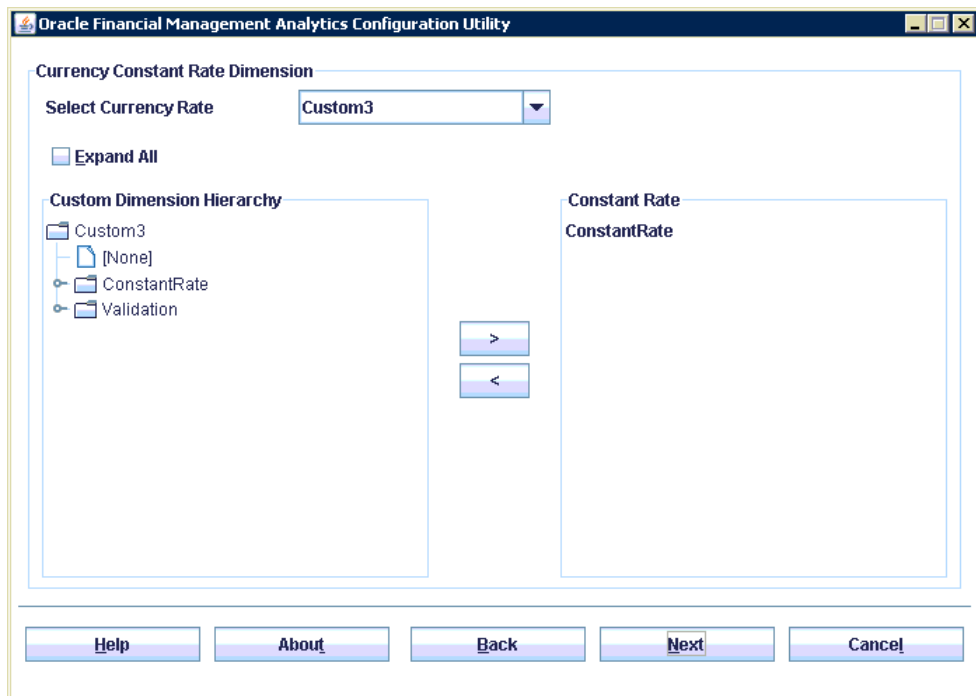
The following dashboards and reports are affected by your **Products** selections:

Dashboard	Reports
Executive	<ul style="list-style-type: none">● Gross Profit By Product By Region● Profit and Loss Indicators By Products
Gross Profit Dashboard	<ul style="list-style-type: none">● Gross Profit By Products

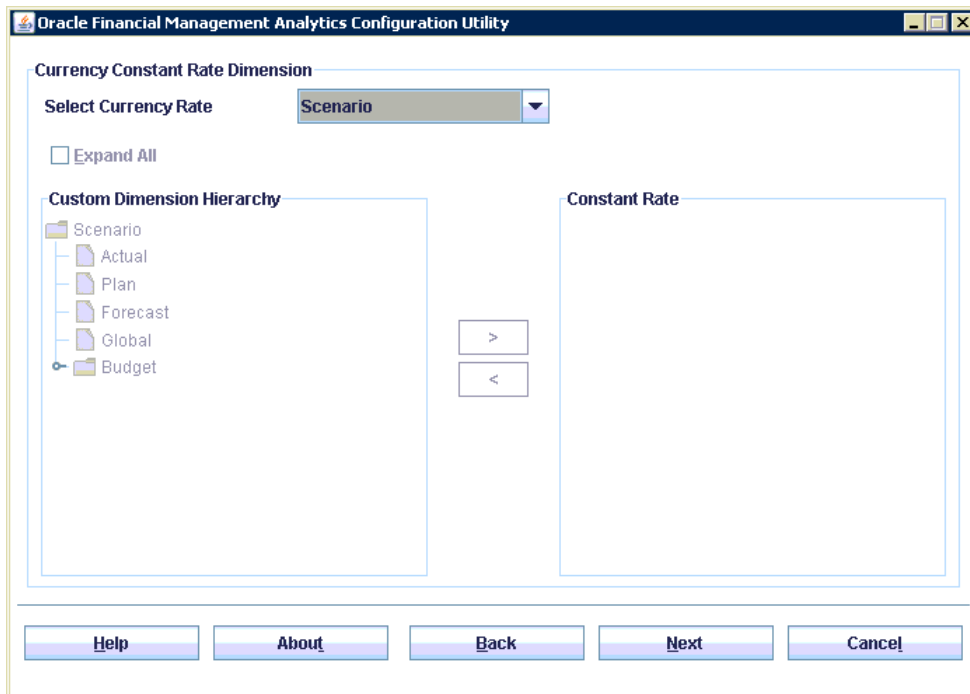
- d. Click **Next**.

15 On the **Currency Constant Rate Dimension** screen, select the custom dimension or Scenario to be used for the Currency Constant Rate dimension:

- a. From the **Select Currency Rate** drop-down list, select either a custom member or the Scenario dimension to be used as the currency constant rate dimension for the application.
- b. **Optional:** If a custom dimension was selected, complete the following steps:
- Click **Expand All** to display all members for the selected custom dimension.
 - Select the members of the custom dimension that you want to display on the report.
 - Under **Custom Dimension Hierarchy**, select the members of the custom dimension that you want to display on the report, and then use the arrow buttons to move the member to the **Constant Rate** column.



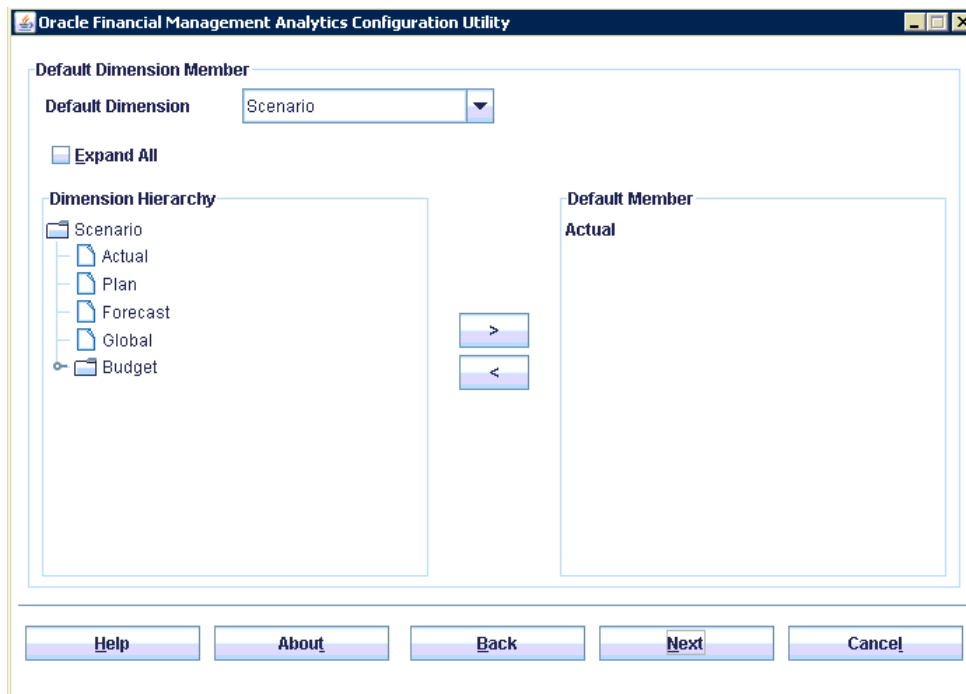
- c. **Optional:** If a **Scenario** dimension is selected, the Custom Dimension Hierarchy pane is disabled. You do not need to select any members.



- d. Click **Next**.

16 In Default Dimension Member, set the default Point of View (POV) for the dashboards, as outlined in the following steps:

- a. From the **Default Dimension** drop-down list, select a dimension.




- b. Click **Expand All** to view the entire list
- c. Under **Dimension Hierarchy**, select the default member for each POV dimension, and then use the arrow buttons to move the member to the **Default Member** column. Only one member is allowed in the Default Member column.
- d. Repeat step a to step c for each of the POV dimensions:
 - Scenario, for example, Actual, Plan, Forecast, Global, Budget
 - Year, for example, 2011
 - Period, for example, months, quarters, and so on
 - View, for example, YTD, QTD, Periodic
 - Entity, for example, a geographic region
 - Value, for example, the selected currency, such as USD.

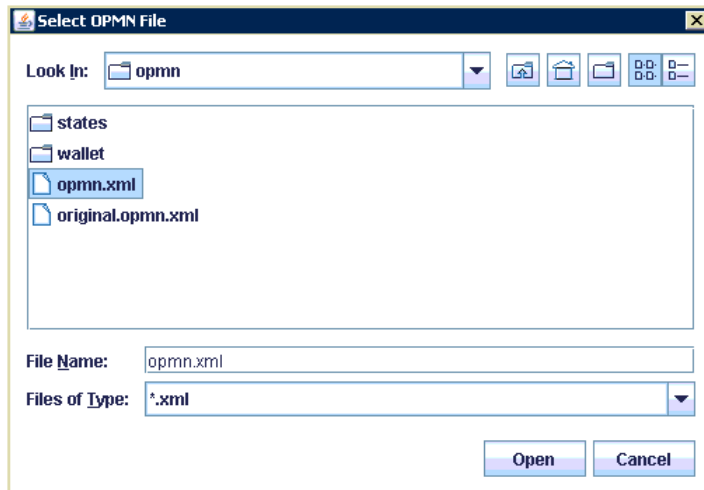
Note: You can rerun the Configuration Utility to change the default dimension members for the POV.

17 Click **Next**.

18 Complete the following information to enable connection between Financial Management and Oracle BI EE:

- Check **OPMN Changes for connecting to Hyperion Financial Management Data Source**, and enter the full path to the **opmn.xml** file, or click the Browse icon  to navigate to the location of the **opmn.xml** file.

By default, the file is located at C:\obiee\instances\instance1\config\OPMN\opmn\opmn.xml. For returning users, this step is not required if the OPMN path was already set as it is a one-time process for a machine.

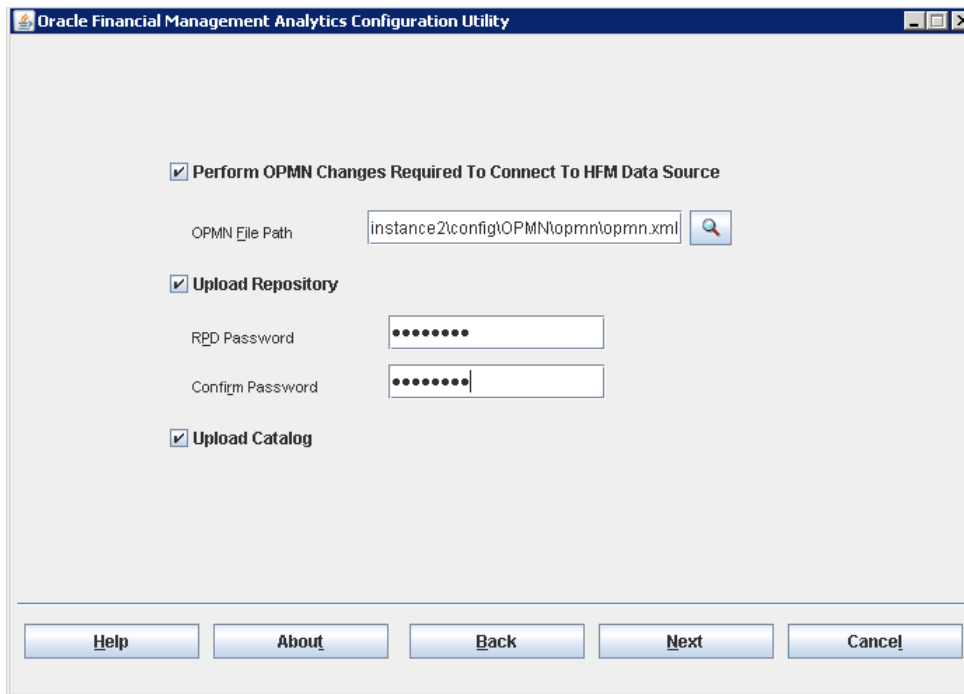


Caution! As a best practice, Oracle recommends that you create a backup copy of the opmn.xml file in case you need to restore the file.

- Check **Upload Repository**, to upload the new repository. Enter the **RPD password** and **Confirm Password** that you used to open the selected OFMA Repository (RPD).


Note: For returning users, this step is not required if no changes have been made to the RPD file since the last configuration.

- Check **Upload Catalog** to upload the Oracle Financial Management Analytics catalog to the BI Server.



Oracle Financial Management Analytics Configuration Utility

☒ Perform OPMN Changes Required To Connect To HFM Data Source

OPMN File Path: 

☒ Upload Repository

RPD Password:

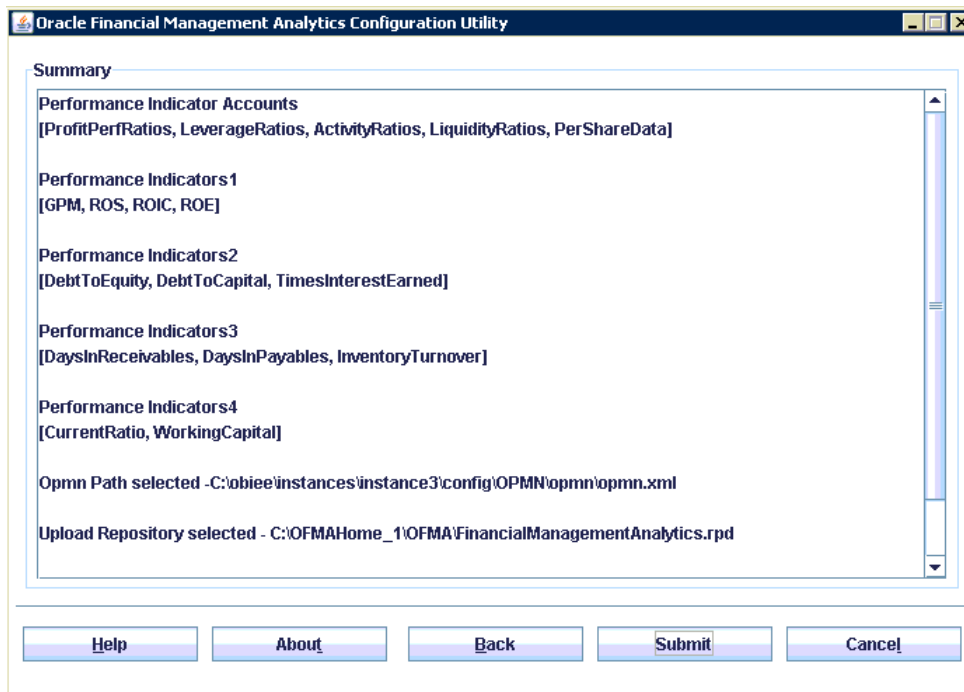
Confirm Password:

☒ Upload Catalog

Buttons: Help, About, Back, Next, Cancel

19 Click Next.

The Summary screen displays the selections that you have just made using the utility.



Oracle Financial Management Analytics Configuration Utility

Summary

Performance Indicator Accounts
[ProfitPerfRatios, LeverageRatios, ActivityRatios, LiquidityRatios, PerShareData]

Performance Indicators1
[GPM, ROS, ROIC, ROE]

Performance Indicators2
[DebtToEquity, DebtToCapital, TimesInterestEarned]

Performance Indicators3
[DaysInReceivables, DaysInPayables, InventoryTurnover]

Performance Indicators4
[CurrentRatio, WorkingCapital]

Opmn Path selected - C:\obiee\instances\instance3\config\OPMN\opmn\opmn.xml

Upload Repository selected - C:\OFMAHome_1\OFMA\FinancialManagementAnalytics.rpd

Buttons: Help, About, Back, Submit, Cancel

20 On the Summary screen, review the changes. If necessary, select Back to review and change the selections and entries that you have made on each screen of the Configuration Utility.

Note: A list of all configuration settings is also available in the OFMA.log file. By default, the log file is located in **C:\OFMAHome_1\OFMA**.

21 After reviewing your selections, click **Submit** to apply the changes.

When the configuration is submitted, the following actions are initiated:

- The account, region, product, constant rate and dimension default selection are updated to the catalog (filters and report definitions)
- If any of the following changes were selected during configuration, a lock is immediately acquired to the BI Server and the server is stopped:
 - If changes to `opmn.xml` is selected, the `opmn.xml` is edited to include the path to ADM drivers, Financial Management Client, and so on.
 - If upload repository is selected, the selected RPD file is loaded to the BI Server.
 - If upload catalog is selected, the selected catalog file is loaded to the BI Server.
- The BI Services are restarted and the Configuration Utility exits.

A confirmation dialog box advises when all changes have been successfully submitted. This operation will take a few minutes to complete.

22 Click **OK** to complete the configuration.

23 Complete the manual configuration steps. See [“Performing Manual Configuration Steps” on page 62](#).

Performing Manual Configuration Steps

A number of manual procedures are required to finalize the configuration of Oracle Financial Management Analytics:

- [“Setting the Connection Pool Parameters” on page 62](#)
- [“Setting the Financial Management Application Name in the RPD File ” on page 66](#)
- [“Renaming Custom Dimensions” on page 66](#)
- [“Setting Default Members in the RPD File” on page 69](#)
- [“Creating the FCM_OFMA Table for Financial Close Management for Oracle Databases Only” on page 70](#)
- [“Setting Financial Close Management Views on Oracle Databases Only ” on page 71](#)
- [“Restarting Oracle BI EE Manually” on page 74](#)

Setting the Connection Pool Parameters

After uploading the repository to the BI Server, you must open the repository in online mode and define the connection parameters in the `FinancialManagementAnalytics.rpd` repository file to enable the connection between Oracle Financial Management Analytics and the Financial Management and Financial Close Management servers or clusters.

See the following procedures:

- [“Setting Connection Pool Parameters for Financial Management” on page 63](#)

- “Setting Connection Pool Parameters for Financial Close Management” on page 64

Setting Connection Pool Parameters for Financial Management

You must change the Financial Management server or cluster name in the connection pool of the Physical layer in the `FinancialManagementAnalytics.rpd` file.

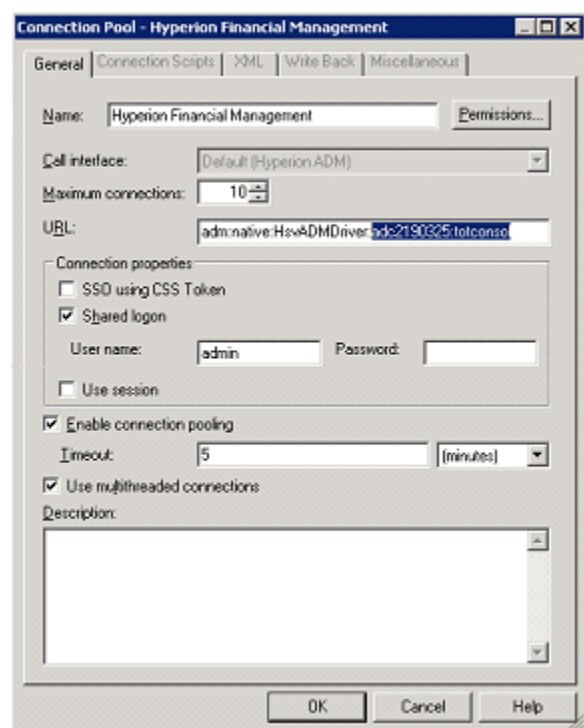
➤ To set connection pool parameters for Financial Management:

- 1 Select **Start**, then **All Programs**, then **Oracle Business Intelligence**, and then **BI Administration**.
- 2 From the Oracle BI Administration Tool, select **File**, then **Open**, and then **Online**. Enter the password for the RPD file to open it.

Note: You will be prompted for Check-out and Check-in of the RPD properties changes.

- 3 Log on to the RPD file.
- 4 Under the **Physical** layer, under **Hyperion Financial Management**, double-click **Hyperion Financial Management** to display the Hyperion Financial Management Connection Pool dialog box.

The dialog box is populated with information about the Financial Management application.



- 5 In the **URL** address, enter the name of the Financial Management Server or cluster, and the Application Name to which you want to connect in the following format, and then click **OK**:

`adm:native:HsvADMDriver:<HFM Server or Cluster>:<HFM Application Name>`

For example: `adm:native:HsvADMDriver:dinvma0050:totconsol`

- 6 Under **Connection Properties**, click **Shared Logon**, and then enter the **User name** and **Password** for the application.
- 7 Click **OK** to connect to Financial Management.
- 8 Continue with the configuration as follows:
 - If you are using Financial Close Management to display the Close Schedule Summary dashboard, complete the procedure in [“Setting Connection Pool Parameters for Financial Close Management”](#) on page 64.
 - If you are not using Financial Close Management to display the Close Schedule Summary dashboard, while BI Services are stopped, continue with [“Setting the Application Language”](#) on page 43.

Setting Connection Pool Parameters for Financial Close Management

If you are planning to use the Close Schedule Summary dashboard, you must change the Data Source name for the Financial Close Management server in the connection pool of the Physical layer in the `FinancialManagementAnalytics.rpd` file.

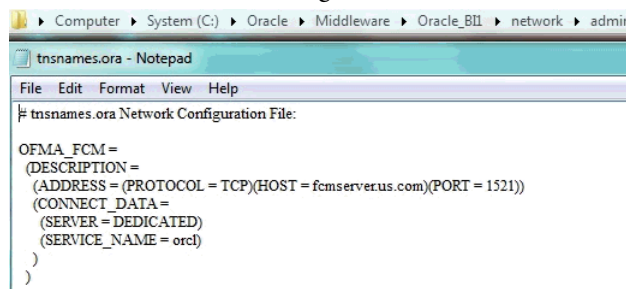
► To set connection pool parameters for Financial Close Management:

- 1 Define the database address for your Financial Close Management application in the `tnsnames.ora` file, as follows:

- Navigate to the `Oracle_Home` directory to the `tnsnames.ora` file. By default, this file is located in `C:\OBIEE\Oracle_Bi1\network\admin\tnsnames.ora`.

Note: If the `tnsnames.ora` file is not available at this location, create the file manually.

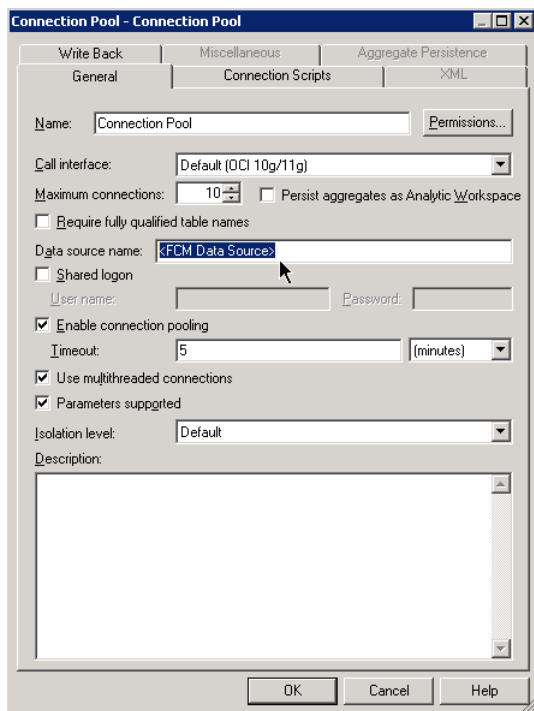
- Make a note of the entry `FCM_server`, which lists the service for Financial Close Management, such as `OFMA_FCM`. Enter this name in the **Data Source Name** in [step 5](#) on the Connection Pool dialog box of Financial Close Management in the `OFMA.rpd`.



- Change the following name values to reflect your Financial Close Management database connection:
 - **HOST** - the machine on which Financial Close Management resides
 - **PORT** - for the Financial Close Management database
 - **SERVICE_NAME** - name of the service for the Financial Close Management database
- Save the `tnsnames.ora` file.

- 2 Select **Start**, then **All Programs**, then **Oracle Business Intelligence**, and then **BI Administration**.
- 3 From the Oracle BI Administration Tool, select **File**, then **Open**, and then **Online**. Enter the user name and password for the Admin server, and the password for the Oracle Financial Management Analytics RPD file to open it, and then click **OK**.
- 4 Under the **Physical** layer, click **FCM**, and then double-click **Connection Pool** to display the Connection Pool dialog box. You will be prompted for Check-out and Check-in of the RPD properties changes.

The dialog box is populated with information about the Financial Close Management connection.



- 5 In **Data source name**, enter the listener name corresponding to your Financial Close Management database, and then click **OK**.

This database address was defined for your Financial Close Management application in the `tnsnames.ora` file. See [step 1](#).
- 6 Click **Shared Logon**, and then enter the **User name** and **Password** for the Financial Close Management database.
- 7 Select **OK**.
- 8 Select **Start**, then **All Programs**, then **Oracle Business Intelligence**, and then select **Stop BI Services**.
- 9 While BI Services are stopped, continue with [“Setting the Application Language ” on page 43](#).
- 10 After setting the application language, select **Start**, then **All Programs**, then **Oracle Business Intelligence** and then **Start BI Services**.

Setting the Financial Management Application Name in the RPD File

You must set the Financial Management application name in the online repository file `FinancialManagementAnalytics.rpd`.

► To set the Financial Management application name in the RPD file:

- 1 From the Oracle BI EE Administration tool, click **Open Online**.
- 2 Enter the **Repository Password** for the Oracle Financial Management Analytics repository.
- 3 Enter the administrator **User** and **Password**.
- 4 **Optional:** Select **Load all objects on startup**.
- 5 Click **Open**.
- 6 In the RPD file, under the **Physical** layer, select **HFM**, and then double-click **HFM Application** to display the Cube Table - HFM Application dialog box.
- 7 In the **External Name** text box, enter the name of the associated Financial Management application.

If the application is localized, use the string “OFMA” as the localized application name. The correct application name is referenced.

Note: When you click OK to connect to Financial Management, you are prompted to confirm your password. Enter your password, and then click **OK**

- 8 Click **OK**.
- 9 Continue with the configuration by setting the connection pool parameters. See [“Setting the Connection Pool Parameters” on page 62](#).

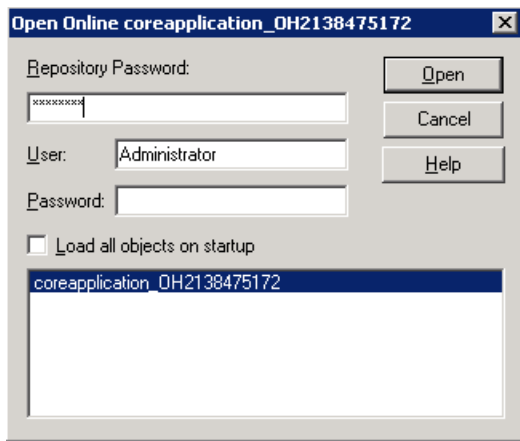
Renaming Custom Dimensions

After installation, the Custom Dimension names in the Oracle Financial Management Analytics repository files are displayed as placeholders, such as Custom1, Custom2, Custom3, and Custom4.

You must rename these placeholder values to accurately reflect the custom dimensions in your Financial Management application. For example, the placeholder custom dimensions might be renamed to alias names such as “Products,” “Customers,” “Sales Channels,” and so on.

► To rename custom dimensions:

- 1 From the main menu, select **Start**, then **All Programs**, then **Oracle Business Intelligence**, and then **BI Administration**.
- 2 From the Oracle BI Administration Tool, select **File**, then **Open**, and then **Online**.



3 On the **Open Online** dialog box, complete the following fields, and then click **Open**:

- Enter the **Repository Password**.
- Enter the **User Name** and **Password**.
- Optional: Select **Load all objects on startup**.
- Select the required application

The selected repository file is displayed.

4 On the Oracle BI Administration Tool, under the **Physical** column, select **HFM**, then **HFM Application**, and then double-click **Custom1**.

The Physical Dimension dialog box is displayed.

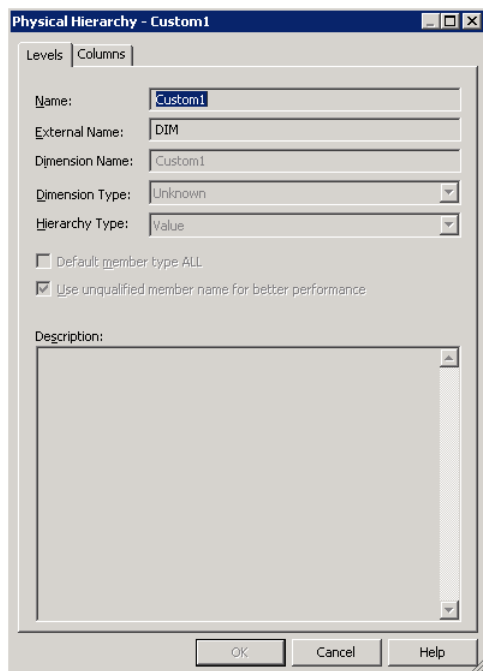
5 In **Name**, enter the name of the associated custom dimension in the selected Financial Management application.

6 In **Default Member**, enter a valid member value corresponding to your application, and then click **OK**.

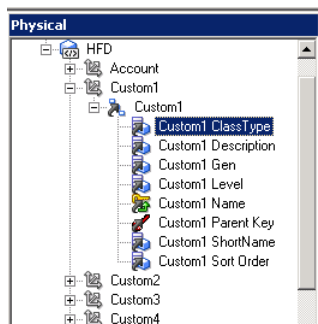
7 Expand the **Custom1** dimension to display all members in the hierarchy.

8 Under **Physical**, double-click the first level **Custom1** dimension.

The Physical Hierarchy dialog box is displayed.

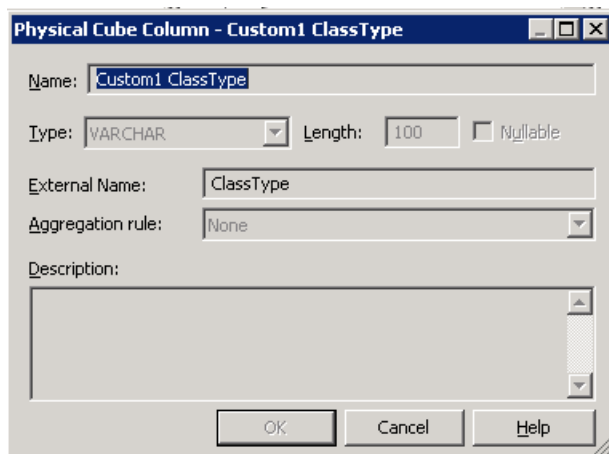


- 9 On the **Levels** tab, under **Name**, enter the associated custom dimension name from the Financial Management application, and then click **OK**.
- 10 In the expanded **Custom1** dimension list, select the first column in the database hierarchy.



- 11 Double-click the column name.

The Physical Cube Column dialog box is displayed.



- 12 In the **Name** field, modify the database column name to reflect the name of the column in the associated Financial Management application.

For example, change Custom1 ClassType to Channel ClassType.

- 13 Repeat [step 10](#) to [step 12](#) for each column in the custom dimension.
- 14 When all dimensions under the custom dimension hierarchy are renamed, repeat [step 4](#) to [step 13](#) for each additional custom dimension, for example, Custom2, Custom3, and Custom4.
- 15 When all custom dimensions are renamed, select **File**, and then **Save** to save the selection.
- 16 Restart Oracle BI EE to update all changes. See [“Restarting Oracle BI EE Manually” on page 74](#).

Setting Default Members in the RPD File

Use the Oracle BI EE Administration Tool to set the default member values in the online repository file (FinancialManagementAnalytics.rpd).

The default dimension values for dimensions in the repository file are displayed on the following table.

Table 6 Default Dimension Values for RPD File

Dimension Name	Default Value
Account	[None]
Custom1	[None]
Custom2	[None]
Custom3	[None]
Custom4	[None]
Entity	[None]
ICP (Intercompany)	[ICP None]
Period	<Period>
Scenario	<Scenario>
Value	<Entity Currency>
View	<Scenario View>
Year	<Year>

After completing and submitting the configuration utility, you can view the selected defaults in the OFMA.log file, under the section “HFM Dimension Default Selection Page.”

► To set default members in the RPD file:

- 1 From the Oracle BI EE Administration tool, click **Open Online**.

- 2 Enter the **Repository Password** for the Oracle Financial Management Analytics repository.
- 3 Enter the administrator **User** and **Password**.
- 4 **Optional:** Select **Load all objects on startup**.
- 5 Click **Open**.
- 6 In the RPD file, under the **Physical** layer, select **HFM**, then **HFM Application** to display all dimensions.
- 7 For each dimension in the hierarchy, complete the following steps:
 - a. Double-click the **Dimension** to display the Physical Dimension dialog box.
 - b. On the **Hierarchies** tab, in the **Default Member** text box, enter the valid corresponding member value from the Financial Management application.

To view the selections you made during the configuration, view the selected defaults in the OFMA.log file, under the section “HFM Dimension Default Selection Page.”

Caution! If the default values for the dimensions are not entered, errors will be generated in the Oracle Financial Management Analytics reports.

- 8 Select **Save**.
- 9 Restart Oracle BI EE to update all changes. See [“Restarting Oracle BI EE Manually” on page 74](#).

The connection pool, custom dimension names, and other configuration details are updated. The configuration is complete.

Creating the FCM_OFMA Table for Financial Close Management for Oracle Databases Only

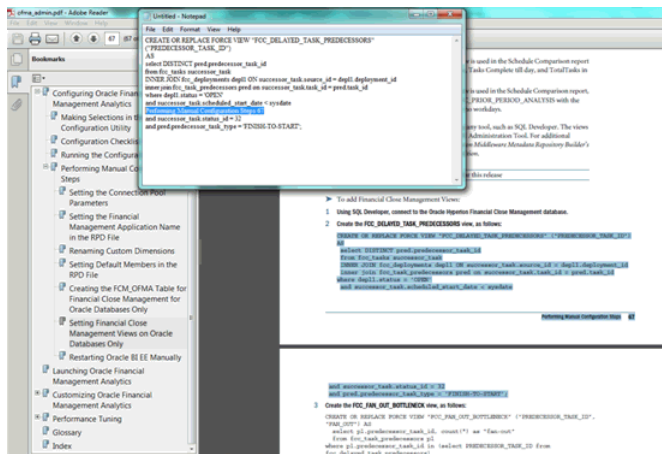
If you are planning to use the Financial Close Management dashboards, you must create the FCM_OFMA table.

The FCM_OFMA table is used in the database to create a sequence of work days for combining results in the FCC_PRIOR_PERIOD_ANALYSIS, to a maximum of 1001 days. This table is only visible in the database, not the RPD file.

Caution! Only Oracle databases are supported for this release.

For additional information about creating tables, see the *Oracle® Fusion Middleware Connectivity and Knowledge Modules Guide for Oracle Data Integrator*.

Caution! If you copy the script from the document PDF, the script may run on to the next page. Ensure that you capture all lines for the selected script, and that you DO NOT capture the document footer or page number when copying, as shown in the screen capture below; otherwise, the script will fail:



► To create the FCM_OFMA table:

- 1 Using SQL Developer, connect to the Financial Close Management database.
- 2 Create the table, as follows:

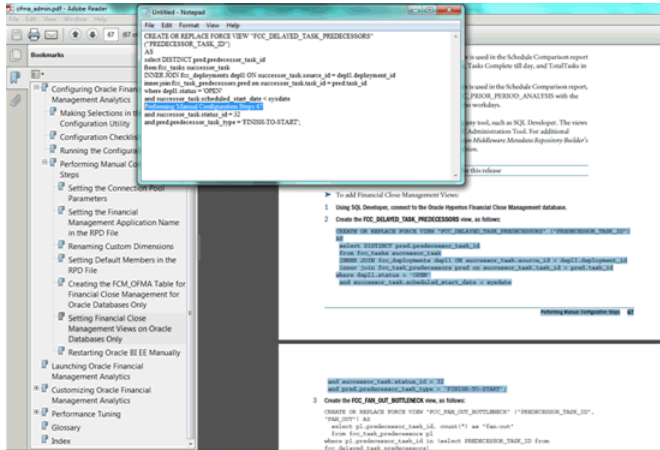
```
Create table FCM_OFMA (WORKDAYS number(4));
DECLARE
v_Counter BINARY_INTEGER := -500;
BEGIN
    WHILE v_Counter <= 500 LOOP
        INSERT INTO FCM_OFMA (WORKDAYS) VALUES (v_Counter);
        v_Counter := v_Counter + 1;
    END LOOP;
END;
```

Setting Financial Close Management Views on Oracle Databases Only

If you are planning to use the Financial Close Management dashboards, you must create the following views:

- FCC_DELAYED_TASK_PREDECESSORS – This view is used in the Schedule Roadblocks report to obtain a list of predecessor tasks for tasks that have one or more succeeding tasks that are late.
- FCC_FAN_OUT_BOTTLENECK – This view is used in the Schedule Roadblocks report to obtain counts of all successor tasks (fan-out count), even if they are not late.
- FCC_DELAY_BOTTLENECK – This view is used in the Schedule Roadblocks report to identify the sum of all played tasks.
- FCC_PRIOR_PERIOD_ANALYSIS – This view is used in the Schedule Comparison report to obtain the Schedule ID, Schedule workdays, Tasks Complete till day, and TotalTasks in Schedule.
- FCC_SCHEDULE_COMPARISON – This view is used in the Schedule Comparison report, and provides a union of the data from the FCC_PRIOR_PERIOD_ANALYSIS with the FCM_OFMA table, in the event that there are no workdays.

Caution! If you copy the script from the document PDF, the script may run on to the next page. Ensure that you capture all lines for the selected script, and that you DO NOT capture the document footer or page number when copying, as shown in the screen capture below; otherwise, the script will fail:



The views are created in an Oracle database, using any tool, such as SQL Developer. The views are displayed in the Physical Layer in the Oracle BI Administration Tool. For additional information on creating views, see the *Oracle® Fusion Middleware Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition*.

Caution! Only Oracle databases are supported for this release

► To add Financial Close Management Views:

1 Using SQL Developer, connect to the Oracle Hyperion Financial Close Management database.

2 Create the `FCC_DELAYED_TASK_PREDECESSORS` view, as follows:

```
CREATE OR REPLACE FORCE VIEW "FCC_DELAYED_TASK_PREDECESSORS" ("PREDECESSOR_TASK_ID")
AS
select DISTINCT pred.predecessor_task_id
from fcc_tasks successor_task
INNER JOIN fcc_deployments depl1 ON successor_task.source_id = depl1.deployment_id
inner join fcc_task_predecessors pred on successor_task.task_id = pred.task_id
where depl1.status = 'OPEN'
and successor_task.scheduled_start_date < sysdate
and successor_task.status_id = 32
and pred.predecessor_task_type = 'FINISH-TO-START';
```

3 Create the `FCC_FAN_OUT_BOTTLENECK` view, as follows:

```
CREATE OR REPLACE FORCE VIEW "FCC_FAN_OUT_BOTTLENECK" ("PREDECESSOR_TASK_ID",
"FAN_OUT") AS
select p1.predecessor_task_id, count(*) as "fan-out"
from fcc_task_predecessors p1
where p1.predecessor_task_id in (select PREDECESSOR_TASK_ID from
fcc_delayed_task_predecessors)
and p1.predecessor_task_type = 'FINISH-TO-START'
GROUP by p1.predecessor_task_id;
```


4 Create the **FCC_DELAY_BOTTLENECK** view, as follows:

```
CREATE OR REPLACE FORCE VIEW "FCC_DELAY_BOTTLENECK" ("PREDECESSOR_TASK_ID",
"TOTAL_DELAY_IN_DAYS") AS
  select p1.predecessor_task_id, sum(sysdate - successor_task.scheduled_start_date)
as total_delay_in_days
  from fcc_task_predecessors p1
 inner join fcc_tasks successor_task on p1.task_id = successor_task.task_id
 where p1.predecessor_task_id in (select PREDECESSOR_TASK_ID from
 fcc_delayed_task_predecessors)
  and sysdate - successor_task.scheduled_start_date > 0
  and p1.predecessor_task_type = 'FINISH-TO-START'
 GROUP by p1.predecessor_task_id;
```

5 Create the **FCC_PRIOR_PERIOD_ANALYSIS** view, as follows:

```
CREATE OR REPLACE FORCE VIEW "FCC_PRIOR_PERIOD_ANALYSIS" ("DEPLOYMENT_ID",
"COMPLETED_TASKS", "TOTAL_TASKS", "DAYS_FRM_ZERO_DATE")
AS
SELECT dc.deployment_id as DEPLOYMENT_ID,
SUM(tc.taskCompleted) as COMPLETED_TASKS ,
dc.total as TOTAL_TASKS ,
(TRUNC(ft.ACTUAL_END_DATE) - TRUNC(dc.day_zero_date)) AS DAYS_FRM_ZERO_DATE
FROM
  (SELECT DISTINCT TRUNC(ACTUAL_END_DATE) AS actual_end_date,          source_id
  FROM fcc_tasks
  ) ft,
  (SELECT deployment_id,
    (SELECT COUNT(1) FROM fcc_tasks fct WHERE fcd.deployment_id= fct.source_id
    ) total,
    day_zero_date
  FROM fcc_deployments fcd
  GROUP BY deployment_id ,
    day_zero_date
  ) dc ,
  (SELECT COUNT(1) taskCompleted ,
    fccd.deployment_id,
    (TRUNC(fcct.ACTUAL_END_DATE) - TRUNC(fccd.day_zero_date)) taskday
  FROM fcc_tasks fcct,
    fcc_deployments fccd
  WHERE fccd.deployment_id= fcct.source_id
  GROUP BY fccd.deployment_id,
    (TRUNC(fcct.ACTUAL_END_DATE) - TRUNC(fccd.day_zero_date))
  ) tc
WHERE dc.deployment_id= ft.source_id
AND tc.deployment_id = ft.source_id
AND ( tc.taskday <= (TRUNC(ft.ACTUAL_END_DATE) -TRUNC(dc.day_zero_date)))
GROUP BY dc.deployment_id,
  dc.total,
  (TRUNC(ft.ACTUAL_END_DATE) - TRUNC(dc.day_zero_date))
ORDER BY deployment_id ,
  (TRUNC(ft.ACTUAL_END_DATE) -TRUNC(dc.day_zero_date));
```

6 Create the **FCC_SCHEDULE_COMPARISON** view, as follows:

```
CREATE OR REPLACE FORCE VIEW "FCC_SCHEDULE_COMPARISON" ("WORK_DAYS",
"COMPLETED_TASKS", "TOTAL_TASKS", "DEPLOYMENT_ID")
AS
  SELECT WORKDAYS WORK_DAYS,
    NVL(
```

```

(SELECT NVL(completed_tasks, 0)
FROM fcc_prior_period_analysis
WHERE fcc_prior_period_analysis.deployment_id = FCD.deployment_id
AND fcc_prior_period_analysis.days_frm_zero_date = WORKDAYS
) , (
(SELECT COUNT(1) taskCompleted
FROM fcc_tasks fcct,
     fcc_deployments fccd
WHERE fccd.deployment_id = FCD.deployment_id
AND fccd.deployment_id = fcct.source_id
AND (TRUNC(FCCT.ACTUAL_END_DATE) - TRUNC(fccd.day_zero_date)) <= WORKDAYS
) ) COMPLETE_TASKS,
NVL(
(SELECT NVL(TOTAL_tasks, 0)
FROM fcc_prior_period_analysis
WHERE fcc_prior_period_analysis.deployment_id = FCD.deployment_id
AND fcc_prior_period_analysis.days_frm_zero_date = WORKDAYS
) ,
(SELECT NVL(TOTAL_tasks, 0)
FROM fcc_prior_period_analysis
WHERE fcc_prior_period_analysis.deployment_id = FCD.deployment_id
AND ROWNUM <2
) ) TOTAL_TASKS ,
( NVL(
(SELECT NVL(deployment_id, fcd.deployment_id)
FROM fcc_prior_period_analysis
WHERE fcc_prior_period_analysis.deployment_id = FCD.deployment_id
AND fcc_prior_period_analysis.days_frm_zero_date = WORKDAYS
) , fcd.deployment_id) ) DEPLOYMENT_ID
FROM FCM_OFMA,
     FCC_DEPLOYMENTS FCD;

```

7 Continue the configuration with [“Renaming Custom Dimensions” on page 66](#).

Restarting Oracle BI EE Manually

After making configuration changes, you must update the changes in the online RPD mode by manually restarting Oracle BI EE, either from the main menu or the command window.

► To manually restart Oracle BI EE from the main menu:

- 1 Select **Start**, then **All Programs**, then **Oracle Business Intelligence**, and then select **Stop BI Services**.
- 2 Enter your Admin User and password at the command prompt.
- 3 After all services are stopped, select **Start**, then **All Programs**, then **Oracle Business Intelligence** and then **Start BI Services**.

The connection pool, custom dimension names, and other configuration details are updated. The configuration is complete.

► To manually restart Oracle BI EE from the command window:

- 1 Select **Start**, then **Run** to open the Run window.

2 Enter `cmd` to open the command window.

3 Enter the following commands:

```
C:\<OBIEE_Install_path>\instances\instance1\bin\  
opmnctl.bat stopall
```

4 After all services are stopped, enter the following commands:

```
C:\<OBIEE_Install_path>\instances\instance1\bin\  
opmnctl.bat startall
```

The connection pool, custom dimension names, and other configuration details are updated. The configuration is complete.

7

Launching Oracle Financial Management Analytics

After installation and configuration, you access Oracle Financial Management Analytics through Oracle BI EE.

► To access Oracle Financial Management Analytics:

1 Ensure that the following applications are configured and running:

- Oracle Financial Management Analytics
- Financial Management Client
- Financial Management ADM Driver
- Oracle BI EE
- Oracle Hyperion Shared Services

For additional information, see [“Authorization for Oracle Financial Management Analytics Administrator” on page 27](#).

2 In a browser, enter the URL for Oracle BI EE.

The URL is in the format: `http://server name:port number/analytics`, where:

- **ServerName** is the name of the computer hosting the Oracle BI EE server.
- **Port** is the Oracle BI EE server port number
- **analytics** is the Virtual Directory set for Oracle Financial Management Analytics on the Oracle BI EE server

The Oracle Business Intelligence screen is displayed.

3 On the Oracle BI EE Sign-In screen, enter the user name and password for the Financial Management administrator. This user must have the required permission in both Oracle Hyperion Financial Management and Oracle BI EE.

Note: The user name and password are case-sensitive.



The image shows a 'Sign In' form with the following elements:

- Sign In** (link)
- Enter your user id and password.
- User ID (text input field)
- Password (password input field)
- Sign In (button)
- Language selection (dropdown menu showing 'English')

- 4 **Optional:** Select the language in which you want to view the dashboards.

The default language is English.

- 5 **Click Sign In.**

The Oracle Financial Management Analytics Home page is displayed.

See the *Oracle Financial Management Analytics User's Guide* for information about the dashboards.



Customizing Oracle Financial Management Analytics

In This Chapter

Scaling Financial Values	79
Sorting Columns	80
Setting Number of Days on Process Management Report	81
Formatting Conditions on the Close Schedule Summary	83
Changing Report Names	84
Adding Company Logo	85
Hiding Dashboard Reports	85


In some instances, the content of the preformatted dashboards may not provide enough detail or the correct information or formatting for specific customers. You can customize the reports to display the information you need through the Edit option on each report.

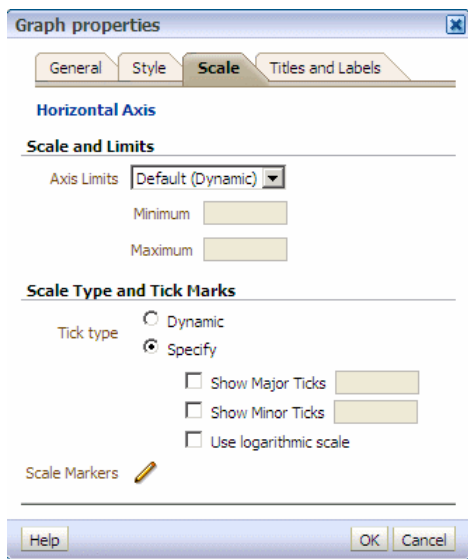
Caution! The customizing options are available only to authorized administrative users. To customize the reports, Oracle highly recommends that the authorized administrator be experienced using Oracle BI EE and Oracle Business Intelligence Answers.

Scaling Financial Values

The scale for each report can be modified to reflect specific values. If you want to modify the values, they must be set on each individual report.

► To set scale values:

- 1 On the Oracle BI EE Home screen, select **Dashboards**, then **OFMA**, and then **Oracle Financial Management Analytics**.
- 2 Select the report that you want to modify, and then click **Edit**.
The Results tab is displayed.
- 3 On the Results tab tool bar, click the Edit View button in the Graph pane, and then click the Edit graph properties button 
- 4 On the **Graph Properties** dialog box, select the **Scale** tab.



- 5 Under **Scale and Limits**, select the **Axis Limits** for the graph:
 - Select **Default (Dynamic)** to accept the default limits
 - Select **Specify** to set the limits, and then enter the **Minimum** and **Maximum** values for the limits.
- 6 Under **Scale Type and Tick Marks**, select the **Tick Type** for the graph:
 - Select **Dynamic** to accept the default settings
 - Select **Specify** to define the number of ticks to display, and then select the type to display, and enter the associated value:
 - **Show Major ticks** and specify the number of major ticks to show.
 - **Show Minor ticks** and specify the number of minor ticks to show.
 - **Use logarithmic scale**
- 7 Click **OK** to save the scale modifications for the selected report.

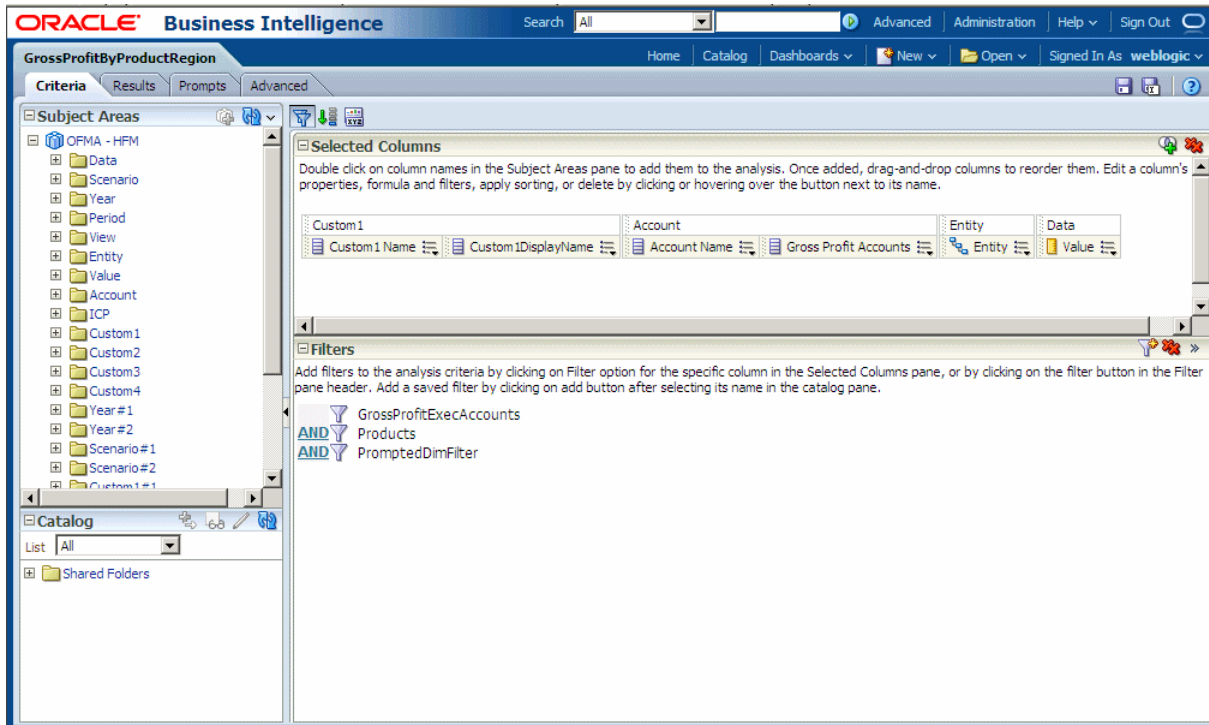
For additional information, see the *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition*.

Sorting Columns

From the Criteria tab, you can set a different sort on each column in a report.

- To sort report columns:
 - 1 On the Oracle BI EE Home screen, select **Dashboards**, then **OFMA**, and then **Oracle Financial Management Analytics**.
 - 2 Select the report for which you want to manage the columns, and then click **Edit**.
The Results tab is displayed.

3 Select the **Criteria** tab.



4 Under the **Selected Columns** pane, click the menu icon to the right of the name of the column name that you want to sort.

5 Select **Sort**, and then choose the sort method for the column:

- Sort Ascending
- Sort Descending
- Add Ascending Sort
- Add Descending Sort
- Clear Sort
- Clear All Sorts in All Columns

6 Click the **Save** button

Setting Number of Days on Process Management Report

You can set the number of days on the Process Management report to indicate the status of individual processes.

► To set the number of days:

- 1 On the Oracle BI EE Home screen, select **Dashboards**, then **OFMA**, and then **Oracle Financial Management Analytics**.

- 2 Select the Process Management tab.

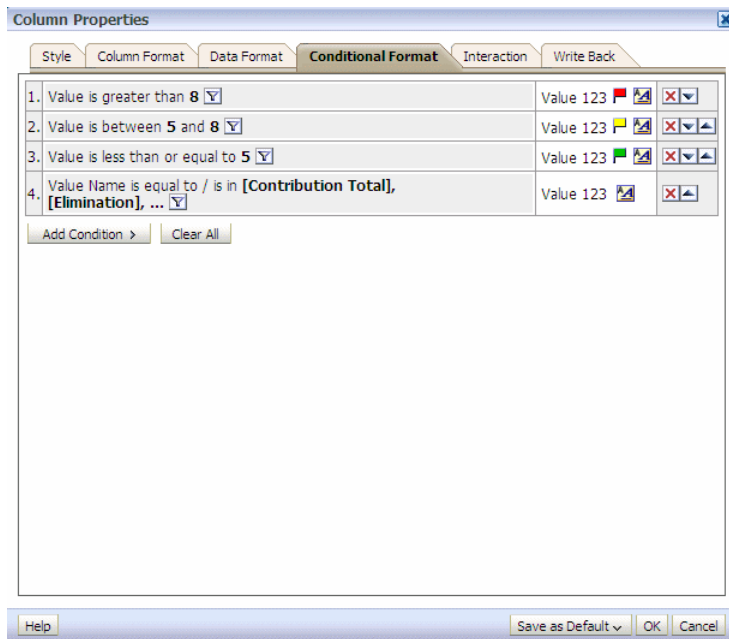
The Results tab is displayed.


- 3 Select the Process Management Metrics report, and then click **Edit**.

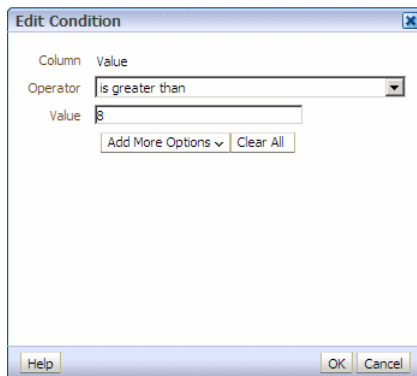
- 4 Select the **Criteria** tab.


- 5 Under the **Selected Columns** pane, in the **Data** column, click the menu icon .

- 6 Select **Column Properties**, and then select the **Conditional Format** tab.



- 7 On the Column Properties dialog box, for each condition, click the Edit Condition icon .




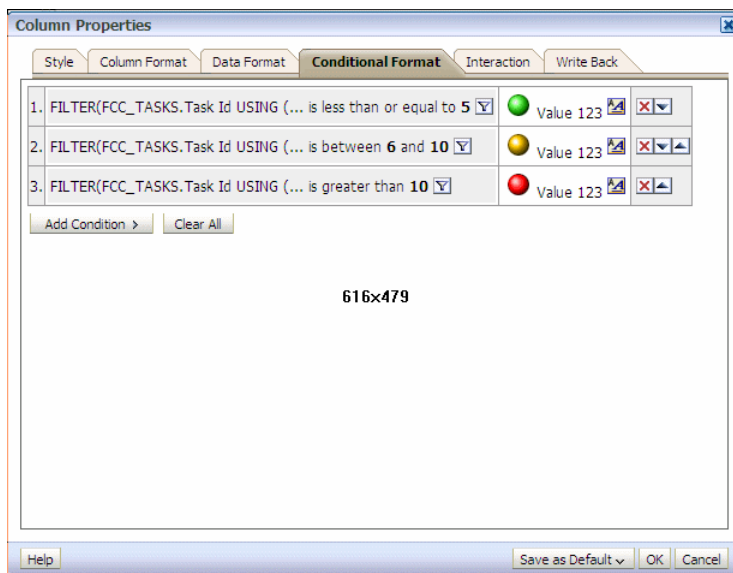
- 8 On the **Edit Condition** dialog box, set the values for the Process Management condition:
- Enter the required **Operator**, such as “Greater than,” “Less than” and so on.
 - Enter the **Value** as the number of days for the selected operator.
 - Click **OK**.
- 9 Repeat [step 7](#) and [step 8](#) for each condition listed on the dialog box. These values reflect the ranges (Good, Need Attention or Late) that are displayed on the Process Management report.
- 10 Click the Save button .


Formatting Conditions on the Close Schedule Summary

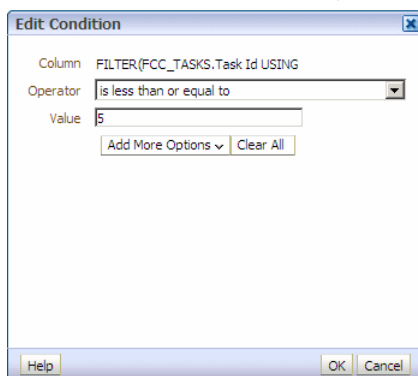
You can set the values for the status or condition of tasks reported on the Close Schedule Summary.

➤ To set status conditions for the Close Schedule Summary:


- 1 On the Oracle BI EE Home screen, select **Dashboards**, then **OFMA**, and then **Oracle Financial Management Analytics**.
- 2 Select the **Close Schedule** tab.
- 3 Select the **Schedule Summary** report, and then click **Edit**.
- 4 Select the **Criteria** tab.
- 5 Under the **Selected Columns** pane, in the **Condition** column, click the menu icon .
- 6 Select **Column Properties**, and then select the **Conditional Format** tab.



- 7 On the Column Properties dialog box, for each condition, click the Edit Condition icon .





- 8 On the **Edit Condition** dialog box, set the values for the Process Management condition:
 - a. Enter the required **Operator**, such as “Greater than,” “Less than” and so on.

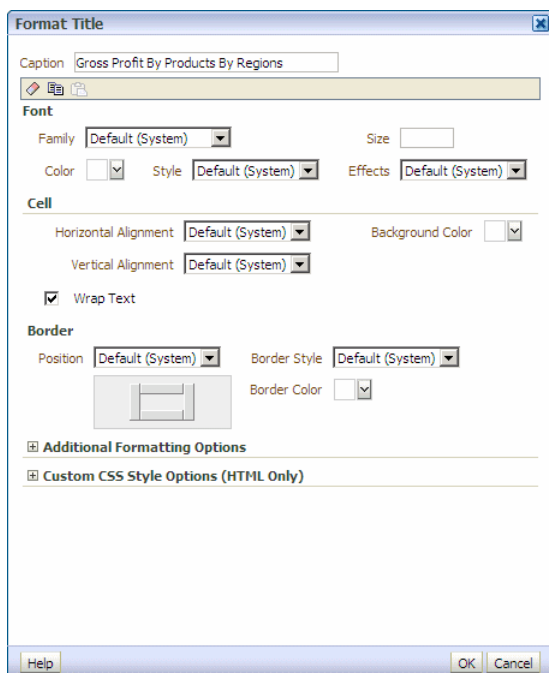
- b. Enter the **Value** as the number of days for the selected operator.
 - c. Click **OK**.
- 9 Repeat [step 7](#) and [step 8](#) for each condition listed on the dialog box. These values reflect the status of the tasks (On Time, Need Attention or Schedule Delayed) that are displayed on the Summary Schedule report.
- 10 Click the Save button 

Changing Report Names

You can change the name of a report, or other hardcoded strings, to reflect the requirements of your organization.

You must apply these changes to each report title that you want to modify.

- To modify report names:
- 1 On the Oracle BI EE Home screen, select **Dashboards**, then **OFMA**, and then **Oracle Financial Management Analytics**.
 - 2 Select the report for which you want to modify the name, and then click **Edit**.
 - 3 Select the **Results** tab.
 - 4 On the **Compound Layout** pane, click the Edit View icon  in the **Title** pane.
 - 5 Beside **Title**, click the Title icon 



The **Format Title** dialog box is shown. It contains the following sections:

- Caption:** A text field containing "Gross Profit By Products By Regions".
- Font:**
 - Family: **Default (System)**
 - Size:
 - Color:
 - Style: **Default (System)**
 - Effects: **Default (System)**
- Cell:**
 - Horizontal Alignment: **Default (System)**
 - Background Color:
 - Vertical Alignment: **Default (System)**
 - ☒ Wrap Text
- Border:**
 - Position: **Default (System)**
 - Border Style: **Default (System)**
 - Border Color:
- Additional Formatting Options:**
 - ☐ Custom CSS Style Options (HTML Only)

At the bottom are buttons for **Help**, **OK**, and **Cancel**.

- 6 Under **Caption**, enter the text that you want to display as the report title.
- 7 Click **Done**.

- 8 Click the Save button 

Adding Company Logo

You can add your organization's logo to the dashboards.

► To add the company logo to dashboards:

- 1 Post the .jpg file of the company logo to `fmap:images/` on the Oracle BI Presentation Server. The .jpg is the standard format for the graphic file.

Note: When running in a secured environment, only resources that are located on the Oracle BI Presentation Server may be used. These resources are referenced using a relative path prefixed with "fmap."

- 2 On the Oracle BI EE Home screen, select **Dashboards**, then **OFMA**, and then **Oracle Financial Management Analytics**.
- 3 Select the report on which you want to add the company logo, and then click **Edit**.
- 4 Select the **Results** tab.

- 5 On the **Compound Layout** pane, click the Edit View icon  in the **Title** pane.

- 6 Beside **Logo**, enter the path to the location of the corporate logo from [step 1](#), in the following format:

`fmap:images/<company_logo_name>.jpg`



- 7 Click **Done**.

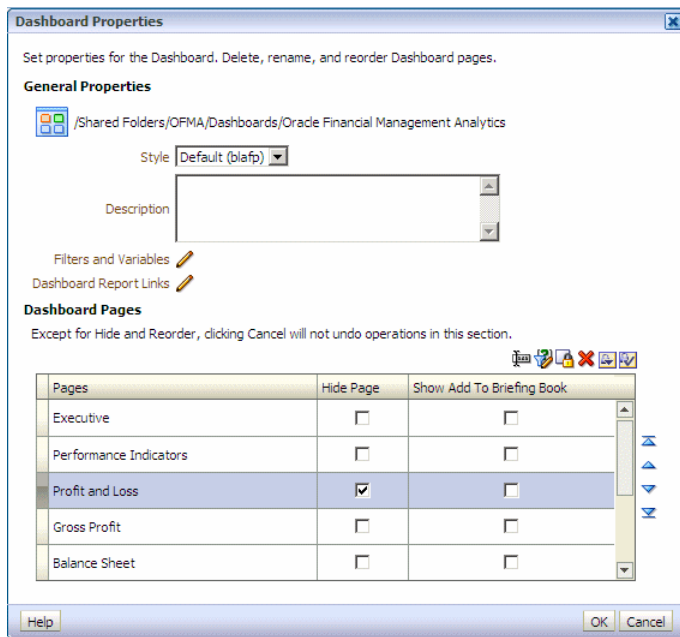
- 8 Click the Save button 


Hiding Dashboard Reports

You can hide specific dashboard reports that are not required.

► To hide a dashboard report:

- 1 On the Oracle BI EE Home screen, select **Dashboards**, then **OFMA**, and then **Oracle Financial Management Analytics**.
- 2 On the Dashboard tool bar, click the Page Options icon , and then select **Edit Dashboard**.
- 3 On the Edit Dashboard toolbar, click the Tools icon , and then select **Dashboard properties**.



- 4 On the Dashboard Properties dialog box, under **Dashboard Pages**, click **Hide Page** beside each dashboard that you want to hide.
- 5 Click **OK**.
- 6 On the Edit Dashboard toolbar, click the Save icon 



Performance Tuning

In This Appendix

Performance Tuning Documentation	87
Setting Caching for a Single BI Server	88
Setting Caches for a Clustered Environment	89
Turning Logging Off	90

Every instance of Oracle Financial Management Analytics is composed of a unique combination of applications, hardware, software, databases, customizations, and so on. With such diversity in installations, any changes to the current configuration, such as new hardware or software, may result in changes in performance.

After installing a new release or patch, or after making substantial changes within your environment, some tuning of these components is probably required.

Performance tuning is an iterative process. To maximize performance, all components in your installation should be maintained, tuned and monitored on an ongoing basis.

It is difficult to supply definitive tuning solutions that will work in every situation. For example, different versions or patches may exhibit slightly different behavior that needs to be managed. Depending on your environment, the interplay between components may yield different results. Customization of this product or others that share the same environment may affect results.

This appendix is designed for information purposes only, to suggest some areas for examination, and to direct you to information sources that may help you to fine-tune your installation.

Caution! Before experimenting with tuning, settings, and so on, back up your databases and models.

Performance Tuning Documentation

Some Oracle Business Intelligence Enterprise Edition documentation that may provide some areas to examine, or provide some tuning information are provided on the following table.

Table 7 Tuning Reference Documentation

Documentation	Sample Topics
<i>Oracle® Fusion Middleware Performance and Tuning Guide</i>	<ul style="list-style-type: none">● Cross-Component Tuning for SOA Suite● Logging Levels● JVM Tuning Parameters● Database Settings● Modifying SOA Configuration Parameters
<i>Oracle® Fusion Middleware Programming JDBC for Oracle WebLogic Server</i>	<ul style="list-style-type: none">● WebLogic Performance-Enhancing Features● Designing Your Application for Best Performance● How Pooled Connections Enhance Performance
<i>Oracle® Fusion Middleware System Administrator's Guide for Oracle Business Intelligence Enterprise Edition</i>	<ul style="list-style-type: none">● Managing Performance Tuning and Query Caching● Using Fusion Middleware Control to View Common Performance Metrics
<i>Oracle® Fusion Middleware Performance and Tuning for Oracle WebLogic Server</i>	<ul style="list-style-type: none">● Performance Tuning Roadmap● Monitor Disk and CPU Utilization● Locate Bottlenecks in Your System● Tune Your Application

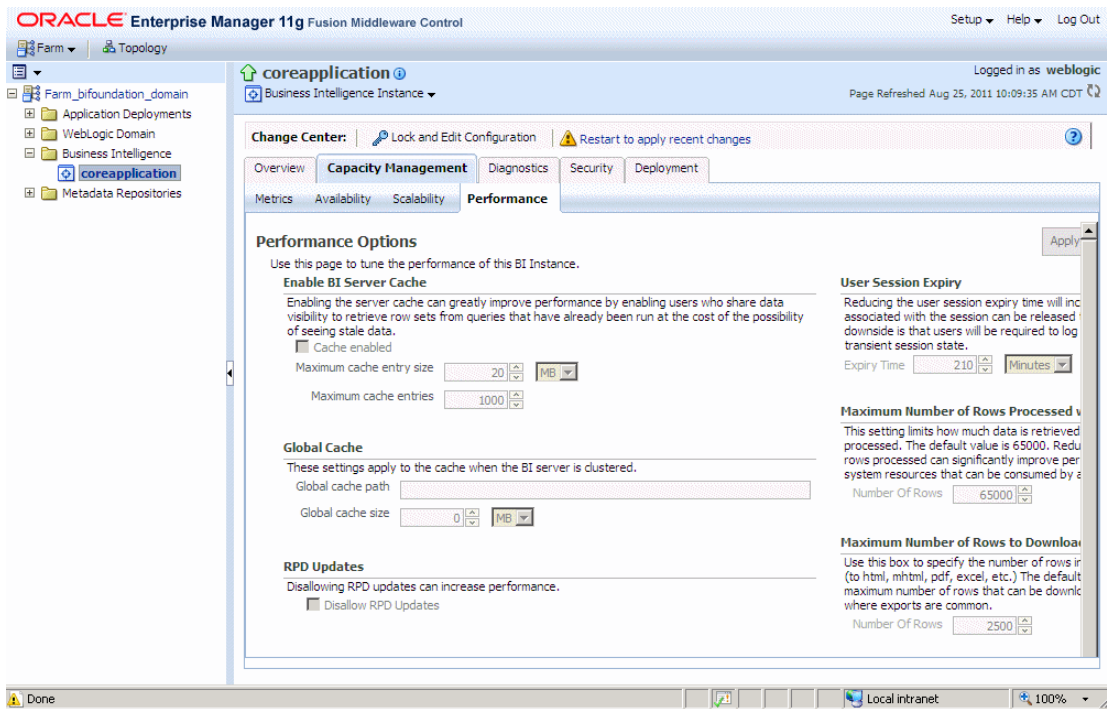
Setting Caching for a Single BI Server

By default, the Oracle BI Server maintains a local, disk-based cache of query result sets (query cache). The query cache dramatically decreases query response time by enabling the Oracle BI Server to satisfy many subsequent query requests without having to access back-end data sources.

Oracle recommends that caching be turned on. When setting the cache entry size and the number of cache entries, you should consider the amount of data that is being generated, and the frequency of changes to manage the affect on performance, while maintaining the information that you require.

► To set the BI Server cache:

- 1 In a browser, go to `http://<server name>:7001/em` to open Enterprise Manager.
- 2 In the left pane of Oracle Enterprise Manager, select **Business Intelligence**, and then the instance name, for example, **coreapplication**.
- 3 In the right pane, click the **Capacity Management** tab, and then the **Performance** tab to display the Performance options.



4 Under **Enable BI Server Cache**, click **Cache Enabled**.

The cache is enabled by default. To disable the cache, clear the checkbox.

5 Under **Maximum cache entry size**, enter the maximum size for a cache entry in MB. Potential entries that exceed this size are not cached. The default size is 20 MB.

6 Under **Maximum cache entries**, enter the maximum number of cache entries allowed in the query cache. Use this value to help manage your cache storage requirements. The default value is 1000.

7 Click **Apply**.

8 At the top of the screen, click **Restart to Apply Recent Changes**.

As a courtesy, you should ensure the restart will not affect other users. When the server is rebooted, the new caching requirements are applied.

Setting Caches for a Clustered Environment

In a clustered environment, Oracle BI Servers can be configured to access a shared cache called the global cache. The global cache resides on a shared file system storage device and stores purging events, seeding events (often generated by Agents), and result sets associated with seeding events.

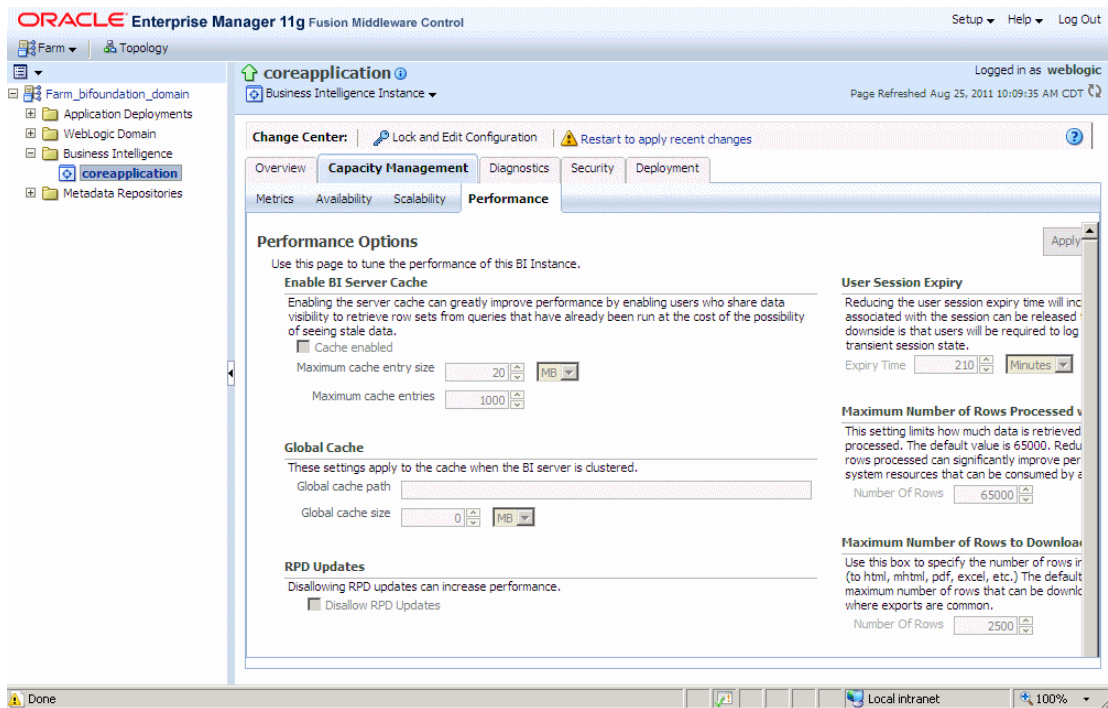
Each Oracle BI Server still maintains its own local query cache for regular queries.

► To set the BI Server cache in a clustered environment:

1 In a browser, go to `http://<server name>:7001/em` to open Enterprise Manager.

2 In the left pane of Enterprise Manager, select **Business Intelligence**, and then **coreapplication**.

- 3 In the right pane, click the **Capacity Management** tab, and then the **Performance** tab to display the Performance options.



- 4 Under **Global Cache**, enter the following information for the cache.

The cache is enabled by default. To disable the cache, clear the checkbox.

- In **Global cache path**, enter the path to the physical location for storing purging and seeding cache entries shared across the cluster. The location that you enter must reside on a shared file system that is accessible by all nodes in the cluster.
- In **Global cache size**, specify the maximum size of the global cache (for example, 700 MB). When this limit has been reached, potential new entries are not cached.

- 5 Click **Apply**.

- 6 At the top of the screen, click **Restart to Apply Recent Changes**.

As a courtesy, you should ensure the restart will not affect other users. When the server is rebooted, the new caching requirements are applied.

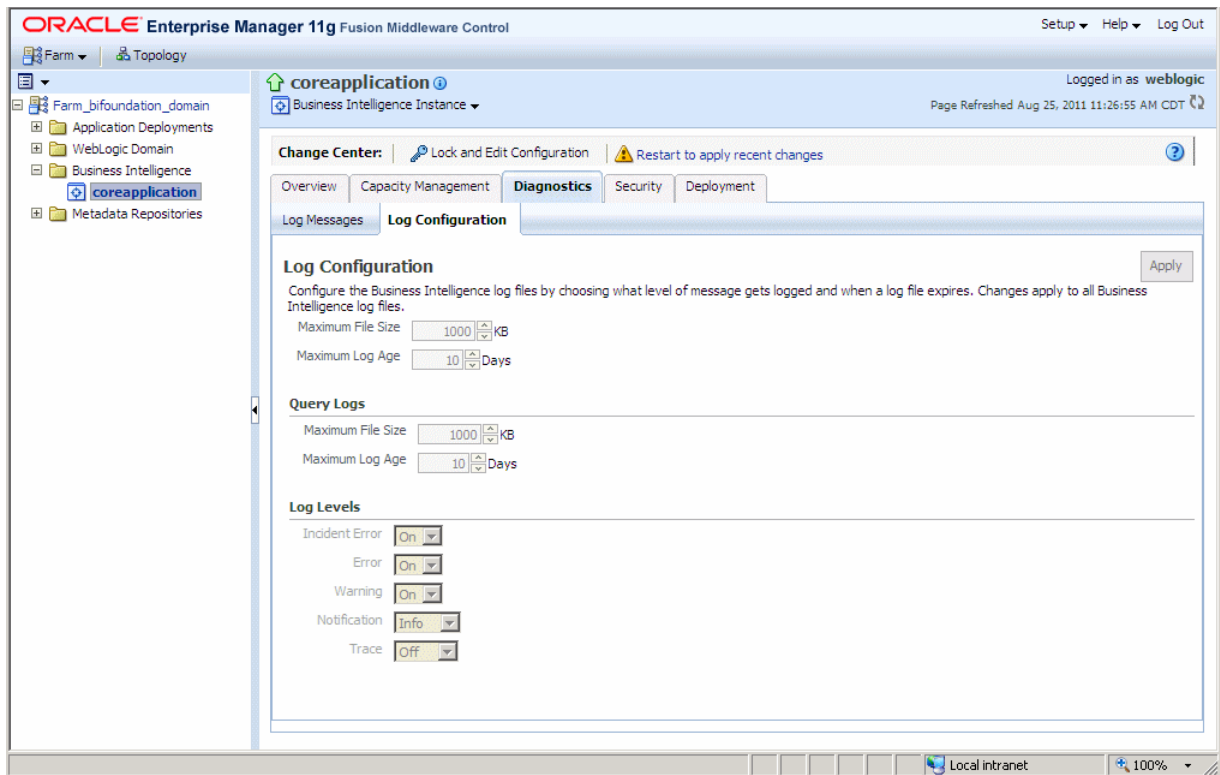
Turning Logging Off

In the interests of improved performance, Oracle recommends that logging be turned off by default. If Support requests logging to investigate an issue, it can easily be turned on.

► To turn logging off:

- 1 In a browser, go to `http://<server name>:7001/em` to open Enterprise Manager.
- 2 In the left pane of Oracle Enterprise Manager, select **Business Intelligence**, and then **coreapplication**.

- 3 In the right pane, click the **Diagnostics** tab, and then the **Log Configurations** tab to display the Log Performance options.



- 4 Under **Log Levels**, set each of the following log levels to Off:
- Incident Error
 - Error
 - Warning
 - Notification
 - Trace
- 5 Click **Apply**.
- 6 Click **Activate Changes**.
- 7 At the top of the screen, click **Restart to Apply Recent Changes**.

As a courtesy, you should ensure the restart will not affect other users. When the server is rebooted, logging is turned off.

Note: If you need to reset logging, repeat the procedure, but in [step 4](#) set the desired logging to On.

Glossary

action Provides functionality to navigate to related content or to invoke operations, functions or processes in external systems. You can include actions in analyses, dashboard pages, agents, scorecard objectives, scorecard initiatives, and KPIs. See also [action link](#).

Action Framework The Action Framework is a component of the Oracle BI EE architecture and includes a J2EE application called the Action Execution Service (AES) and actions-specific JavaScript functionality deployed as part of Oracle BI EE. The action framework also includes client-side functionality for creating actions and invoking certain action types directly from the browser.

action link A link to an action that you have embedded in an analysis, dashboard page, scorecard objective, scorecard initiative, or KPI that, when clicked, runs an associated action. See also [action](#).

ADF Business Intelligence Component Provides the developer the ability to include Oracle Business Intelligence catalog objects in ADF Applications. This component uses a SOAP connection to access the Oracle BI Presentation Catalog.

Admin Server Is part of the WebLogic domain, and runs the processes that manage Oracle Business Intelligence components. The Admin Server contains the Oracle WebLogic Server Administration Console, and Fusion Middleware Control. See also [Fusion Middleware Control](#) and [Managed Server](#).

agent Enables you to automate your business processes. You can use them to provide event-driven alerting, scheduled content publishing, and conditional event-driven action execution.

Agents can dynamically detect information-based problems and opportunities, determine the appropriate individuals to notify, and deliver information to them through a wide range of devices (e-mail, phones, and so on).

aggregate persistence A feature that automates the creation and loading of aggregate tables and their corresponding Oracle Business Intelligence metadata mappings to enable aggregate navigation.

aggregate table A table that stores precomputed results from measures that have been aggregated over a set of dimensional attributes. Each aggregate table column contains data at a given set of levels. For example, a monthly sales table might contain a precomputed sum of the revenue for each product in each store during each month. Using aggregate tables optimizes performance.

aggregation rule In an Oracle BI repository, a rule applied to a logical column or physical cube column that specifies a particular aggregation function to be applied to the column data, such as SUM.

In Presentation Services, users can see the rules that have been applied in the repository. Users can also change the default aggregation rules for measure columns.

alias table A physical table that references a different physical table as its source. Alias tables can be used to set up multiple tables, each with different keys, names, or joins, when a single physical table needs to serve in different roles. Because alias table names are included in physical SQL queries, you can also use alias tables to provide meaningful table names, making the SQL statements easier to read.

analysis A query that a user creates on the Criteria tab in Presentation Services. An analysis can optionally contain one or more filters or selection steps to restrict the results. See also [filter](#) and [selection step](#).

analysis criteria Consists of the columns, filters, and selection steps that you specify for an analysis. See also [analysis](#).

analysis prompt A prompt that is added to an analysis. When the user selects a prompt value, that value then determines the content that displays in the analysis containing the prompt, only. See [dashboard prompt](#) and [prompt](#).

attribute The details of a dimension in an Oracle BI repository. Attributes usually appear as columns of a dimension table.

attribute column In Presentation Services, a column that holds a flat list of values that are also known as members. No hierarchical relationship exists between these members, as is the case for members of a hierarchical column. Examples include ProductID or City. See [hierarchical column](#).

BI domain Contains configurable System components (the coreapplication) and Java components (the WebLogic domain), and also includes the Web-based management tools and applications that utilize resources.

A BI domain can be a set of middleware homes spread across one or more physical servers. See also [BI instance](#).

BI instance Refers to the System components (coreapplication) of a BI domain. See also [BI domain](#).

BI object A piece of business intelligence content that is created with Presentation Services and saved to the Oracle BI Presentation Catalog. Examples of BI objects include analyses, dashboards, dashboard pages, scorecards, and KPIs.

BI Search A search tool that resides outside of Presentation Services. BI Search is available from the Home Page after the Administrator adds a link to the BI Search URL. BI Search provides a mechanism for searching for objects in the Oracle BI Presentation Catalog that is similar to a full-text search engine.

bookmark link Captures the path to a dashboard page and all aspects of the page state. See [prompted link](#).

bridge table A table that enables you to resolve many-to-many relationships between two other tables.

briefing book See [Oracle BI Briefing Books](#).

business model Contains the business model definitions and the mappings from logical to physical tables. Business models are always dimensional, unlike objects in the Physical layer, which reflect the organization of the data sources. Each business model contains logical tables, columns, and joins.

Business Model and Mapping layer A layer of the Oracle BI repository that defines the business, or logical, model of the data and specifies the mapping between the business model and the Physical layer schemas. This layer can contain one or more business models.

The Business Model and Mapping layer determines the analytic behavior that is seen by users, and defines the superset of objects available to users. It also hides the complexity of the source data models.

business owner The person responsible for managing and improving the business value and performance of a KPI or scorecard object, such as an objective, cause and effect map, and so on.

catalog See [Oracle BI Presentation Catalog](#).

cause & effect map A component of a scorecard that lets you illustrate the cause and effect relationships of an objective. See also [Oracle Scorecard and Strategy Management](#).

chronological key A column in a time dimension that identifies the chronological order of the members within a dimension level. The key must be unique at its level.

Cluster Controller A process that serves as the first point of contact for new requests from Presentation Services and other clients. The Cluster Controller determines which Oracle BI Server in the cluster to direct the request to based on Oracle BI Server availability and load. It monitors the operation of servers in the cluster, including the Oracle BI Scheduler instances. The Cluster Controller is deployed in active-passive configuration.

column In an Oracle BI repository, columns can be physical columns, logical columns, or presentation columns.

In Presentation Services, indicates the pieces of data that an analysis will return. Together with filters and selection steps, columns determine what analyses will contain. Columns also have names that indicate the types of information that they contain, such as Account and Contact.

See also [analysis](#), [attribute column](#), [hierarchical column](#), and [measure column](#).

column filter See [filter](#).

column prompt A type of filter that allows you to build specific value prompts on a data column to either stand alone on the dashboard or analysis or to expand or refine existing dashboard and analysis filters. See also [prompt](#).

complex join A join in the Physical layer of an Oracle BI repository that uses an expression other than equals.

condition Objects that return a single Boolean value based on the evaluation of an analysis or of a key performance indicator (KPI). You use conditions to determine whether agents deliver their content and execute their actions, whether actions links are displayed in dashboard pages, or whether sections and their content are displayed in dashboard pages.

See also [action](#), [action link](#), [agent](#) and [key performance indicator \(KPI\)](#).

connection pool An object in the Physical layer of an Oracle BI repository that contains the connection information for a data source.

See also [Physical layer](#).

content designer The user who creates business intelligence objects such as analyses, dashboards, and scorecards.

contextual event action A pre-delivered action that utilizes the Action Framework to pass content from the business intelligence object to another region on an ADF page.

See also [action](#), [Action Framework](#), and [action link](#).

criteria See [analysis criteria](#).

cube An OLAP (online analytical processing) data structure that lets data be analyzed more quickly and with greater flexibility than structures in relational databases. Cubes are made up of measures and organized by dimensions. Cubes in multidimensional data sources roughly correspond to star schemas in relational database models.

currency prompt A prompt that allow the user to change the currency type that displays in the currency columns on an analysis or dashboard. See also [prompt](#).

custom view A component of a scorecard that lets you show a customized view of your business and strategy data. See also [Oracle Scorecard and Strategy Management](#).

dashboard An object that provides personalized views of corporate and external information. A dashboard consists of one or more pages. Pages can display anything that you can access or open with a Web browser, such as results of analyses, images, alerts from agents, and so on.

dashboard prompt A prompt that is added to the dashboard. When the user selects a prompt value, that value then determines the content that will display in all analyses included on the dashboard. See [analysis prompt](#) and

Dashboard URL Used for incorporating or referencing the content of a specific dashboard in external portals or applications. It has a number of forms and optional arguments that can be used to control its behavior.

data source name (DSN) A data structure that contains the information about a specific database, typically used by an ODBC driver to connect to the database. The DSN contains information such as the name, directory, and driver of the database.

Connection pool objects in the Physical layer of the Oracle BI repository contain DSN information for individual data sources.

database hint Instructions placed within a SQL statement that tell the database query optimizer the most efficient way to execute the statement. Hints override the optimizer's execution plan, so you can use hints to improve performance by forcing the optimizer to use a more efficient plan. Hints are only supported for Oracle Database data sources.

dimension A hierarchical organization of logical columns (attributes). One or more logical dimension tables may be associated with at most one dimension.

A dimension may contain one or more (unnamed) hierarchies. There are two types of logical dimensions: dimensions with level-based hierarchies (structure hierarchies), and dimensions with parent-child hierarchies (value hierarchies).

A particular type of level-based dimension, called a time dimension, provides special functionality for modeling time series data.

See also [hierarchy](#).

dimension table A logical table that contains columns used by a particular dimension. A dimension table cannot be a fact table. See also [fact table](#).

driving table A mechanism used to optimize the manner in which the Oracle BI Server processes multi-database joins when one table is very small (the driving table) and the other table is very large.

DSN See [data source name \(DSN\)](#).

Essbase A multidimensional database management system available from Oracle that provides a multidimensional database platform upon which to build business intelligence applications. Also referred to as Oracle's Hyperion Essbase.

event polling table Event polling tables (also called event tables) provide information to the Oracle BI Server about which physical tables have been updated. They are used to keep the query cache up-to-date. The Oracle BI Server cache system polls the event table, extracts the physical table information from the rows, and purges stale cache entries that reference those physical tables.

fact table In an Oracle BI repository, a logical table in the Business Model and Mapping layer that contains measures and has complex join relationships with dimension tables. See also [dimension table](#).

filter Criteria that are applied to attribute and measure columns to limit the results that are displayed when an analysis is run. For measure columns, filters are applied before the query is aggregated and affect the query and thus the resulting values.

See also [prompt](#) and [selection step](#)

foreign key A column or a set of columns in one table that references the primary key columns in another table.

fragmentation content The portion, or fragment, of the set of data specified in a logical table source when the logical table source does not contain the entire set of data at a given level. Fragmentation content is defined by the logical columns that are entered in the Fragmentation content box in the Content tab of the Logical Table Source dialog box.

Fusion Middleware Control Provides Web-based management tools that enable you to monitor and configure Fusion Middleware components.

global header An Oracle BI Presentation Services user interface object that contains links and options that allow the user to quickly begin a task or locate a specific object within the Presentation Catalog. The global header always displays in the Presentation Services user interface, thus allowing users to quickly access links and search the catalog without having to navigate to the Home Page or Catalog page.

Go URL Used to incorporate specific business intelligence results into external portals or applications. The Go URL is used when you add a result to your favorites or add a link to a request to your dashboard or external Web site. It has a number of forms and optional arguments that can be used to control its behavior.

hierarchical column In Presentation Services, a column that holds data values that are organized using both named levels and parent-child relationships. This column is displayed using a tree-like structure. Individual members are shown in an outline manner, with lower-level members rolling into higher-level members. For example, a specific day belongs to a particular month, which in turn is within a particular year. Examples include Time or Geography.

hierarchy In an Oracle BI repository, a system of levels in a logical dimension that are related to each other by one-to-many relationships. All hierarchies must have a common leaf level and a common root (all) level.

Hierarchies are not modeled as separate objects in the metadata. Instead, they are an implicit part of dimension objects.

See also [dimension](#), [logical level](#), and [presentation hierarchy](#).

hierarchy level In Presentation Services, an object within a hierarchical column that either rolls up or is rolled up from other levels. Corresponds to a presentation level in an Oracle BI repository.

See also [presentation level](#).

home page Provides an intuitive, task-based entry way into the functionality of Presentation Services. The Home page is divided into sections that allow you to quickly begin specific tasks, locate an object, or access technical documentation.

image prompt A prompt that provides an image with different areas mapped to specific values. The user clicks an image area to select the prompt value that populates the analysis or dashboard.

See also [prompt](#).

initialization block Used to initialize dynamic repository variables, system session variables, and nonsystem session variables. An initialization block contains the SQL statements that will be executed to initialize or refresh the variables associated with that block.

initiative Used in a scorecard, an initiative is a time-specific task or project that is necessary to achieve objectives. As such, you can use initiatives that support objectives as milestones as they reflect progress toward strategy targets.

See also [objective](#) and [Oracle Scorecard and Strategy Management](#).

Java components Fusion Middleware Control components that are deployed as one or more Java EE applications (and a set of resources) and are managed by Node Manager.

See also [Node Manager](#).

key performance indicator (KPI) A measurement that defines and tracks specific business goals and strategic objectives. KPIs often times roll up into larger organizational strategies that require monitoring, improvement, and evaluation. KPIs have measurable values that usually vary with time, have targets to determine a score and performance status, include dimensions to allow for more precise analysis, and can be compared over time for trending purposes and to identify performance patterns.

See also [Oracle Scorecard and Strategy Management](#).

KPI watchlist A method of distributing KPIs to end users. A watchlist is a collection of KPIs that are built by adding the KPIs stored in the catalog. After a KPI watchlist is built and saved, it is stored as a catalog object and can be added to dashboards and scorecards.

See also [key performance indicator \(KPI\)](#).

level See [hierarchy level](#).

logical display folder Folders used to organize objects in the Business Model and Mapping layer. They have no metadata meaning.

logical join Joins that express relationships between logical tables. Logical joins are conceptual, rather than physical, joins. In other words, they do not join to particular keys or columns. A single logical join can correspond to many possible physical joins.

logical layer See [Business Model and Mapping layer](#).

logical level In an Oracle BI repository, a component of a level-based hierarchy that either rolls up or is rolled up from other levels.

Parent-child hierarchies have implicit, inter-member levels between ancestors and descendants that are not exposed as logical level objects in the metadata. Although parent-child hierarchies also contain logical level objects, these levels are system generated and exist to enable aggregation across all members only.

See also [dimension](#) and [hierarchy](#).

Logical SQL The SQL statements that are understood by the Oracle BI Server. The Oracle BI Server Logical SQL includes standard SQL, plus special functions (SQL extensions) like AGO, TODATE, EVALUATE, and others.

Clients like Presentation Services send Logical SQL to the Oracle BI Server when a user makes a request. In addition, Logical SQL is used in the Business Model and Mapping layer to enable heterogeneous database access and portability. The Oracle BI Server transforms Logical SQL into physical SQL that can be understood by source databases.

logical table A table object in the Business Model and Mapping layer of an Oracle BI repository. A single logical table can map to one or more physical tables. Logical tables can be either fact tables or dimension tables.

See also [dimension table](#) and [fact table](#).

logical table source Objects in the Business Model and Mapping layer of an Oracle BI repository that define the mappings from a single logical table to one or more physical tables. The physical to logical mapping can also be used to specify transformations that occur between the Physical layer and the Business Model and Mapping layer, as well as to enable aggregate navigation and fragmentation.

Managed Server An individual J2EE application container (JMX MBean container). It provides local management functions on individual hosts for Java components and System components contained within the local middleware home, and refers to the Admin Server for all of its configuration and deployment information.

See also [Admin Server](#) and [Fusion Middleware Control](#).

measure column A column that can change for each record and can be added up or aggregated in some way. Typical measures are sales dollars and quantity ordered. Measures are calculated from data sources at query time.

Measure columns are displayed in the Oracle BI repository, usually in fact tables, or in Presentation Services.

metadata Data about data. Metadata objects include the descriptions of schemas (such as tables, columns, data types, primary keys, foreign keys, and so on) and logical constructs (like fact tables, dimensions, and logical table source mappings).

The Oracle BI repository is made up of the metadata used by the Oracle BI Server to process queries.

metadata dictionary A static set of XML documents that describe metadata objects, such as a column, including its properties and relationships with other metadata objects. A metadata dictionary can help users obtain more information about metrics or attributes for repository objects.

mission statement A statement in a scorecard that specifies the key business goals and priorities that are required to achieve your vision.

See also [Oracle Scorecard and Strategy Management](#) and [vision statement](#).

multi-database join A join between two tables in an Oracle BI repository, where each table resides in a different database.

Node Manager A daemon process that provides remote server start, stop, and restart capabilities when Java processes become unresponsive or terminate unexpectedly.

See also [Java components](#).

object properties Information about an object and attributes that the owner can assign to an object. Examples of properties include name, description, date stamps, read-only access, and do not index flag.

See also [permissions](#).

objective A required or desired outcome in a scorecard that forms your corporate strategy.

See also [initiative](#) and [Oracle Scorecard and Strategy Management](#).

OCI See [Oracle Call Interface \(OCI\)](#).

ODBC See [Open Database Connectivity \(ODBC\)](#).

offline mode In the Oracle BI Administration Tool, a mode where a repository builder can edit a repository that is not loaded into the Oracle BI Server.

online mode In the Oracle BI Administration Tool, a mode where a repository builder can edit a repository while it is available for query operations. Online mode also allows user session monitoring for users connected to the subject areas in the repository.

opaque view A Physical layer table that consists of a SELECT statement. In the Oracle BI repository, opaque views appear as view tables in the physical databases, but the view does not actually exist.

Open Database Connectivity (ODBC) A standard interface used to access data in both relational and non-relational databases. Database applications can use ODBC to access data stored in different types of database management systems, even if each database uses a different data storage format and programming interface.

OPMN See [Oracle Process Manager and Notification Server \(OPMN\)](#).

Oracle BI Administration Tool A Windows application that is used to create and edit Oracle BI repositories. The Administration Tool provides a graphical representation of the three parts of a repository: the Physical layer, Business Model and Mapping layer, and the Presentation layer.

Oracle BI Briefing Books A collection of static or updatable snapshots of dashboard pages, individual analyses, and BI Publisher reports. You can download briefing books in PDF or MHTML format for printing and viewing. You also can update, schedule, and deliver briefing books using agents.

Oracle BI JavaHost A service that gives Presentation Services the ability to use functionality that is provided in Java libraries to support components such as graphs. The services are provided based on a request-response model. Oracle BI Logical SQL View Object

Oracle BI Logical SQL View Object Provides the developer the ability to create a Logical SQL statement to access the Oracle BI Server and fetch business intelligence data and bind it to native ADF components for inclusion on an ADF page. This view object uses a BI JDBC connection to the Oracle BI Server.

Oracle BI Presentation Catalog Stores business intelligence objects, such as analyses and dashboards, and provides an interface where users create, access, and manage objects, and perform specific object-based tasks (for example, export, print, and edit). The catalog is organized into folders that are either shared or personal.

Oracle BI Presentation Services Provides the framework and interface for the presentation of business intelligence data to Web clients. It maintains a Presentation Catalog service on the file system for the customization of this presentation framework. It is a standalone process and communicates with the Oracle BI Server using ODBC over TCP/IP. It consists of components that are known as Answers, Delivers, and Interactive Dashboards.

See also [Open Database Connectivity \(ODBC\)](#); [Oracle BI Server](#); [Oracle BI Presentation Catalog](#); [Oracle BI Presentation Services server](#).

Oracle BI Presentation Services server The Oracle BI Web server that exchanges information and data with the Oracle BI Server.

Oracle BI Publisher A J2EE application that provides enterprise-wide publishing services in Oracle Business Intelligence. It generates highly formatted, pixel-perfect reports.

See also [report](#).

Oracle BI Publisher report See [report](#).

Oracle BI repository A file that stores Oracle Business Intelligence metadata. The metadata defines logical schemas, physical schemas, physical-to-logical mappings, aggregate table navigation, and other constructs. The repository file has an extension of .rpd. Oracle BI repositories can be edited using the Oracle BI Administration Tool.

See also [metadata](#) and [Oracle BI Administration Tool](#).

Oracle BI Scheduler An extensible scheduling application for scheduling results to be delivered to users at specified times. It is the engine behind the Oracle BI Delivers feature.

See also [results](#).

Oracle BI Server A standalone process that maintains the logical data model that it provides to Presentation Services and other clients through ODBC. Metadata is maintained for the data model in a local proprietary file called the repository file. The Oracle BI Server processes user requests and queries underlying data sources.

Oracle BI Server XML API Provides utilities to create a generic, XML-based representation of the Oracle BI repository metadata. This XML file version of the repository can be used to programmatically modify the metadata. The Oracle BI Server XML API objects correspond to metadata repository objects in an RPD file. These objects are not the same as Oracle BI Presentation Catalog XML objects.

Oracle Business Intelligence Session-Based Web Services An API that implements SOAP. These Web services are designed for programmatic use, where a developer uses one Web service to invoke many different business intelligence objects. These Web services provide functionality on a wide range of Presentation Services operations. These Web services allow the developer to extract results from Oracle BI Presentation Services and deliver them to external applications, perform Presentation Services management functions, and execute Oracle Business Intelligence alerts (known as Intelligent Agents).

See also [Oracle Business Intelligence Web Services for SOA](#).

Oracle Business Intelligence Web Services See [Oracle Business Intelligence Session-Based Web Services](#) and [Oracle Business Intelligence Web Services for SOA](#).

Oracle Business Intelligence Web Services for SOA Contains three Web services, ExecuteAgent, ExecuteAnalysis, and ExecuteCondition, which are hosted by the bimiddleware J2EE application. These web services are designed to enable developers to use third-party Web services clients (for example, Oracle SOA Suite) to browse for and include business intelligence objects in service oriented architecture components.

See also [Oracle Business Intelligence Session-Based Web Services](#).

Oracle Call Interface (OCI) A connection interface that the Oracle BI Server can use to connect to Oracle Database data sources. You should always use OCI when importing metadata from or connecting to an Oracle Database.

Oracle Process Manager and Notification Server (OPMN) A process management tool that manages all System components (server processes), and supports both local and distributed process management, automatic process recycling and the communication of process state (up, down, starting, stopping). OPMN detects process unavailability and automatically restarts processes).

See also [System components](#).

Oracle Scorecard and Strategy Management A performance management tool that lets you describe and communicate your business strategy. You can drive and assess your corporate strategy and performance from the top of your organization down, or from the bottom up.

Oracle Technology Network (OTN) A repository of technical information about Oracle's products where you can search for articles, participate in discussions, ask the user community technical questions, and search for and download Oracle products and documentation.

parent-child hierarchy A hierarchy of members that all have the same type. All the dimension members of a parent-child hierarchy occur in a single data source. In a parent-child hierarchy, the inter-member relationships are parent-child relationships between dimension members.

See also [dimension](#).

parent-child relationship table A table with values that explicitly define the inter-member relationships in a parent-child hierarchy. Also called a closure table.

pass-through calculation A calculation that will not be computed by the Oracle BI Server but will instead be passed to another data source. Enables advanced users to leverage data source features and functions without the need to modify the Oracle BI repository.

permissions Specify which users can access an object, as well as limit how users can interact with an object. Examples of permissions include write, delete, and change permissions.

See [object properties](#).

perspective A category in your organization with which to associate initiatives, objectives, and KPIs in a scorecard. A perspective can represent a key stakeholder (such as a customer, employee, or shareholder/financial) or a key competency area (such as time, cost, or quality).

See also [initiative](#), [key performance indicator \(KPI\)](#), [objective](#), and [Oracle Scorecard and Strategy Management](#).

physical catalog An object in the Physical layer of a repository that groups different schemas. A catalog contains all the schemas (metadata) for a database object.

physical display folder Folders that organize objects in the Physical layer of an Oracle BI repository. They have no metadata meaning.

physical join Joins between tables in the Physical layer of an Oracle BI repository.

Physical layer A layer of the Oracle BI repository that contains objects that represent physical data constructs from back-end data sources. The Physical layer defines the objects and relationships available for writing physical queries. This layer encapsulates source dependencies to enable portability and federation.

physical schema An object in the Physical layer of an Oracle BI repository that represents a schema from a back-end database.

physical table An object in the Physical layer of an Oracle BI repository, usually corresponding to a table that exists in a physical database.

See also [Physical layer](#).

presentation hierarchy An object in the Presentation layer of an Oracle BI repository that provides an explicit way to expose the multidimensional model in Presentation Services and other clients. Presentation hierarchies expose analytic functionality such as member selection, custom member groups, and asymmetric queries. Users can create hierarchy-based queries using presentation hierarchies.

In Presentation Services, presentation hierarchies are displayed as hierarchical columns.

See also [hierarchical column](#) and [presentation level](#).

Presentation layer Provides a way to present customized, secure, role-based views of a business model to users. It adds a level of abstraction over the Business Model and Mapping layer in the Oracle BI repository. The Presentation layer provides the view of the data seen by users who build analyses in Presentation Services and other client tools and applications.

See also [Business Model and Mapping layer](#).

presentation level In the Oracle BI repository, a component of a presentation hierarchy that either rolls up or is rolled up from other levels. Presentation levels are displayed as levels within hierarchical columns in Presentation Services.

See also [hierarchy level](#) and [presentation hierarchy](#).

Presentation Services See [Oracle BI Presentation Services server](#).

Presentation Services server See [Oracle BI Presentation Services server](#).

presentation table An object in the Presentation layer of an Oracle BI repository that is used to organize columns into categories that make sense to the user community. A presentation table can contain columns from one or more logical tables. The names and object properties of the presentation tables are independent of the logical table properties.

primary key A column (or set of columns) where each value is unique and identifies a single row of a table.

process instance A unique process on an individual workstation that is associated with a BI instance.

See also [BI instance](#).

prompt A type of filter that allows the content designer to build and specify data values or the end user to choose specific data values to provide a result sets for an individual analysis or multiple analyses included on a dashboard or dashboard page. A prompt expands or refines existing dashboard and analysis filters.

The types of prompts are column prompts, currency prompts, image prompts, and variable prompts.

See also [column prompt](#), [currency prompt](#), [filter](#), [image prompt](#), and [variable prompt](#).

prompted link Captures the path to a dashboard page and a simplified presentation of the dashboard prompt.

See [bookmark link](#).

query Contains the underlying SQL statements that are issued to the Oracle BI Server. You do not have to know a query language to use Oracle Business Intelligence.

query cache A facility to store query results for use by other queries.

ragged hierarchy See [unbalanced hierarchy](#).

report The response returned to the user from the execution of a query created using Oracle BI Publisher. Reports can be formatted, presented on a dashboard page, saved in the Oracle BI Presentation Catalog, and shared with other users.

See also [analysis](#).

repository See [Oracle BI repository](#).

repository variable See [variable](#).

results The output returned from the Oracle BI Server for an analysis.

See also [analysis](#).

scorecard See [Oracle Scorecard and Strategy Management](#).

selection step A choice of values that is applied after the query is aggregated that affects only the members displayed, not the resulting aggregate values. Along with filters, selection steps restrict the results for an analysis.

See also [analysis](#) and [filter](#).

session variable See [variable](#).

skip-level hierarchy A hierarchy where some members do not have a value for a particular ancestor level. For example, in the United States, the city of Washington in the District of Columbia does not belong to a state. The expectation is that users can still navigate from the country level (United States) to Washington and below without the need for a state.

See also [hierarchy](#).

snowflake schema A dimensional schema where one or more of the dimensions are partially or completely normalized.

SQL See [structured query language \(SQL\)](#).

star schema A relational schema that allows dimensional analysis of historical information. Star schemas have one-to-many relationships between the logical dimension tables and the logical fact table. Each star consists of a single fact table joined to a set of denormalized dimension tables.

strategy map A component of a scorecard that shows how the objectives that have been defined for a scorecard and the KPIs that measure their progress are aligned by perspectives. It also shows cause and effect relationships.

See also [Oracle Scorecard and Strategy Management](#).

strategy tree A component of a scorecard that shows an objective and its supporting child objectives and KPIs hierarchically in a tree diagram.

See also [Oracle Scorecard and Strategy Management](#)

structured query language (SQL) A standard programming language for querying and modifying data. Oracle Business Intelligence supports standard SQL-92 with several value-added proprietary extensions.

See also [Logical SQL](#).

subject area In an Oracle BI repository, an object in the Presentation layer that organizes and presents data about a business model. It is the highest-level object in the Presentation layer and represents the view of the data that users see in Presentation Services. Oracle BI repository subject areas contain presentation tables, presentation columns, and presentation hierarchies.

In Presentation Services, subject areas contain folders, measure columns, attribute columns, hierarchical columns, and levels.

System components Server processes (not Java applications) that are managed by the Oracle Process Manager and Notification server (OPMN).

See also [Oracle Process Manager and Notification Server \(OPMN\)](#).

transformation Work that is performed on data when moving from a database to another location (sometimes another database). Some transformations are typically performed on data when it is moved from a transaction system to a data warehouse system.

unbalanced hierarchy A hierarchy where the leaves do not have the same depth. For example, an organization may choose to have data for the current month at the day level, data for the previous at the month level, and data for the previous five years at the quarter level.

See also [hierarchy](#).

value hierarchy See [parent-child hierarchy](#).

variable Objects in an Oracle BI repository that are used to streamline administrative tasks and dynamically modify metadata content to adjust to a changing data environment.

Variables are of the following types:

There are two types of variables: Repository variables have a single value at any point in time. Repository variables may be static and dynamic. Session variables are created and assigned a value when each user logs on. There are two types of session variables: system and non-system.

variable prompt Allows the user to select a value specified in the variable prompt to display on the dashboard. A variable prompt is not dependent upon column data, but allows you to manipulate, for example add or multiply, the column data on an analysis.

See also [prompt](#).

virtual physical table A physical table that is made from a stored procedure or a SELECT statement. Creating virtual tables can provide the Oracle BI Server and the underlying databases with the proper metadata to perform some advanced query requests.

vision statement A short statement in a scorecard that describes what your organization wants to become sometime in the future. For example, it might be to become the most successful business in the South America Polypropylene Market.

See also [mission statement](#) and [Oracle Scorecard and Strategy Management](#).

WebLogic domain Contains Java components that are configured to participate in the servicing of SOAP, HTTP, and other forms of requests.

WebLogic Scripting Tool (WLST) A command-line scripting interface that enables you to configure, manage, and persist changes to WebLogic Server instances and domains and to monitor and manage server runtime events.

XML API See [Oracle BI Server XML API](#).

Index

Shared Services, [11](#)

A

Account dimension, [21](#)
 account groups, [49](#)
 Balance Sheet, [54](#)
 Balance Sheet Metrics, [54](#)
 Cash Flow, [55](#)
 Cash Flow Executive, [55](#)
 Gross Profit, [55](#)
 Income, [55](#)
 Performance Indicator, [55](#)
 Profit and Loss, [55](#)
 Profit and Loss Indicators Executive, [55](#)
 Schedule Summary, [55](#)
 account hierarchy, [49](#)
 application name
 setting in the RPD file, [66](#)
 architecture, [17](#)

B

Balance Sheet, [54](#)
 Balance Sheet Dashboard, [53](#)
 Balance Sheet Metrics, [54](#)
 BI Server
 cache settings, [88](#)
 BMM. See Business Model and Mapping layer, [22](#)
 Business Model and Mapping layer (BMM), [22](#)

C

cache settings
 clustered environment, [89](#)
 single BI server, [88](#)
 Cash Flow, [55](#)
 Cash Flow Dashboard, [53](#)
 Cash Flow Executive, [55](#)

catalog, [23](#)
 default location, [49](#)
 location, [49](#)
 uploading, [60](#)
 ClassType property, [21](#)
 Close Schedule Summary report
 formatting conditions, [83](#)
 clustered environment
 global cache settings, [89](#)
 columns
 sorting, [80](#)
 command
 startall, [74](#)
 stopall, [74](#)
 company logo, [85](#)
 complete installation, [32](#)
 components, [17](#), [28](#)
 supported versions, [28](#)
 conditions
 Close Schedule Summary, [83](#)
 configuration, [47](#)
 manual restart, [74](#)
 restarting, [47](#)
 running the configuration utility, [49](#)
 selecting dimensions and members, [49](#)
 connection pool
 setting the parameters, [47](#), [62](#)
 Consistency Check Manager, [20](#)
 Criteria tab, [79](#)
 currency, [43](#)
 custom dashboard, [79](#)
 Custom dimension, [21](#)
 custom dimensions
 renaming, [47](#), [66](#)
 custom installation, [37](#)
 customization
 adding company logo, [85](#)
 changing report name, [84](#)

- Close Schedule Summary, [83](#)
- hiding dashboard reports, [85](#)
- scaling financial values, [79](#)
- setting number of days on Process Management report, [81](#)
- sorting columns, [80](#)

D

- dashboards
 - Balance Sheet, [53](#)
 - Cash Flow, [53](#)
 - customizing, [79](#)
 - Executive, [53](#), [57](#)
 - Gross Profit, [53](#)
 - hiding, [85](#)
 - Performance Indicator, [53](#)
 - Profit and Loss, [53](#)
- data security, [11](#)
- data sources
 - OPMN, [59](#)
- database repository, [28](#)
- database tuning, [87](#)
- default installation path, [32](#)
- default password, [20](#)
- defaults
 - location, [49](#)
 - Point of View, [58](#)
 - setting in the RPD file, [47](#)
- Description property, [21](#)
- dimension
 - entity, [52](#)
- dimensions
 - Accounts, [53](#)
 - Product, [56](#)
 - renaming custom dimensions, [47](#), [66](#)
 - standard Financial Management, [21](#)
- documentation
 - library link, [9](#)
 - related, [9](#)

E

- Entity dimension, [21](#), [52](#)
- Executive Dashboard, [53](#), [57](#)

F

- FCC_DELAY_BOTTLENECK, [71](#)

- FCC_DELAYED_TASK_PREDECESSORS, [71](#)
- FCC_FAN_OUT_BOTTLENECK, [71](#)
- FCC_PRIOR_PERIOD_ANALYSIS, [71](#)
- FCC_SCHEDULE_COMPARISON, [71](#)
- FCM_OFMA table, [70](#)
- Financial Close Management
 - views, [71](#)
- financial values
 - scaling, [79](#)
- FinancialManagementAnalytics folder, [23](#)

G

- Gen (generation) property, [21](#)
- global cache settings, [89](#)
- Gross Profit, [55](#)
- Gross Profit by Product by Region, [53](#)
- Gross Profit Dashboard, [53](#), [57](#)

H

- hardware prerequisites, [27](#)

I

- Income, [55](#)
- Income by Regions, [53](#)
- installation, [31](#)
 - complete, [32](#)
 - configuration, [47](#)
 - custom, [37](#)
 - default path, [32](#)
 - hardware and software prerequisites, [27](#)
 - uninstall, [42](#)
- Intercompany (ICP) dimension, [21](#)

L

- language, [43](#)
- launch Oracle Financial Management Analytics, [77](#)
- layer
 - Business Model and Mapping , [22](#)
 - Physical, [20](#)
 - Presentation, [22](#)
- Level property, [21](#)
- link to documentation library, [9](#)
- logical tables, [22](#)
- login URL, [77](#)
- logo, [85](#)

M

member properties, 21
merge repositories, 23

N

Name property, 21
Net Cash Flow, 53

O

OPMN, 59
Oracle BI EE
 manual restart, 74
 related documentation, 9
Oracle BI Presentation Catalog, 23

P

parameters
 connection pool, 62
Parent Key property, 21
partial installation, 37
password, 20
Performance Indicator, 55
Performance Indicator Dashboard, 53
performance tuning, 87
Period dimension, 21
Physical layer, 20
 member properties, 21
 standard dimensions, 21
Point of View, 53, 58
pool parameters, 47
POV. *See* Point of View
prerequisites
 hardware, 27
 software, 27
Presentation layer, 22
Process Management Report
 setting number of days, 81
Profit and Loss, 53, 55
Profit and Loss Indicators by Products, 53
Profit and Loss Indicators Executive, 55
Prompts tab, 79
properties, 21

R

remove installation, 42

renaming custom dimensions, 47
Report Criteria, 79
reports
 changing name, 84
 Gross Profit by Product by Region, 53
 hiding, 85
 Income by Regions, 53
 Income by Sales Channel, 53
 Net Cash Flow, 53
 Profit and Loss Indicators by Products, 53
 scaling financial values, 79
 setting number of days, 81
 sorting columns, 80
repository, 28
 Business Modeli and Mapping, 22
 location, 49
 merging, 22, 23
 Physical layer, 20
 Presentation layer, 22
 setting defaults, 47, 69
 setting Financial Management Application name, 66
 uploading, 60
Repository File, 20
repository file
 consistency check, 20
 default password, 20
 warning messages, 20
Results tab, 79
rpd file. . *See* Repository File

S

scale financial values, 79
Scenario dimension, 21
Schedule Comparison, 71
Schedule Roadblocks, 71
Schedule Summary, 55
security, 11
setting defaults in the RPD file, 47
ShortName property, 21
software, 28
software prerequisites, 27
sort columns, 80
Sort Order property, 21
standard dimensions, 21
start Oracle Financial Management Analytics, 77
startall command, 74

stopall command, [74](#)
supported component versions, [28](#)

T

tuning performance, [87](#)

U

uninstall, [42](#)
upload
 catalog, [60](#)
 repository, [60](#)
URL, [77](#)
users
 authorization, [11](#)

V

Value dimension, [21](#)
View dimension, [21](#)
views
 FCC_DELAY_BOTTLENECK, [71](#)
 FCC_DELAYED_TASK_PREDECESSORS, [71](#)
 FCC_FAN_OUT_BOTTLENECK, [71](#)
 FCC_PRIOR_PERIOD_ANALYSIS, [71](#)
 FCC_SCHEDULE_COMPARISON, [71](#)
 setting, [71](#)

W

warning messages on repository file, [20](#)
web catalog, [23](#)
WORKDAYS, [70](#)

Y

Year dimension, [21](#)