

Oracle Fusion Cloud Procurement

**Creating and Administering
Analytics and Reports for
Procurement**

24D



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Get Help

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1 Overview

About This Guide

If you administer or work with business intelligence (BI) in Oracle Applications Cloud, this guide is for you. It provides an overview of Oracle Transactional Business Intelligence and covers common BI features in your application.

For example, you can create analyses in the Reports and Analytics work area, personalize the infolets on your home page, or configure flexfields for use in analytics.

Overview of Transactional Business Intelligence

You use Oracle Transactional Business Intelligence (OTBI) to analyze your business and take action with embedded and ad hoc analysis of your transactional data.

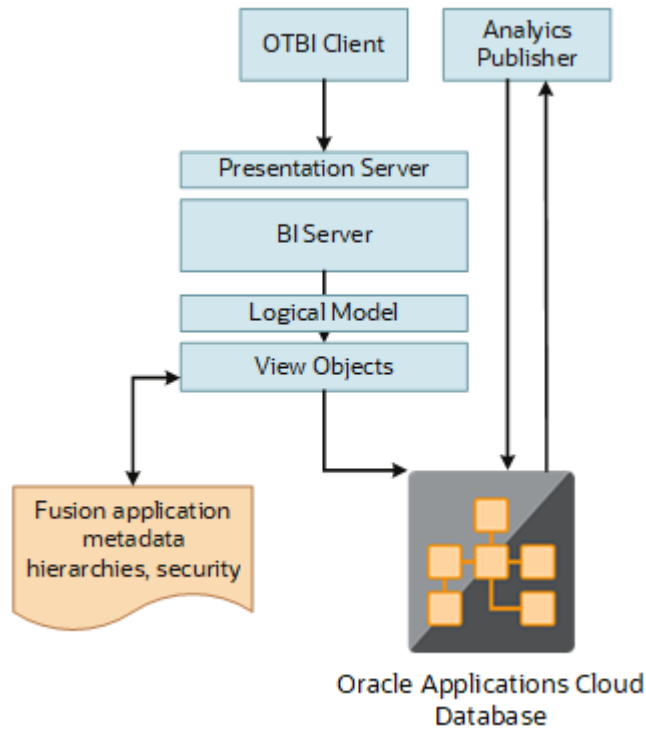
Key metrics and attributes of your business and organization are organized into subject areas of data you use as building blocks to answer your business questions.

- Use embedded analyses and reports to gain insights and report on key business metrics
- Build ad hoc analyses, reports, and dashboards.
- Create catalog folders and define who has access to what in the catalog.
- Organize your analytics in dashboards and embed them in your work areas.

Architecture

OTBI integrates with Application Development Framework (ADF) to run your real-time analysis of your business subject areas.

The BI Server creates physical queries based on metadata mappings between the subject areas you work with in your analysis and ADF view objects and their underlying database tables. The Presentation Server compiles and formats the results in the client or as embedded analytics.



Here's the OTBI architecture.

BI Objects and Tools

Here are some of the components and the objects they support.

Catalog Object	Description	Component or Tool
Analysis	Analyses are a selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.	Analytics Answers
Dashboard	Dashboards organize analytical content and catalog objects, and present them in a meaningful way.	Dashboard Builder
Dashboard Prompt	Dashboard prompts allow users to filter dashboard content by selecting from provided values.	Analytics Answers and Dashboard Builder
Filter	Filters limit the results that are displayed when an analysis is run.	Analytics Publisher
Agent	Agents deliver scheduled analytics and other content and notifications.	Delivers
Report	Reports present data in pixel-perfect printable format for distribution.	Analytics Publisher

Catalog Object	Description	Component or Tool
Data Model	Data models define the data source for reports.	Analytics Publisher
Subtemplate	Subtemplates are reusable formatting definitions for reports.	RTF or XSL editor

Note: You can't change privileges for the components, for example by changing which roles are assigned to access Dashboards or Analytics Publisher. Any changes made to privileges in the Administration Manage Privileges page aren't preserved during any upgrade.

The catalog stores the objects in a folder structure of individual files, organized hierarchically by product family.

- Shared folders (parent)
- Product family, for example, Financials
- Product, for example, Payables
- Report groups, for example, Invoices
- Dashboard reports
- Data models
- Report components
- Analytics Publisher reports
- Prompts

Some Oracle Transactional Business Intelligence components aren't available in Oracle Applications Cloud:

- BI Server: Processes user requests and queries in underlying data sources.
- Catalog Manager: Manages catalog and objects.
- Administration Tool: Manages metadata repository that defines the logical structure and physical data sources for analytic subject areas.

Related Topics

- [More About Oracle Transactional Business Intelligence Components](#)

More About Oracle Transactional Business Intelligence Components

If you want to know more about Oracle Transactional Business Intelligence components, here's what we have.

Oracle Transactional Business Intelligence

Here's the information about the parts of Oracle Transactional Business Intelligence (OTBI) that support analysis against your transactional data.

- Create and work with analyses, dashboards, and advanced analytical content, including dashboard prompts, conditions, actions, and key performance indicators.

Creating Analyses and Dashboards in Oracle Transactional Business Intelligence

- Administer analyses, dashboards, and other content.

Administering Oracle Transactional Business Intelligence

Oracle Analytics Publisher

Analytics Publisher is the part of OTBI you use for reports.

- Run and view reports.

Using Oracle Analytics Publisher in Oracle Transactional Business Intelligence

- Create and edit reports, data models, layouts, templates, subtemplates.

Designing Pixel-Perfect Reports in Oracle Transactional Business Intelligence

- Administer Analytics Publisher, set up data sources and delivery destinations, manage security, and move catalog objects.

Administering Oracle Analytics Publisher in Oracle Transactional Business Intelligence

Overview of Creation and Administration of Procurement Analytics and Reports

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

Types of Business Intelligence

The following table describes and explains the purpose of analyses, dashboards and reports.

Type	Description	Purpose
Analysis	An interactive display of data, for example in a table or graph.	To summarize or break down simple, real-time data, and help you make short-term decisions.
Dashboard	A collection of analyses and other content, presented on one or more pages, or tabs.	To get various pieces of information about a particular subject.

Type	Description	Purpose
Report	Output of data in a readable, predefined format.	To get high-volume data in an output optimized for printing, including documents to support internal operations, statutory requirements, and other business needs.

For a list of predefined analyses and reports, see [Procurement Reports and Analyses](#)

Modification of Analyses and Reports

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

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

Setup and Administration

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

- Configure Oracle Analytics Publisher, the tool used for generating and editing reports.
- Define flexfields to provide user-defined attributes that can be used in analyses.
- Archive analyses and reports and move them from one environment to another.

For a list of setup reports, see Oracle Fusion Cloud Applications View Setup Reports and Analyses on the Oracle Help Center. It provides details for all of the setup reports and analyses for cloud applications, each of which you can modify to meet your company's requirements.

Security Overview of Procurement Analytics and Reports

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

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

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

Related Topics

View Analytics, Reports, and Dashboards



There are different ways to view and work with your analytics and reports. You can view analyses, dashboards, and reports in the course of your work, on your usual pages and infolets. Or you can find them in the business intelligence catalog with the Reports and Analytics work area and the Reports and Analytics panel tab.

View Analytics in Infolets

Use your favorite infolet pages to find analytics.

1. Use the page controls and Previous and Next icons to explore infolet pages in the home page, where they may appear in infolets with summaries and aggregations or performance metrics. You may also find infolets in some work areas.
2. Click an infolet to open a detailed analysis. So for example, if an infolet has transactions summed to a total, click it to view details of the underlying transactions.
3. Click **Done**.

View Objects in Familiar Work Areas and Pages

Use analyses, dashboards, and reports available in your usual pages and work areas.

1. Explore your pages. Some may include analysis and report links or embedded objects, sometimes in tabs or panel tabs.
2. Some work areas have a Reports and Analytics panel tab, where you explore catalog folders for relevant analyses and reports for the work area. And if you have permission, you can map more objects to the work area if they're appropriate.
 - a. Open the panel tab.
 - b. Expand the Shared Reports and Analytics folder and explore the available content.
 - c. Click the link for any object and see its type to determine whether it's an analysis, a report, or a dashboard.
 - d. Click **View** to open the object.

View Objects in the Reports and Analytics Work Area

Use the Reports and Analytics work area to search or browse the catalog and view any analysis, dashboard, or report you have access to. It opens at the highest level of the catalog's folder hierarchy with all objects you have marked as favorites.

Here are some things you can do in the Reports and Analytics work area.

1. Click **Navigator > Tools > Reports and Analytics**.
2. Filter and search for objects:

- a. From the Filter list, select what you want to find.
- b. To view objects you have marked as favorites, select **Favorites** in the list. Or select **Recent Items** to view objects you recently worked with, or a recent search to run it again. Enter a name or part of a name and click the **Search** icon.
- c. In the search results, use the icons to identify what the objects are.
- d. Click the name of an object to open it, or click **More** and select an action.
3. In the breadcrumbs, browse the catalog folders for analytics and reports. Click any **Hierarchical Selector** icon to select a different node for the next level in the hierarchy.
4. Mark objects as favorites.
 - o Select **Favorites** in the Saved Searches to display your favorite objects.
 - o Click the **Add Favorites** icon for an object to mark it as a favorite.
 - o Click the **Remove from Favorites** icon to remove an object from your favorites.
5. Create and edit analyses and reports.
 - a. Click **Create** and select **Report** or **Analysis**.
 - b. Use wizards to create your analysis or report.
6. Click the **Browse Catalog** button (or click the **More** icon for a specific report, dashboard, or analysis) to use more features.

Note: If you don't see an analysis in the work area, browse the catalog for it. In the Catalog, select Show Hidden Items to display any hidden analyses.

View Analyses

An analysis queries against your company's data and answers business questions with visualizations, such as charts and tables. They may appear on your pages, or as parts of a dashboard.

1. From the catalog folders or search results, open an analysis to view.
2. Click **Refresh** to rerun the analysis and refresh its data.
3. Click **Print** and select either **Printable PDF** or **Printable HTML** to open a printable version.
4. Click **Export** to get analysis data in various formats, for example PDF, Excel, PowerPoint, comma-separated value (CSV), and XML.

Note: When you export data in a CSV format, dates are exported in raw format and converted to UTC time zone.

View Grouped Analyses in Dashboards

Some analyses are grouped in dashboards to give you meaningful related information. A dashboard contains pages of analyses, prompts that filter information, and other objects.

1. From the catalog folders or search results, open a dashboard to view.
2. Select values for any dashboard prompts to filter the dashboard.
3. Click **Apply** to refine the results of all of the analyses in the dashboard.

View Reports

Reports show data in a predefined format that's optimized for printing.

1. From the catalog folders or search results, open a report.
2. Click the **View Report** icon if you want a different format.
 - Choose **HTML** or **PDF** to display the report in a format for printing. Because it's optimized for printing, PDF often provides the best results.
 - You can also export the report as RTF for editing in a word processor, or as Excel or PowerPoint.
3. From the catalog folders or search results, you can also do these tasks:
 - Click **Edit** to edit the report properties, layout, and data model.
 - Click **Report History** to see details about past submissions of the report.
 - Click **Schedule** to schedule the report to be run.

2 Setup and Management

Set Up Currency

Currency and Exchange Rate Settings for Analytics

You can choose how currency is shown in your application. If you're running analytics on your application data, you can specify currency and exchange rate details in BI.

Currency can be set in different regional currency types, depending on where you do business and what currency types you want to see.

There are three ways you set up currency:

- **User Currency** - Set by the business user in Regional settings. This setting applies to the entire application interface for that user only. The available currency options are set by your application administrator.
- **Analytics Currency** - Set by the business user in BI in My Account settings in the Reports area. The setting applies to that user only and is only relevant for analyses.
- **Corporate Currency** - Set by the application administrator. This setting applies to all users in that company.

Note: The time zone preferences that you set in your fuse simplified user interface are inherited and used as the time zone setting for your existing and new analytics.

Set General User Currency

User currency settings determine the currency used as the default for what you see in your application. User currency applies to your entire interface for your signed-in session.

1. Navigate to **Tools, Set Preferences**.
2. Select **General Preferences > Regional**.
3. Select the preferred currency to be used. Available currencies include those set up for your company by your application administrator.

Set Analytics Currency

The analytics currency settings determine the currency type that's displayed in all your analytics. It also determines how and when your currency conversion rates are calculated.

1. Click **Navigator Tools Reports and Analytics**.
2. Click **Browse Catalog**.
3. Click **My Profile** and select **My Account**.
4. In the Preference tab, select your choice in **Currency**.

This shows the currency display options for users:

Currency Display Type	Description
Entered Currency	Currency used on a transaction.
<Application> Currency	Currency set up in each respective Cloud application as the common Corporate currency used company-wide.
User Preferred Currency using Simple Currency Management	Conversion to User Preferred Currency is performed at the time you run the report, and is calculated from the Corporate currency based on the last time the record was updated and saved or closed.
User Preferred Currency using Advanced Currency Management	Conversion to User Preferred Currency happens on the date you run the report, and uses the currency indicated on the record.

Set a Default Currency Conversion Option for All Users

By default your currency is converted to the corporate currency with a method called "User Preferred Currency Using Simple Currency Management".

The simple "User Preferred Currency Using Simple Currency Management" setting provides the best run-time performance because when you run a report, the application doesn't have to look up the rate for each transaction. The currency is converted to your corporate currency at that day's rate when you update and save a record. Otherwise, the application cycles through each record at run-time and converts the currency one record at a time to the exchange rate in effect at the time the report is run. For more information see, [How User Preferred Currency Exchange Works](#).

But you can also standardize the setting for all system users, by setting the default preference to another option, such as <myapplication> Currency or User Preferred Currency Using Advanced Currency Management.

To change the default currency setting for all users, administrators need to add a profile option and a corresponding value. Note that when administrators change the default currency setting for users in their organization, individual users can still override that setting and select their preferred currency in **My Account**.

The following table shows the profile option code parameters to override the default currency setting.

Profile Code	Profile Value Description
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	<myapplication>Currency - Defaults to Application Currency.
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	User Preferred Currency 1 - Defaults to User Preferred Currency Simple Currency Management.
BI_DEFAULT_CURRENCY_CONVERSION_METHOD	User Preferred Currency 2 - Defaults to User Preferred Currency Advanced Currency Management.

Set a Global Currency Conversion Profile

Set a global currency conversion method for all your users by creating a currency profile. Only administrators can create currency profiles.

1. In Setup and Maintenance, go to **Manage Administrator Profile Values**.
2. Enter the following values:
 - **Profile Option Code** : BI_DEFAULT_CURRENCY_CONVERSION_METHOD
 - **Profile Display Name** : BI Default Currency Conversion Method
 - Application
 - Module
 - **Start Date** : Provide previous day's date to proceed to next step to define values.
3. Click **Save** and **Close**.
4. In the Manage Profile Options dialog box, you see your new profile. Check the Enabled box for Site.
5. Click **Save** and **Close**.

Related Topics

- [How do I update existing setup data?](#)

Define Currency Profile Values

After you create your currency profile, the last step is to define the profile value. This step defines which currency management option is assigned to that profile.

1. In the Setup and Maintenance work area, use **Manage Administrator Profile Values**.
2. In Profile Option Code search for your profile: BI_DEFAULT_CURRENCY_CONVERSION_METHOD.
3. In Manage Administrator Profile Values, Click **Add** (+ icon).
4. Select **Site** as the Profile level.
5. Enter "User Preferred Currency 2" in Profile Value.
6. Click **Save and Close**.

How User Preferred Currency Exchange Works

The simple and advanced user-preferred currency choices determine how and when your currency exchange rates are calculated. For both simple and advanced currency management, when you save or close a report, the exchange rate is set at that time.

The option you choose impacts how quickly your reports are generated at run time. Each case includes trade-offs, as detailed in the examples.

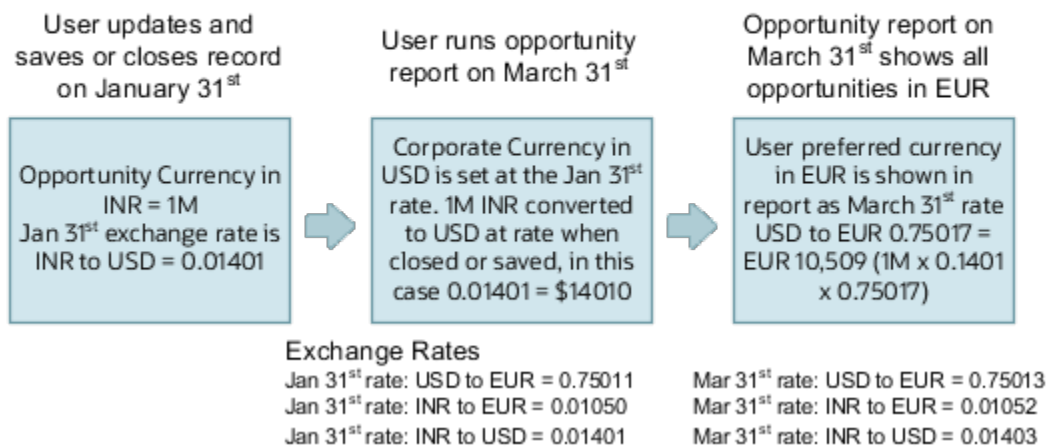
User Preferred Currency using Simple Currency Management

The advantage of this option is performance - the application doesn't have to look up the rate for each transaction because when you close or save a record, the application converts it to your corporate currency at that day's rate. When you run the opportunity report, the application multiplies that value by your preferred currency exchange rate for the date you run the report. This eliminates the need for the application to cycle through each record, and calculate the corresponding exchange rate to your preferred exchange rate at the time that record was closed or last saved. It simply takes the value on record for the original transaction exchange to corporate currency, and multiplies it by your preferred currency exchange rate at the time you run the report.

As an example of user preferred currency using simple currency management, a user updates and saves or closes an opportunity record with associated revenue of one million Indian Rupees on January 31st with an exchange rate of 0.01401 Rupees to one US Dollar. The user then runs an opportunity report in US Dollars on March 31st. In the report, the US Dollar Corporate Currency is set at the January 31st rate it was saved at, in this case reporting as \$14,010, or one million multiplied by 0.01401. Finally, an opportunity report on March 31st in Euros uses the March 31st conversion rate for US Dollars to Euros of 0.75017 to convert the recorded US Dollar amount into Euros, in this example one million multiplied by 0.01401, which is the January 31st Rupee to US Dollar exchange rate, multiplied by 0.75013, which is the March 31st rate for Euros. This requires less processing, because the January 31st Rupee to US Dollar exchange rate, while not exact on March 31st, is used as the basis for the calculation of the March 31st opportunity revenue conversion to Euros at the later exchange rate.

The following figure describes an example of user preferred currency using simple currency management.

Example of User Preferred Currency using Simple Currency Management:



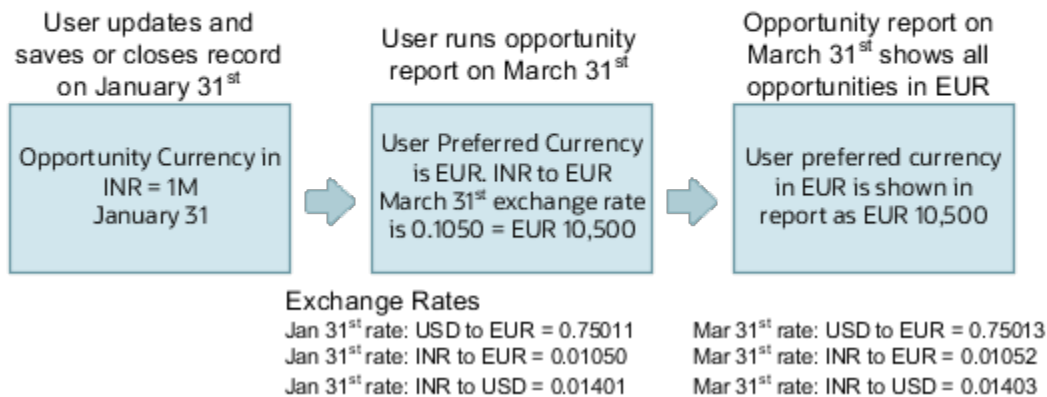
User Preferred Currency using Advanced Currency Management

This option provides a more precise exchange rate, since it goes through each record to determine the rate on the date the record was updated or closed. The downside of this option is performance. Your reports will take longer to run. The application has to cycle through each record and match currency exchange rates to the date the record was closed or updated and saved.

As an example of user preferred currency using advanced currency management, a user updates and saves or closes an opportunity record with associated revenue of one million Indian Rupees on January 31st, when an exchange rate of 0.01050 Rupees to one Euro applies. The user then runs an opportunity report on March 31st. In the report, the User Preferred Currency of Euros is applied, using the January 31st Rupee to Euro rate of 0.01050, requiring calculation during report processing to resolve the opportunity to 10,500 Euros. Note that running the opportunity report on March 31st doesn't change the calculation and the close date of January 31st is used.

The following figure describes an example of user preferred currency using advanced currency management.

**Example of User Preferred Currency
using Advanced Currency Management:**



Why do I see amounts of zero in analyses?

Currency exchange rates might not be set up correctly. For example, you set EUR as your preferred currency in general preferences, and corporate currency is USD. Amounts are displayed in EUR after conversion from USD at the current exchange rate.

Map to Work Areas

Set Up the Reports and Analytics Panel Tab

The Reports and Analytics panel tab appears in many work areas, and shows analytics and reports related to the work areas. You map and unmap the objects for a specific work area from the business intelligence (BI) catalog.

Your mapping changes for a work area apply to all users who have access to it.

Map and Remove Objects from Your Work Area

1. Expand the Reports and Analytics panel tab.
2. Click the **Edit Settings** icon.

You see all the analytics and reports that are currently mapped to your work area.

3. Click **Select and Add**.
4. Select the object in the catalog.
5. Click **OK**.
6. To remove any mapping, select the object and click **Remove**.
7. Click **Save**.

Map and Remove Objects from Any Work Area

1. In the Setup and Maintenance work area, go to the **Map Reports to Work Areas** task.
2. Select the application of the work area you want to map to.
3. Select the work area.
4. Click **Search** and see all the reports that are currently mapped to that work area.
5. Click **Select and Add**.
6. Select the object in the catalog.
7. Click **OK**.
8. To remove any mapping, select the object and click **Remove**.

Tip: Click **Synchronize** to remove all mappings to any objects that are no longer in the catalog. You synchronize all work areas, not just the one you're mapping.

9. Click **Save**.

Related Topics

- [Why can't I see analytics and reports when I edit settings for the Reports and Analytics panel tab?](#)
- [Why can't I see analytics and reports when mapping to work areas for the Reports and Analytics panel tab?](#)
- [Set Up Reports for Scheduling](#)
- [How do I update existing setup data?](#)

Why can't I see analytics and reports when mapping to work areas for the Reports and Analytics panel tab?

Either no analytics and reports are mapped to the work area you select on the Map Reports to Work Areas page, or you don't have access to the mapped objects.

Similarly, when you're selecting an object to map, you can only see objects you have access to. Your administrator can grant access to the objects or let someone with access map them.

- Assign you roles with access to the objects you want to map.
- Grant the Reports and Analytics Region Administration Duty to someone who already has access to the objects.

Why can't I see analytics and reports when I edit settings for the Reports and Analytics panel tab?

In the Edit Settings window, you might not see a currently mapped report because you don't have access to it.

Similarly, when you're selecting an object to map, you can only see objects you have access to. Your administrator can grant access to the objects or let someone with access map them.

- Assign you roles with access to the objects you want to map.

- Grant the Reports and Analytics Region Administration Duty to someone who already has access to the objects.

Set Up Reports as Scheduled Processes

Create Job Definitions to Run Reports as Scheduled Processes

Every job definition has a job type that reflects the executable for the job, such as Java or Oracle Analytics Publisher reports. You can only create job definitions that are based on Analytics Publisher reports.

When there's a job definition for an Analytics Publisher report, users can run the report as a scheduled process in the Scheduled Processes work area. Otherwise, they can open reports (which are set up to be run online) elsewhere, for example in the Reports and Analytics work area.

CAUTION: Make sure your user name doesn't contain any spaces. If you create a custom job definition using a user name that contains spaces, other users might get errors when they submit this custom job definition.

Create Job Definitions

Here's how you create a job definition for an Analytics Publisher report:

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.
Note: If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.
2. On the Manage Enterprise Scheduler Job Definitions and Job Sets page, click the Manage Job Definitions tab.
3. Click the **Create** icon.
4. Fill in the Job Definition section.

Field or Check Box	What You Do
Display Name	Enter the name that users see and select to submit the scheduled process.
Name	Enter a name with only alphanumeric characters, for example, AtkEssPrograms1 . It can't have spaces or any special characters.
Job Application Name	Select the application to associate the job definition with. What you select depends on the task you're using. ○ Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications: Select CrmEss. ○ Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications: Select FscmEss. ○ Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications task: Select EarHcmEss.

Field or Check Box	What You Do
Enable submission from Enterprise Manager	Make sure you don't select this check box.
Job Type	Select BIPJobType . Don't select any other type.
Default Output Format	Select the output format users get by default when they submit the scheduled process.
Report ID	Enter the path to the report in the BI catalog, starting with the folder within Shared Folders, for example: Custom/<Family Name>/<Product Name>/<Report File Name>.xdo. Make sure to include the .xdo file extension for the report definition.
Enable submission from Scheduled Processes	Leave the check box selected.

5. In the Parameters subtab, you can define parameters that are available to users when they submit the scheduled process based on your job definition.
6. In the User Properties subtab, don't create or edit a user property unless you have the accurate information that's required to create or edit one. The **EXT_PortletContainerWebModule** user property is automatically created.
7. Click **Save and Close**.

When you create a job definition, a privilege with the same name as the job definition is automatically created with a Run prefix. For example, for a job definition named MyProcess1, with display name My Process, the privilege code is RUN_MYPROCESS1, with Run My Process as the name. Make sure to use the Security Console to assign this privilege to roles so that users who need to run the process can do so.

Related Topics

- [Define Parameters for Job Definitions](#)
- [How do I update existing setup data?](#)
- [Configure Offerings](#)
- [Manage List of Values Sources](#)
- [Edit Job Definitions](#)

Define Parameters for Job Definitions

A parameter controls which records are included or how they are affected when a job runs. Job definitions can have one or more parameters or none at all.

You define parameters while creating or editing job definitions using the Manage Enterprise Scheduler Job Definitions and Job Sets page. In the Setup and Maintenance work area, use the following:

- Functional Area: Application Extensions or a product-specific functional area

- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

When users run the scheduled process for job definitions of type BIPJobType, the values they enter for the parameters determine the data to be included in the report. Also, the values are passed to the data model that the report is using.

The parameters that you define must be in the same order as parameters in the data model for the report. For example, the data model has parameters in this order:

- P_START_DATE
- P_END_DATE
- P_CURRENCY

You create parameters as follows:

- Start Date
- End Date
- Currency

Defining Parameters: Job Definitions

To define parameters while creating or editing job definitions:

1. On the Manage Job Definitions page, open the Parameters sub tab.
2. Click **Create**.
3. Enter the parameter prompt that users see when they submit the scheduled process.
4. Select a data type and configure how the parameter and the data entered are displayed, as described in this table.

Data Type	Fields
Boolean	Select this if you want the parameter to be a check box. Select True or False to determine if the check box is selected or not.
Date or time	Select Date and time or Date only option. Select a value from the Default Date Format. Note: Make sure the format you select here is the same as the format used for the job. If the job definition type is BIPJobType, select yyyy-MM-dd, and make sure the data model for the corresponding Oracle Analytics Publisher report is using the same date format.
Number	Select a Number Format. Select Left or Right for data alignment.
String	Select a Page Element. Select Text box if you want the user to provide a text.

Data Type	Fields
	Select Choice list if you want a list with limited options (maximum 10). If there are more than 500 values, users will get an error when they try to set the parameter as part of submitting the scheduled process. Select List of values if you want a list with unlimited options with a search facility.

5. Select the **Read Only** check box if you don't want to enable users to set this parameter. When a parameter is set as read only, the user is required to provide a default value to be passed to the job definition.
6. If you select list of values or choice list page element, select a **List of Values Source** and an **Attribute**. Use the list of values sources from the Manage List of Values Sources tab. Don't define lists of values in the data model that the report is using.
7. From the list of available attributes, select the attributes you want to appear in the list and move them to the selected attributes section. These attributes determine the values that the user can see.
8. Define a **Default Value** for the parameter.
9. In the **Tooltip Text** field, provide additional information for the user to follow.
10. Select the **Required** check box if users must set this parameter to submit the scheduled process.
11. Select the **Do not Display** check box if users should not see this parameter while submitting the process.
12. Click **Save and Create Another** or **Save and Close**.

Dependent Parameters

The attributes of some parameters depend on the attributes or values of certain other parameters. The attributes of a parameter would change if the value of its dependent parameter changes.

For example, you have three parameters, namely Country, State and, City. In this case, the value of the Country parameter would determine the values available in the State parameter. The values in the State parameter would determine the values available in the City parameter.

Related Topics

- [Create Job Definitions to Run Reports as Scheduled Processes](#)
- [Define Dependent Parameters in Job Definitions](#)

Set Up Reports for Scheduling

You can set up reports as scheduled processes so users can submit them from the Scheduled Processes and other work areas.

If you want users to also submit these scheduled processes from the Reports and Analytics work area and panel tab, then you need to configure properties for the corresponding reports.

Enable a Report for Scheduling

1. In the Reports and Analytics work area or panel tab, edit the report in the business intelligence catalog.
2. Click **Properties**.
3. In the General tab in the Properties dialog box, enter the field values as shown in this table and then click **OK**.

Field	Value
Enterprise Scheduler Job Package Name	Enter the path for the job definition, for example: <code>/oracle/apps/ess/<product family>/<product>/<business area>/Jobs</code>
Enterprise Scheduler Job Definition Name	Enter the job definition name (not display name), for example: <code>ABCDEFGF</code>

Related Topics

- [Set Up the Reports and Analytics Panel Tab](#)
- [How You Access and Modify Report Components](#)
- [Create Job Definitions to Run Reports as Scheduled Processes](#)

Configure Deep Links

Register Business Intelligence to Support Deep Linking

Deep linking lets you to navigate from an analysis on the interface pages to specific attributes and objects in your work areas so that you can work with them directly.

What does that mean? It means that if you're looking at an analysis on leads, for example, you can click a record on the analytic and go edit the lead record on the edit object page. To support deep links, use the Setup and Maintenance work area to register the Business Intelligence Server as a third-party application.

Register Business Intelligence Server as a Third-Party Application

To register the BI Server:

1. Use the **Manage Third Party Applications** page.
2. Click **Create**.
3. Enter `AnalyticsApp` as the application name.
4. Enter the full URL for the BI Server (for example: `http://host:port/analytics/saw.dll`).
5. Enter `Analytics Server` as the Partner Name.
6. Click **Save and Close**.

Related Topics

- [Manage Integration of Additional Applications](#)

Create Deep Links

Create deep links in your analytics that let you navigate from an analysis to specific attributes and objects in your transactional pages to work with them directly.

1. In the Reports and Analytics work area, click **Browse Catalog**.
2. Create or edit an analysis. Use a subject area that includes the attribute you want to link to in the transactional pages, and ensure that you include the object ID.
3. On the Criteria tab, click the **Options** icon for the attribute column on which you need a deep link and select **Column Properties**.
4. Open the Interaction tab in the Column Properties dialog box.
5. In the Primary Interaction list in the Value section, select **Action Links** to display the Action Links table.
6. Select the **Do not display in a pop-up if only one action link is available at runtime** option.
7. Click **Add Action Link**.
8. In the New Action Link dialog box, enter the link text for the navigation.
9. Click the **Create New Action** icon and select **Navigate to a Web Page**.
10. In the Create New Action dialog box, enter the URL to navigate to, which references parameters you define in the prompt. For shared analyses: `//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2}&action=@{3}&returnApp=AnalyticsApp&returnAppParams=PortalGo%26path=</shared/Custom/<folder>/@{6}`

Note: If you don't click the Return icon, remove parameters 5 through 7. In this case, the URL would be: `//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2};searchInd=@{3}&action=@{4}`

For personal analyses stored in My Folders: `//<hostname>/fscmUI/faces/deeplink?objType=@{1}&objKey=<object ID>=@{2}&action=@{3}&returnApp=AnalyticsApp&returnAppParams=PortalGo%26path=/users/@{5}/@{6}`

11. Click **Define Parameters** to add corresponding parameters for the URL.
12. In the Define Parameters section, click **Add Parameter** to add the following mandatory parameters:

Name	Prompt	Type of Value	Value	Fixed	Hidden	Notes
1	Object Type	Value	<Object Type>	Selected	Selected	Used for shared and personal analyses.
2	<Prompt Name>	Column Value	Column Name in " <code><table.name></code> " format	Selected	Selected	Used for shared and personal analyses.
3	Action	Value	edit	Selected	Selected	Used for shared and personal analyses.
4	returnApp	Value	AnalyticsApp	Selected	Selected	Used for shared and personal analyses.

Name	Prompt	Type of Value	Value	Fixed	Hidden	Notes
5	Logged in User	Session Variable	USER	Selected	Selected	Session variable parameter used for personal analysis permissions.
6	Report Name	Value	Analysis Name	Selected	Selected	Used for shared and personal analyses. The name of the analysis to return to after working in the transactional page.

13. Click **Options** to set how the page opens.
14. In the Action Options dialog box, select **Open in New Window** to open the page in a new window.
15. Save your work.
16. If you have provided the Return Application name, a Return icon is available in the transactional page to return to the analysis.

Related Topics

- [Register Business Intelligence to Support Deep Linking](#)
- [Manage Analytics with Advanced Features](#)

Deep Links for Procurement

You can use deep links to open pages without navigating through the menu structure.

When you add deep links to a business intelligence report or a company website, users can simply click those links to go directly to the application pages they need to use, without any additional clicks or navigation. You can find all of the available deep links in the Deep Links work area. Some deep links, such as those assigned the NONE action, are ready to use as is. Other deep links, such as those assigned the VIEW action, require you to edit the link details before you can use them.

This table lists Procurement deep links that are available in the Deep Links work area.

Product	Deep Link (Object Type, Action)	Short Description of Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Oracle Purchasing	View Order (PURCHASE_ORDER,	Opens a specific purchase order for viewing on the View Order page.	Y	PO_HEADER_ID: Unique identifier of a purchasing document.	PO_HEADER_ID column in the PO_HEADERS_ALL table.

Product	Deep Link (Object Type, Action)	Short Description of Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
	VIEW) View Order PURCHASE_ORDER, NONE				
Oracle Purchasing	View Order (PURCHASE_ORDER_ LOBUSER,NONE)	Opens a specific purchase order for viewing on the View Order page.	Y	PO_HEADER_ID: Unique identifier of a purchasing document.	PO_HEADER_ID column in the PO_HEADERS_ALL table.
Oracle Purchasing	View Order (PURCHASE_ORDER_ APUSER,NONE)	Opens a specific purchase order for viewing on the View Order page in the Invoice work area.	Y	PO_HEADER_ID: Unique identifier of a purchasing document.	PO_HEADER_ID column in the PO_HEADERS_ALL table.
Oracle Purchasing	View Agreement (PURCHASE_AGREE MENT,VIEW) View Agreement (PURCHASE_AGREE MENT,NONE)	Opens a specific purchase agreement for viewing on the View Agreement page.	Y	PO_HEADER_ID: Unique identifier of a purchasing document.	PO_HEADER_ID column in the PO_HEADERS_ALL table.
Oracle Purchasing	View Order (PURCHASE_ORDER_ REQUESTER,NONE)	Opens a specific purchase order for viewing on the View Order page.	Y	PO_HEADER_ID: Unique identifier of a purchasing document.	PO_HEADER_ID column in the PO_HEADERS_ALL table.
Oracle Purchasing	View Change Order (PURCHASE_ORDER_ CHANGE,VIEW) View Change Order (PURCHASE_ORDER_ CHANGE,NONE)	Opens a specific purchase order change order for viewing on the View Order page.	Y	PO_HEADER_ID: Unique identifier of a purchasing document.	PO_HEADER_ID column in the PO_HEADERS_ALL table.
Oracle Purchasing	View Change Orde as Requester (PURCHASE_ORDER_ CHANGE_REQ,VIEW) View Change Order as Requester	Opens a specific purchase order change order for viewing on the View Order page in the Purchase Requisitions work area.	Y	PO_HEADER_ID: Unique identifier of a purchasing document.	PO_HEADER_ID column in the PO_HEADERS_ALL table.

Product	Deep Link (Object Type, Action)	Short Description of Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
	(PURCHASE_ORDER_CHANGE_REQ,NONE)				
Oracle Purchasing	View Agreement Change Order (PURCHASE_AGREEMENT_CHANGE,VIEW) View Agreement Change Order (PURCHASE_AGREEMENT_CHANGE,NONE)	Opens a specific purchase agreement change order for viewing on the View Order page.	Y	PO_HEADER_ID: Unique identifier of a purchasing document.	PO_HEADER_ID column in the PO_HEADERS_ALL table.
Oracle Purchasing	View Compliance Checklist (CHECKLIST,VIEW)	Opens a specific compliance checklist for viewing on the View Checklist page.	Y	ChecklistInitiativeld: Unique identifier of a compliance checklist.	INITIATIVE_ID column in the POQ_INITIATIVES table.
Oracle Sourcing	View Negotiation (NEGOTIATION,VIEW)	Opens a specific negotiation on the View Negotiation page.	Y	AUCTION_HEADER_ID: Unique identifier of a negotiation.	AUCTION_HEADER_ID column in the PON_AUCTION_HEADERS_ALL table.
Oracle Sourcing	Manage Negotiations (NEGOTIATION,NONE)	Opens the Manage Negotiations page in the Procurement work area.	N	N/A	N/A
Oracle Sourcing	View Negotiation (NEGOTIATION_SUPPLIERUSER,VIEW)	Opens a specific negotiation on the View Negotiation page in the Supplier portal.	Y	AUCTION_HEADER_ID: Unique identifier of a negotiation.	AUCTION_HEADER_ID column in the PON_AUCTION_HEADERS_ALL table.
Oracle Sourcing	Active Negotiations (NEGOTIATION_SUPPLIERUSER,NONE)	Opens the Active Negotiations page in the Supplier portal.	N	N/A	N/A
Oracle Supplier Model	View Supplier (SUPPLIER,VIEW) View Supplier (SUPPLIER,NONE)	Opens a specific supplier on the View Supplier page.	Y	SupplierNumber: Number that uniquely identifies the supplier. SupplierName: Name of the supplier.	SupplierNumber SEGMENT1 column in the POZ_SUPPLIERS table. SupplierName

Product	Deep Link (Object Type, Action)	Short Description of Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
					PARTY_NAME column in the HZ_PARTIES table.
Oracle Supplier Model	View Supplier (SUPPLIER_POUSER, VIEW) View Supplier (SUPPLIER_POUSER, NONE)	Opens a specific supplier on the View Supplier page in the Purchasing work area.	Y	SupplierNumber: Number that uniquely identifies the supplier. SupplierName: Name of the supplier.	SupplierNumber SEGMENT1 column in the POZ_SUPPLIERS table. SupplierName PARTY_NAME column in the HZ_PARTIES table.
Oracle Supplier Qualification	View Qualification (QUALIFICATION, VIEW)	Opens a specific qualification on the View Qualification page.	Y	QUALIFICATIONS_ID: Unique identifier of the qualification.	QUALIFICATIONS_ID column in the POQ_QUALIFICATIONS table.
Oracle Supplier Qualification	Manage Qualifications (QUALIFICATION, NONE)	Opens the Manage Qualifications page in the Supplier Qualification work area.	N	N/A	N/A
Oracle Supplier Qualification	View Assessment (ASSESSMENT,VIEW)	Opens a specific assessment on the View Assessment page.	Y	ASSESSMENT_ID: Unique identifier of the assessment.	ASSESSMENT_ID column in the POQ_ASSESSMENTS table.
Oracle Supplier Qualification	Manage Assessments (ASSESSMENT,NONE)	Opens the Manage Assessment page in the Supplier Qualification work area.	N	N/A	N/A
Oracle Supplier Qualification	View Initiative (INITIATIVE,VIEW)	Opens a specific initiative on the View Initiative page.	Y	InitiativeId: Unique identifier of the initiative.	INITIATIVE_ID column in the POQ_INITIATIVES table.
Oracle Supplier Qualification	Manage Initiatives (INITIATIVE,NONE)	Opens the Manage Initiative page in the Supplier Qualification work area.	N	N/A	N/A
Oracle Self Service Procurement	View Requisition Lines (PURCHASE_REQUISITION_PRCAGENT, NONE)	Opens the View Requisition Lines page in the Purchasing work area so that the user can search for a requisition line.	N	N/A	N/A

Product	Deep Link (Object Type, Action)	Short Description of Purpose	ObjKey Needed? (Y/N)	Name and Description of ObjKey Parameter	ObjKey Parameter Values
Oracle Self Service Procurement	View Requisition Details (PURCHASE_REQUISITION_PRCAGENT, VIEW)	Opens a specific requisition for viewing on the View Requisition Details page.	Y	REQUISITION_HEADER_ID: Unique identifier of a requisition.	REQUISITION_HEADER_ID column in the POR_REQUISITION_HEADERS_ALL table.
Oracle Self Service Procurement	View Requisition Details (PURCHASE_REQUISITION_LOBUSER, VIEW)	Opens a specific requisition for viewing on the View Requisition Details page.	Y	REQUISITION_HEADER_ID: Unique identifier of a requisition.	REQUISITION_HEADER_ID column in the POR_REQUISITION_HEADERS_ALL table.
Oracle Self Service Procurement	Manage Requisitions (PURCHASE_REQUISITION_LOBUSER, NONE)	Opens the Manage Requisition page in the Purchase Requisitions work area so that the user can search for a requisition.	N	N/A	N/A

Note: In Purchasing and Supplier Model, deep links that have NONE or VIEW action, open a specific page and need an ObjKey.

This table lists the target audience and security requirements for different Procurement deep links.

Deep Link (Object Type, Action)	Target Audience	Security Requirements	Examples
View Order (PURCHASE_ORDER, VIEW) View Order (PURCHASE_ORDER, NONE)	Buyer	Function Security: - View Purchase Order - View Purchase Order Work Area Data Security: - Procurement Agent Access	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_ORDER&objKey=poHeaderId=111111&act: https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_ORDER&objKey=poHeaderId=111111
View Order (PURCHASE_ORDER_LOBUSER, NONE)	Purchase Analyst	Function Security: - View Purchase Order - View Purchase Order Work Area Data Security:	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_ORDER_LOBUSER&objKey=poHeaderId=111111

Deep Link (Object Type, Action)	Target Audience	Security Requirements	Examples
		- Requisitioning business units for which they're authorized - For the financial business unit associated with their primary assignment	
View Order (PURCHASE_ORDER_APUSER, NONE)	AP Specialist	Function Security: - View Purchase Order - View Invoice Work Area Data Security: - Bill-to business units for which they're authorized	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_ORDER_APUSER&objKey=poHeaderId=111111
View Agreement (PURCHASE_AGREEMENT,VIEW) View Agreement (PURCHASE_AGREEMENT,NONE)	Buyer	Function Security: - View Purchase Agreement - View Purchase Agreement Work Area Data Security: - Procurement Agent Access	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_AGREEMENT&objKey=poHeaderId=111111 https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_AGREEMENT&objKey=poHeaderId=111111
View Order (PURCHASE_ORDER_REQUESTER, NONE)	Requester	Function Security: - Manage Requisitions - View PO as Requester OR View PO - View Requisition All Data Security: - Requisitioning business units for which they're authorized - If the user has the View Requisition All privilege, then they have access to all POs for the authorized BUs else they need to be a requester or preparer	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_ORDER_REQUESTER&objKey=poHeaderId=111111
View Change Order (PURCHASE_ORDER_CHANGE, VIEW) View Change Order (PURCHASE_ORDER_CHANGE, NONE)	Buyer	Function Security: - View Purchase Order - View Purchase Order Work Area Data Security: - Procurement Agent Access	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_ORDER_CHANGE&objKey=poHeaderId=111111

Deep Link (Object Type, Action)	Target Audience	Security Requirements	Examples
View Change Order as Requester (PURCHASE_ORDER_CHANGE_REQ,VIEW) View Change Order as Requester (PURCHASE_ORDER_CHANGE_REQ,NONE)	Requester	Function Security: - Manage Requisitions - View PO as Requester OR View PO Data Security: - Requisitioning business units for which they're authorized - If the user has the View Requisition All privilege, then they have access to all POs for the authorized BUs else they need to be a requester or preparer - User must be originator of the change order	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_ORDER_CHANGE_REQ&objKey=poHeaderId=111111
View Agreement Change Order (PURCHASE_AGREEMENT_CHANGE,VIEW) View Agreement Change Order (PURCHASE_AGREEMENT_CHANGE,NONE)	Buyer	Function Security: - View Purchase Agreement - View Purchase Agreement Work Area Data Security: - Procurement Agent Access	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_AGREEMENT_CHANGE&objKey=poHeaderId=111111
View Compliance Checklist (CHECKLIST,VIEW)	Buyer	Function Security: - View Compliance Checklist Data Security: - Checklist Owner, or - An active agent for the procurement business unit with access to Manage Compliance Checklists and is allowed to have VIEW or FULL access to other agents documents	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=CHECKLIST&objKey=Checklist:
View Negotiation (NEGOTIATION,VIEW)	Category Manager/ Sourcing Project Collaborator	Function Security: - View Supplier Negotiation Work Area - View Supplier Negotiation Data Security: - Negotiation owner (Category manager), or - A member of the Collaboration team, or	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=NEGOTIATION&action=VIEW&objKey=Checklist:

Deep Link (Object Type, Action)	Target Audience	Security Requirements	Examples
		An active agent for the procurement business unit with access to manage negotiations and is allowed to have VIEW or FULL access to other agents documents	
Manage Negotiations (NEGOTIATION,NONE)	Category Manager/ Sourcing Project Collaborator	Function Security: - View Supplier Negotiation Work Area Data Security: - Negotiation owner (Category manager), or - A member of the Collaboration team, or - An active agent for the procurement business unit with access to manage negotiations and is allowed to have VIEW or FULL access to other agents documents	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=NEGOTIATION&action=NONE
View Negotiation (NEGOTIATION_SUPPLIERUSER,VIEW)	Supplier Bidder	Function Security: - View Supplier Negotiation - Access Suppliers Work Area Overview Data Security: - Supplier Data Access - Negotiation Response Rule to Restrict to Invited Suppliers	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=NEGOTIATION_SUPPLIERUSER&action=VIEW&objKey=Aut
Active Negotiations (NEGOTIATION_SUPPLIERUSER,NONE)	Supplier Bidder	Function Security: - View Supplier Negotiation - Access Suppliers Work Area Overview	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=NEGOTIATION_SUPPLIERUSER&action=NONE
View Supplier (SUPPLIER,VIEW) View Supplier (SUPPLIER,NONE)	Supplier Administrator/ Manager	Function Security: - Suppliers Work Area - View or Maintain Supplier	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=SUPPLIER&objKey=supplierNum https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=SUPPLIER&objKey=supplierName Corporation
View Supplier (SUPPLIER_POUSER,VIEW)	Buyer	Function Security: View or Maintain Supplier	https://pod.oraclecloud.com/fndSetup/faces/deeplink?

Deep Link (Object Type, Action)	Target Audience	Security Requirements	Examples
View Supplier (SUPPLIER_POUSER,NONE)		View Purchase Order Work Area	objType=SUPPLIER_POUSER&objKey=supplierNumber=11111 https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=SUPPLIER_POUSER&objKey=supplierName=Vision_Corporation
View Qualification (QUALIFICATION,VIEW)	Supplier Qualification Manager	Function Security: - View Supplier Qualification - View Supplier Qualification Work Area Data Security: - Qualification owner, or - A member of the Evaluation team or, - An active agent for the procurement business unit with access to manage supplier qualifications and is allowed to have VIEW or FULL access to other agents documents	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=QUALIFICATION&objKey=quali
Manage Qualifications (QUALIFICATION,NONE)	Supplier Qualification Manager	Function Security: - Search Supplier Qualification - View Supplier Qualification Work Area Data Security: - An active agent for the procurement business unit	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=QUALIFICATION&action=NONE
View Assessment (ASSESSMENT,VIEW)	Supplier Qualification Manager	Function Security: - View Supplier Assessment - View Supplier Qualification Work Area Data Security: - Assessment owner, or - A member of the Evaluation team or, - An active agent for the procurement business unit with access to Manage Supplier Qualifications and is allowed to have VIEW or	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=ASSESSMENT&objKey=assessmen

Deep Link (Object Type, Action)	Target Audience	Security Requirements	Examples
		FULL access to other agents documents	
Manage Assessments (ASSESSMENT,NONE)	Supplier Qualification Manager	Function Security: - Search Supplier Assessment - View Supplier Qualification Work Area Data Security: - An active agent for the procurement business unit	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=ASSESSMENT&action=NONE
View Initiative (INITIATIVE,VIEW)	Supplier Qualification Manager	Function Security: - View Supplier Qualification Initiative - View Supplier Qualification Work Area Data Security: - Initiative owner, or - A member of the Evaluation team or, - An active agent for the procurement business unit with access to Manage Supplier Qualifications and is allowed to have VIEW or FULL access to other agents' documents.	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=INITIATIVE&objKey=initiativ
Manage Initiatives (INITIATIVE,NONE)	Supplier Qualification Manager	Function Security: - Search Supplier Qualification Initiative - View Supplier Qualification Work Area Data Security: - An active agent for the procurement business unit.	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=INITIATIVE&action=NONE
View Requisition Lines (PURCHASE_REQUISITION_PRCAGENT,NONE)	Procurement Agent Running OTBI Reports	Function Security: - View Requisitions Data Security: - Procurement Agent Access	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_REQUISITION_PRCAGENT&action=NONE
View Requisition Details (PURCHASE_REQUISITION_	Procurement Agent Running OTBI Reports	Function Security: Purchase Order Work Area	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=NEGOTIATION&objKey=requisiti

Deep Link (Object Type, Action)	Target Audience	Security Requirements	Examples
PRCAGENT,VIEW)		- View Requisition (As Buyer) Data Security: - Procurement Agent Access	
View Requisition Details (PURCHASE_REQUISITION_ LOBUSER,VIEW)	Line of Business User Running OTBI Reports	Function Security: - Manage Requisitions Data Security: - Purchase Analysis, Manage User Data Access, and Primary BU	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_REQUISITION_LOBUSER&objKey=requisitionHeaderId
Manage Requisitions (PURCHASE_REQUISITION_ LOBUSER,NONE)	Line of Business User Running OTBI Reports	Function Security: - Manage Requisitions Data Security: - Manage User Data Access	https://pod.oraclecloud.com/fndSetup/faces/deeplink?objType=PURCHASE_REQUISITION_LOBUSER&action=NONE

To know how to construct deep links to purchasing transactions from analyses and reports, refer to the Navigating to Purchasing Transactions from Reports white paper that's available on My Oracle Support (Document ID 2444555.1).

To know how to construct deep links to supplier profiles from analyses and reports, refer to the Navigating to Supplier Profile from Reports white paper that's available on My Oracle Support (Document ID 2556026.1).

FAQs for Deep Links

Why did a deep link open to a blank page?

You may not have access to the linked object, or the URL entered for the action is incorrect, for example lacking the environment or the Object ID name.

- Check the URL you entered for the action. It may be missing the environment name or the Object ID name.
- Check the URL parameters, the spelling of the action, and that you're using the correct key in the object's analysis.

Do I have to display the ID for my object?

No, you can add it, format the column as a number with zero decimals, and then hide the column.

Can I display actions for some users and not others?

Yes, you define conditions for the action to display.

Manage Permissions

Manage Catalog Permission

You may want to remove access to predefined catalog folders so that those associated with offerings you don't use aren't displayed. You can hide the entire predefined catalog or selectively display root catalog folders for offerings.

To control which offerings are available, create a custom role based on the Custom BI Web cat Reporting Duty role and its associated roles for each. Using custom roles, you can manage folder access in a number of ways, depending on requirements and previous modifications you have made.

- Add duty roles for parent folders to the custom role so that all users see a subset of the predefined catalog. Add roles only for the offerings you want to retain access for.
- Don't add any catalog reporting duty roles for any offerings to the custom role to hide the entire predefined catalog and display only **/Shared/Custom** folders. For example, you can remove BI catalog access for external users such as partners who have no access to reporting.
- Delete all catalog reporting duty roles from the custom role. Also, add catalog reporting duty roles to a new or existing job role so that job roles with BI access get default access to the predefined catalog. For example, by default, Financial job roles have access to Financial reporting content but Human Capital Management job roles don't have access to the predefined HCM BI catalog. You can grant the Human Capital Management Folder Reporting Duty role to new job roles to allow access to predefined HCM reports.

Hide Predefined Catalog Folders

All authenticated users have the Custom BI Web cat Reporting Duty role, which inherits all of the folder reporting roles that determine access and visibility of root level catalog folders. Administrators with IT Security Manager privileges can hide predefined folders by creating custom roles based on this role and their associated roles from the duty role.

1. Open the Security Console.
2. Search for Custom BI Web cat Reporting Duty and review its duty roles to determine which to retain in your custom role.
3. Create a custom role.
4. Click **Actions > Add Role**.
5. Click **Next** twice to navigate to the Role Hierarchy step.
6. To hide all folders, leave the hierarchy empty. Add any roles for offerings you want to retain access for.
7. Run the **Import User and Role Application Security Data** process to synchronize security changes.
8. Click **Browse Catalog** in the Reports and Analytics work area and click **Administration**. In the Maintenance and Troubleshooting section, select **Reload Files and Metadata** to refresh the BI cache.

BI Reporting Roles

This table shows the mapping between shared root catalog folders, folder reporting roles, and job roles.

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
/Shared/Common Content	BI_COMMON_CONTENT_REPORTING_DUTY	Common Content Folder Reporting Duty	None

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
/Shared/Customer Data Management	BI_CDM_REPORTING_DUTY	Customer Data Management Folder Reporting Duty	None
/Shared/Enterprise Contracts	BI_OKC_REPORTING_DUTY	Enterprise Contracts Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB, ORA_OKC_SUPPLIER_CONTRACT_TEAM_MEMBER_ABSTRACT
/Shared/Extension	BI_EXT_REPORTING_DUTY	Extension Folder Reporting Duty	None
/Shared/Financials	BI_FIN_REPORTING_DUTY	Financials Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_INVOICE_SUPERVISOR_JOB, ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_PAYMENT_SUPERVISOR_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_SOD_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_SOD_JOB, ORA_AR_BILLING_MANAGER_JOB, ORA_AR_BILLING_SPECIALIST_JOB, ORA_CE_CASH_MANAGER_JOB, ORA_EXM_EXPENSE_MANAGER_JOB, ORA_FA_ASSET_ACCOUNTANT_JOB, ORA_FA_ASSET_ACCOUNTING_MANAGER_JOB, ORA_FUN_INTERCOMPANY_ACCOUNTANT_JOB, ORA_GL_FINANCIAL_ANALYST_JOB, ORA_VRM_REVENUE_ANALYST_JOB, ORA_VRM_REVENUE_MANAGER_JOB, ORA_XCC_BUDGET_MANAGER_JOB
/Shared/Higher Education	BI_HED_REPORTING_DUTY	Higher Education Folder Reporting Duty	ORA_HEQ_ADMISSIONS_COORDINATOR_JOB, ORA_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			HEQ_ADMISSIONS_MANAGER_JOB, ORA_HER_ACADEMIC_COORDINATOR_JOB, ORA_HER_REGISTRAR_JOB, ORA_HES_BURSAR_JOB, ORA_HEY_STUDENT_SERVICES_MANAGER_JOB, ORA_HEY_STUDENT_SUPPORT_ADVISOR_JOB
/Shared/Human Capital Management	BI_HCM_REPORTING_DUTY	Human Capital Management Folder Reporting Duty	By default, predefined HCM job roles have no access to the predefined content.
/Shared/Incentive Compensation	BI_IC_REPORTING_DUTY	Incentive Compensation Folder Reporting Duty	ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB, ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_MANAGER_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB
/Shared/Loyalty	BI_LOY_REPORTING_DUTY	Loyalty Folder Reporting Duty	ORA_LOY_LOYALTY_MARKETING_MANAGER_JOB, ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB
/Shared/Manufacturing	BI_MFG_REPORTING_DUTY	Manufacturing Folder Reporting Duty	ORA_CSE_ASSET_ADMINISTRATOR_JOB
/Shared/Marketing	BI_MKT_REPORTING_DUTY	Marketing Folder Reporting Duty	ORA_MKL_SALES_LEAD_QUALIFIER_JOB, ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_ANALYST_JOB, ORA_MKT_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB, ORA_MKT_MARKETING_VP_JOB
/Shared/Partner	BI_ZPM_REPORTING_DUTY	Partner Folder Reporting Duty	ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
/Shared/Procurement	BI_PRC_REPORTING_DUTY	Procurement Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_PO_BUYER_JOB, ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB, ORA_PO_PROCUREMENT_INTEGRATION_SPECIALIST_JOB, ORA_PO_PURCHASE_ANALYSIS_ABSTRACT, ORA_POQ_SUPPLIER_QUALIFICATION_DISCRETIONARY, ORA_POR_PROCUREMENT_REQUESTER_ABSTRACT, ORA_POZ_SUPPLIER_ADMINISTRATOR_ABSTRACT, ORA_POZ_SUPPLIER_MANAGER_ABSTRACT
/Shared/Projects	BI_PRJ_REPORTING_DUTY	Projects Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_PJF_GRANTS_ACCOUNTANT_JOB, ORA_PJF_GRANTS_ADMINISTRATOR_JOB, ORA_PJF_GRANTS_DEPARTMENT_ADMINISTRATOR_JOB, ORA_PJF_PROJECT_ACCOUNTANT_JOB, ORA_PJF_PROJECT_ADMINISTRATOR_JOB, ORA_PJF_PROJECT_BILLING_SPECIALIST_JOB, ORA_PJF_PROJECT_EXECUTION_ABSTRACT, ORA_PJF_PROJECT_EXECUTIVE_JOB, ORA_PJF_PROJECT_INTEGRATION_SPECIALIST_JOB, ORA_PJF_PROJECT_MANAGEMENT_DUTY_ABSTRACT, ORA_PJF_PROJECT_MANAGER_JOB, ORA_PJF_PROJECT_TEAM_MEMBER_ABSTRACT, ORA_PJF_PROJECTS_APPLICATION_ADMINISTRATOR_JOB, ORA_PJF_RESOURCE_MANAGER_JOB, ORA_PJF_TEAM_COLLABORATOR_ABSTRACT
/Shared/Public Sector	BI_PSC_REPORTING_DUTY	Public Sector Folder Reporting Duty	ORA_PSC_AGENCY_STAFF_ABSTRACT, ORA_PSC_BUILDING_INSPECTOR_JOB, ORA_PSC_BUSINESS_ANALYST_JOB,

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			ORA_PSC_CHIEF_BUILDING_OFFICER_JOB, ORA_PSC_ECONOMIC_DEV_OFFICER_JOB, ORA_PSC_FINANCE_ADMIN_JOB, ORA_PSC_INSPECTIONS_SUPERVISOR_JOB, ORA_PSC_PERMIT_TECHNICIAN_JOB, ORA_PSC_PERMITS_APPLICATION_ADMINISTRATOR_JOB, ORA_PSC_PERMITS_SUPERVISOR_JOB, ORA_PSC_PLAN_COORDINATOR_JOB, ORA_PSC_PLAN_REVIEWER_JOB, ORA_PSC_PRINCIPAL_PLANNER_JOB, ORA_PSC_SYSTEM_ADMINISTRATOR_JOB
/Shared/Risk Management	BI_GRC_REPORTING_DUTY	Risk Management Folder Reporting Duty	ORA_GTG_APPLICATION_ACCESS_AUDITOR_JOB, ORA_GTG_APPLICATION_CONTROL_MANAGER_JOB, ORA_GTG_COMPLIANCE_MANAGER_JOB, ORA_GTG_ENTERPRISE_RISK_AND_CONTROL_MANAGER_JOB, ORA_GTG_RISK_MANAGEMENT_AUDITOR_JOB, ORA_GTR_USER_ACCESS_CERTIFICATION_MANAGER_JOB
/Shared/Sales	BI_ZBS_REPORTING_DUTY	Sales Folder Reporting Duty	ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZBS_SALES_MANAGER_JOB, ORA_ZBS_SALES_REPRESENTATIVE_JOB, ORA_ZBS_SALES_RESTRICTED_USER_JOB, ORA_ZBS_SALES_VP_JOB, ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB, ORA_ZSP_SALES_ANALYST_JOB
/Shared/Service	BI_SVC_REPORTING_DUTY	Service Folder Reporting Duty	ORA_CSO_KNOWLEDGE_ANALYST_JOB, ORA_CSO_KNOWLEDGE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_JOB, ORA_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_JOB, ORA_SVC_INTERNAL_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_INTERNAL_HELP_DESK_AGENT_JOB, ORA_SVC_INTERNAL_HELP_DESK_MANAGER_JOB, ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
/Shared/Subscription Management	BI_OSS_REPORTING_DUTY	Subscription Management Folder Reporting Duty	ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB
/Shared/Supply Chain Management	BI_SCM_REPORTING_DUTY	Supply Chain Management Folder Reporting Duty	ORA_ACD_PRODUCT_DESIGN_ENGINEER_JOB, ORA_ACD_PRODUCT_DESIGN_MANAGER_JOB, ORA_ACE_PRODUCT_MANAGEMENT_VP_JOB, ORA_ACE_PRODUCT_PORTFOLIO_MANAGER_JOB, ORA_CMF_FISCAL_DOCUMENT_SPECIALIST_JOB, ORA_CMF_RECEIVING_SPECIALIST_JOB, ORA_CMR_RECEIPT_ACCOUNTING_DISCRETIONARY, ORA_CSE_ASSET_ADMINISTRATOR_JOB, ORA_CST_COST_ACCOUNTANT_JOB, ORA_DOO_ORDER_ADMINISTRATOR_JOB, ORA_DOO_ORDER_MANAGER_JOB, ORA_EGI_PRODUCT_DATA_STEWARD_JOB, ORA_EGP_PRODUCT_MANAGER_JOB, ORA_ENQ_QUALITY_ANALYST_JOB, ORA_ENQ_QUALITY_ENGINEER_JOB, ORA_FOS_SUPPLY_CHAIN_CONTROLLER_JOB, ORA_INV_INVENTORY_MANAGER_JOB, ORA_INV_WAREHOUSE_MANAGER_JOB, ORA_MNT_MAINTENANCE_MANAGER_JOB, ORA_MNT_MAINTENANCE_TECHNICIAN_JOB, ORA_MSC_BACKLOG_MANAGER_JOB, ORA_MSC_DEMAND_AND_SUPPLY_PLANNER_JOB, ORA_MSC_DEMAND_PLANNER_JOB, ORA_MSC_MATERIALS_PLANNER_JOB, ORA_MSC_REPLENISHMENT_PLANNER_JOB, ORA_MSC_SALES_AND_OPERATIONS_PLANNER_JOB, ORA_MSC_SUPPLY_CHAIN_PLANNER_JOB, ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB, ORA_VCS_SUPPLY_CHAIN_COLLABORATION_PLANNER_JOB, ORA_WSH_SHIPPING_MANAGER_JOB

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
/Shared/Functional Setup	BI_FSM_REPORTING_DUTY	Functional Setups Folder Reporting Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB
/Shared/Security	FBI_SECURITY_TRANSACTION_ANALYSIS_DUTY	Security Transaction Analysis Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_FND_IT_SECURITY_MANAGER_JOB

Predefined Catalog Lockdown

If you try to modify the predefined catalog content including folder permissions, you get an alert indicating that you're not allowed to modify content and asking that you save your own content in the **/Shared/Custom** folder.

Here are a few things to know about catalog folders:

- You must save all modified content in the **/Shared/Custom** folder or in new folders in the **/Shared** folder.
- Existing modified content in the **/Shared/Custom** folder or custom folders in the **/Shared** folder and their subfolders is preserved. If you have modified the content in the predefined catalog folders, all changes are lost during any upgrade. To preserve content, archive your catalog content and unarchive it in the **Shared/Custom** folder after upgrade.
- All existing content in parent folders in the **/Shared** folder is preserved.
- You can't change folder or object permissions on the predefined catalog folders or content. For example, you can't change folder permissions to hide folders or objects.

Related Topics

- [Role Inheritance](#)
- [Archive and Move Analytics](#)
- [Submit Scheduled Processes and Process Sets](#)

Procurement Repository and Session Variables for Business Intelligence

You can use these repository and session variables in your analyses:

Variable Name	Type	Usage	Offering
CURRENT_DAY	Session Variable	Returns the value of Current Date.	All
CURRENT_MONTH	Repository Variable	Returns the value of Current Month in the YYYY/MM format.	All

Variable Name	Type	Usage	Offering
CURRENT_WEEK	Repository Variable	Returns the value of the current week in YYYY Week nn format.	All
CURRENT_QUARTER	Repository Variable	Returns the value of Current Quarter in YYYY Q n format.	All
CURRENT_YEAR	Repository Variable	Returns the value of Current Year in the YYYY format.	All
NEXT_MONTH	Repository Variable	Returns the value of Next Month in the YYYY / MM format.	All
NEXT_WEEK	Repository Variable	Returns the value of Next Week in the YYYY Week nn format.	All
NEXT_QUARTER	Repository Variable	Returns the value of Next Calendar Quarter in the YYYY Q nn format.	All
NEXT_YEAR	Repository Variable	Returns the value of Next Year in the YYYY format.	All
PREVIOUS_MONTH	Repository Variable	Returns the value of Previous Month in the YYYY/MM format.	All
PREVIOUS_WEEK	Repository Variable	Returns the value of Previous Week in the YYYY Week nn format.	All
PREVIOUS_QUARTER	Repository Variable	Returns the value of Previous Quarter in the YYYY Q nn format.	All

This variable is available for only Oracle Fusion Cloud Procurement:

Variable Name	Type	Usage	Offering
PO_ACK_FEATURE_INDICATOR	Repository Variable	Returns Y or N to indicate whether the customer has enabled the opt-in to skip the supplier acknowledgment phase.	Procurement

3 Subject Areas

Procurement Subject Areas, Folders, and Attributes

To create real-time analyses, you should be familiar with the Oracle Business Intelligence concepts of subject areas, folders, and attributes.

Subject Areas

To create an analysis, you begin by selecting a subject area and then select columns of information to include in the analysis.

For a complete list of procurement-specific subject areas, see the *Oracle Fusion Cloud Procurement: Subject Areas for Transactional Business Intelligence in Procurement*

Folders

Each subject area has one fact folder and a number of dimension folders. Fact folders contain attributes that can be measured, meaning that they're numeric values like order quantity and order amount. A special folder, called a Degenerate Dimension, is also associated with the fact folder. Each dimension folder is joined to the fact folder within a subject area.

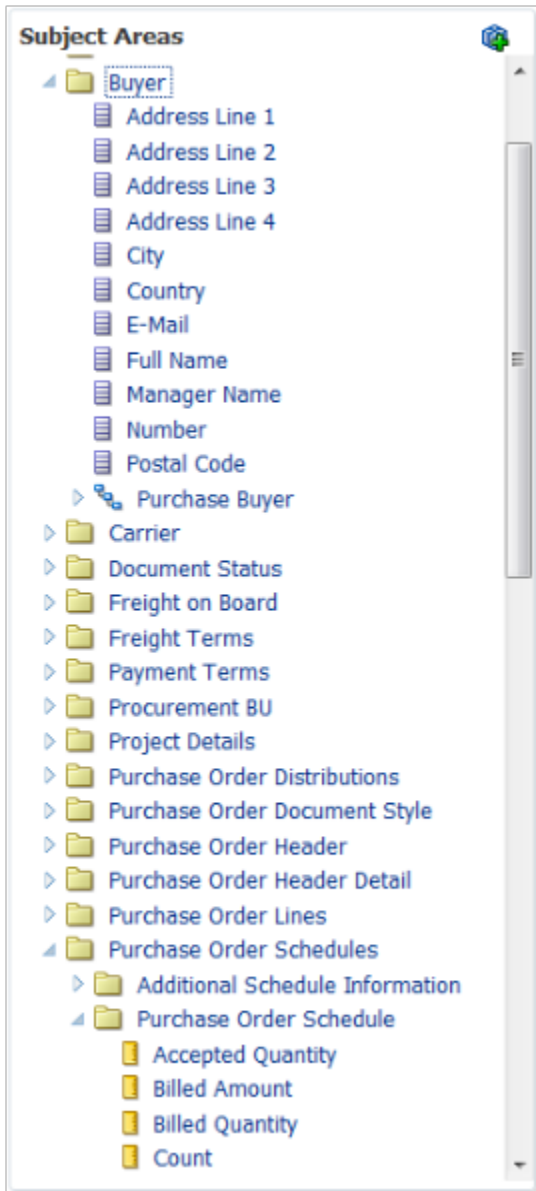
Some folders, such as Buyer, Procurement BU, and Requisitioning BU, appear in more than one subject area. These are referred to as common folders or common dimensions. Fact folders are usually at the bottom of the list of folders and named after the subject area.

Each fact has a different level of granularity. For example, Buyer has contact details.

Attributes

Finally, each dimension folder contains attributes, such as address, item details, and so on.

This figure illustrates the structure of subject areas, folders, and facts.



In the preceding figure, the following OTBI components are shown:

- Subject area: Procurement - Purchasing Real Time
- Dimension presentation folder: Buyer
- Dimension attributes: Address Line 1, City, Country, Full Name. and so forth
- Fact presentation folder: Purchase Order Schedules
- Fact measures: Accepted Quantity, Billed Amount, Billed Quantity, Count

Related Topics

- [Subject Areas for Transactional Business Intelligence in Procurement](#)

4 Flexfields

Overview of Flexfield Use in Analyses

Flexfields are extensible sets of placeholder fields associated with business objects that can be placed on application pages. They're used to extend business objects and meet your data management requirements without changing the data model or performing any database programming.

To include flexfields you have used for extension for use in analyses, you must enable them for business intelligence.

Extension of analyses using flexfields is available for Oracle Enterprise Resource Planning Cloud and Oracle Human Capital Management Cloud.

Flexfield Types

The following types of flexfields are available and provide a means to modify application features without programming:

- Descriptive
- Extensible
- Key

Depending on the flexfield type, business intelligence enablement is performed differently and has different requirements. Once they are enabled for business intelligence, you can import any changes made to flexfields automatically using an import scheduled process.

Configure Key Flexfields for Transactional Business Intelligence

Enable Key Flexfields for Business Intelligence Reporting

To include flexfields in your analyses, you must enable them for Business Intelligence. Extensibility of analysis using flexfields is used for Enterprise Resource Planning and Human Capital Management. For Customer Relationship Management, the Extensibility Framework supports this.

To designate key flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. On the Manage Key Flexfields page, enter your search value in Key Flexfield Code.
3. Click **Manage Structure Instances**.
4. Enter your search value in Structure Instance Code.
5. Click **Edit** to display the Edit Key Flexfield Structure Instance dialog box.
6. Select the **BI Enabled** option, then click **OK**.
7. For each flexfield segment instance, repeat steps 5 through 6.
8. Click **Save**.

9. Populate the BI Object Name for each of the segment labels:

- a. Query the Key Flexfield Code in the Manage Key Flexfields window.
- b. From the Actions menu, select **Manage Segment Labels**.
- c. Populate the BI Object Name for each segment label to be mapped. The BI Object Name for the following qualified segment labels should not be modified:

Segment Label Code	BI Object Name
FA_COST_CTR	Dim - Cost Center
GL_BALANCING	Dim - Balancing Segment
GL_ACCOUNT	Dim - Natural Account Segment

Before you deploy a flexfield, you must access the Chart of Accounts Instance and assign the newly created segment label to the appropriate segment in the Chart of Accounts.

- d. Click **Deploy Flexfield**.
- e. Click **Save and Close**.

Related Topics

- [Considerations for Enabling Key Flexfield Segments for Business Intelligence](#)
- [How do I update existing setup data?](#)

Overview of Supported Key Flexfields

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

Product Area	Key Flexfield	Dimension
Fixed Assets	Category (CAT#)	Dim - Asset Category
Fixed Assets	Location (LOC#)	Dim - Asset Location
General Ledger	Accounting (GL#)	Dim - Balancing Segment Dim - Cost Center Dim - Natural Account
Payroll	Costing	Dim - Costing Segments

Product Area	Key Flexfield	Dimension
Supply Chain Management	Locator	Dim - Inventory Org
Supply Chain Management	Item Category	Dim - Item
Revenue Management	Pricing Dimensions (VRM)	Dim - VRM Segment
Budgetary Control	Budgeting (XCC)	Dim - XCC Segment

Map Non-Qualified Segments to BI Objects

To map non-qualified segments that must be mapped and used in analysis, create a new label and associate a BI object with the label. Associate this new segment label with the segment code.

To map non-qualified segments to BI objects:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. On the Manage Key Flexfields page, search for the appropriate key flexfield code.
3. From the Actions menu, select **Manage Segment Labels**.
4. Click the **Add Row** icon.
5. Enter the details for the Segment Label Code, including name, description, and BI Object name. Enter the BI object names carefully and note whether there is a space between **Segment** and the number.

This table provides examples of Key Flexfields and associated BI object names.

Key Flexfield	BI Object Name
Accounting (GL)	Dim - GL Segment1 through Dim - GL Segment10
Budgetary Control (XCC)	Dim - XCC Segment1 through Dim - XCC Segment10
Revenue Management (VRM)	Dim - VRM Segment 1 through Dim - VRM Segment 10

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

Set Up the GL Accounting Flexfields

This topic describes the workflow for setting up Accounting key flexfields, but these steps also apply for other key flexfields.

- Understanding Accounting Key Flexfields

- Identifying Accounting Key Flexfields
- Assigning Unique Segment Labels
- Performing Column Flattening
- Designating GL Accounting Segment Instances as BI-Enabled
- Deploying Accounting Key Flexfields

Understanding Accounting Key Flexfields

The Accounting Key Flexfield is used to identify GL accounts.

A chart of accounts segment is a component of the accounting key flexfield. Each segment has a value set attached to it to provide formatting and validation of the set of values used with that segment. The combination of segments creates the account combination used for recording and analyzing financial transactions. You must set up your Chart of Accounts (COA) as part of implementing Oracle Applications Cloud.

Examples of segments that may be found in a chart of accounts structure include Company, Cost Center, Department, Division, Region, Account, Product, Program, and Location.

The Natural Account segment of the General Ledger Accounting Key Flexfield defines the account used in the account combination to record transactions.

The logical segment dimensions in the Oracle BI metadata are `Dim - Cost Center`, `Dim - Balancing Segment`, `Dim - Natural Account Segment` and all `Dim - GL Segmentn` dimensions. These dimension tables are populated from a Tree value object or from a Value Set value object. Which value is used depends on whether a tree was associated with the segment in the Oracle Applications Cloud setup:

- For each segment associated with trees, two value objects are generated (Tree and TreeCode) with the following naming structure:

```
FscmTopModelAM.AccountBIAM.FLEX_TREE_VS_segmentlabel_VI &
```

```
FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_segmentlabel_VI
```

- For each segment without trees, one view object is generated with the following naming structure:

```
FscmTopModelAM.AccountBIAM.FLEX_VS_ XXX_VI
```

In addition to the segment dimension tables, the BI Extension process also extends `Flex BI Flattened VO`; `FscmTopModelAM.AccountBIAM.FLEX_BI_Account_VI`. This view object has a pair of columns for each segment; `segmentlabel_` and `segmentlabel_c`.

For example, for your Cost Center segment which has the segment label `FA_COST_CTR`, there are two columns in this view object, named `FA_COST_CTR_` and `FA_COST_CTR_c`.

Identifying Accounting Key Flexfield Segments

Identify and map segments of the chart of accounts.

For each Chart of Accounts (Accounting Key Flexfield) used to analyze Transactional Business Intelligence facts, identify the segments of the chart of accounts. Map them to the Transactional Business Intelligence GL Accounting Segment logical dimensions.

Accounting Key Flexfield Segment	Segment Label	Transactional Business Intelligence GL Accounting Segment Logical Dimension
Balancing	GL_BALANCING	Dim - Balancing Segment
Natural Account	GL_ACCOUNT	Dim - Natural Account Segment
Cost Center	FA_COST_CTR	Dim - Cost Center
Other segments to be equalized across the charts of accounts	Other unique segment label	Dim - GL Segment n where n is an integer from 1 to 10

Assigning Unique Segment Labels

You must assign a unique segment label to the charts of accounts segments that are the balancing segments or the natural account segments. The segments must be also used for specific purposes.

For example, assign the Primary Balancing segment label to the segment used for your company or legal entities. That label provides a correct recording of intercompany transactions and company analysis. You can assign other segment labels when required.

To assign unique segment labels to charts of accounts segments:

1. In the Setup and Maintenance work area, go to the **Manage Charts of Accounts** task and then navigate to the Manage Chart of Accounts page.
2. In the Search section, enter the GL# for the **Key Flexfield Code** and click the **Search** button.
3. In the Search Results section, select **Accounting Flexfield** and click the **Manage Structures** button to navigate to Manage Key Flexfield Structures.
4. In the Search section, enter the chart of accounts code or the name for Structure Code or Name and click the **Search** button.
5. In the Search Results section, select the chart of accounts and click **Edit** to navigate to the Edit Key Flexfield Structure window
6. Select the **Enabled** check box to code-enable the Structure code.
7. In the Segments section, select the applicable segments and click **Edit** to navigate to the Edit Key Flexfield Segment window.
8. Select the Enabled check box to enable the segments.
9. In the Segment Labels section, select the unique segment labels to equalize the segments across the charts of accounts. Click the **shuttle** to move the segments to the selected list.
10. Click **Save and Close** to return to the Edit Key Flexfield Structure window.
11. Click **Done** to return to the Manage Key Flexfields window.

Performing Column Flattening

Column flattening of trees is required in order for OTBI hierarchy analyses to be populated with correct data.

To flatten columns for account hierarchies:

1. In the Setup and Maintenance work area, go to the **Manage Trees and Tree Versions** task and navigate to the Manage Trees and Tree Versions window.
2. In the Search section, enter **GL_ACCT_FLEX** for the Tree Structure Code and the involved tree code or name, and click **Search**.

3. In the Search Results section, select the tree version you want to flatten. If the status of the Tree Version is Draft, to make the Tree Version active, select **Actions**, then **Status**, and then **Active**.
4. (Optional): After the tree version is specified, perform an audit on the Tree Version to ensure its integrity before launching the flattening job. Select **Actions** and then **Audit**. See the section on working with Trees in the Developer's Guide.
5. Choose **Column Flattening** from the **Actions** menu.
6. Click the **Online Flattening** button to launch the flattening job immediately. Or, click the **Schedule Flattening** button to schedule the flattening job according to your requirements.

Designating GL Accounting Segment Instances as BI-Enabled

Specify the applicable chart of accounts segment instances that are BI-enabled to make them available for use in Transactional Business Intelligence.

To specify the chart of accounts segment instances as BI-enabled:

1. In the Search Results section of the Manage Key Flexfields window, select **Accounting Flexfield** and click the **Manage Structure Instances** button to navigate to the Manage Key Flexfield Structure Instances window.
2. In the Search section, select the chart of accounts for Structure Name and click the **Search** button.
3. In the Search Results section, select the structure instance and click **Edit** to navigate to the Edit Key Flexfield Structure Instance window.
4. Check the **Enabled** check box to code-enable the structure instance.
5. In the Segment Instances section, select the segment instances and click **Edit** to update. Each of the segment instances must be selected individually.
6. Select the **Business Intelligence enabled** check box in the Edit Key Flexfield Segment pop-up window and click **OK** to return to Edit Key Flexfield Structure Instance window.
7. After you have enabled all applicable segment instances for Business Intelligence, click **Save and Close** to save the changes and return to the Edit Key Flexfield Structure Instance window.
8. Repeat steps 2 - 6 for each chart of accounts to enable all the applicable segment instances for Business Intelligence.
9. Click **Done** to return to the Manage Key Flexfields window.
10. After you have configured all the charts of accounts, click the **Deploy Flexfield** button to deploy the Accounting Flexfield and make the latest definition available for use.

Deploying Accounting Key Flexfields

After you have set up accounting key flexfields, you must deploy them.

Accounting key flexfields have one of the following deployment statuses:

- Edited: The flexfield definition has not been deployed or changes have been made to the structure, the structure instances, or the value sets.
- Patched: The flexfield definition has been modified through an update, but the flexfield has not yet been deployed so the updated definition is not reflected.
- Deployed to Sandbox: The flexfield is deployed and available in a flexfield-enabled sandbox.
- Deployed: The flexfield definition is deployed and available to end users.
- Error: The deployment attempt failed.

To deploy accounting key flexfields:

1. In the Setup and Maintenance work area, go to the **Manage Chart of Accounts** task.
2. Click **Search**.
3. Locate the Deployment Status column.

4. Click the icon.
5. Select **Edited**.
6. Click **Deploy Flexfield**.
7. Monitor the Deployment Status and when it reaches 100% click **OK**.
8. Verify that a check mark displays in the Deployment Status column.
9. Click **Done**.

Configure Descriptive Flexfields for Transactional Business Intelligence

Overview of Transactional Business Intelligence Configuration of Descriptive Flexfields

Configure descriptive flexfields to track unique information not typically found on business forms.

Descriptive flexfields can store several important details on a form without cluttering it. For example, several details may make an asset form heavy and unmanageable. However, the user still needs to access those details and therefore, they must be present on the form. In such cases, descriptive flexfields are convenient to use and are easy to manage.

Descriptive flexfields provide a way for you to add attributes to entities and to define validation and display properties for them. A descriptive flexfield is a logical grouping of attributes (segments) that are mapped to a set of extension columns which are shipped as part of Oracle Applications Cloud tables.

Related Topics

- [Configure Descriptive Flexfield Segments](#)
- [Set Descriptive Flexfields as BI-Enabled](#)

Configure Descriptive Flexfield Segments

If a descriptive flexfield is enabled for Oracle Business Intelligence, you can enable global and context segments for Oracle Business Intelligence, and you can select segment labels. Not all descriptive flexfields are supported for Business Intelligence.

Configuring a Descriptive Flexfield Segment

If a descriptive flexfield is enabled for Oracle Business Intelligence, you can enable global and context segments for Oracle Business Intelligence, and you can select segment labels. Not all descriptive flexfields are supported for Business Intelligence.

To configure available descriptive flexfield segments:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
2. If the **BI Enabled** option is cleared, select it.

3. Select the options for deployment of the descriptive flexfields.

Related Topics

Set Descriptive Flexfields as BI-Enabled

If a descriptive flexfield is already defined, you can enable it for use in Business Intelligence reports. Not all descriptive flexfields are supported for Business Intelligence.

Setting a Flexfield as BI-Enabled

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
2. Navigate to the **Edit Descriptive Flexfields** window.
3. Enter the descriptive flexfield name.
4. Check the **BI Enabled** option on the desired descriptive flexfields. If the option is unavailable, the flexfield is a non-supported entity.
5. Click **OK**.
6. Click **Save**.

Import Changes to Flexfields Automatically

Overview of Flexfield Change Import

You can use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process to import your flexfield changes.

Use the Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process to automatically import the following types of changes:

- Key Flexfield changes
- Descriptive Flexfield changes
- Extensible Flexfield changes

The Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process imports extensible data, including data in descriptive flexfield segments, key flexfield segments, and General Ledger balances in Essbase cubes.

If you have changes to key flexfields and descriptive flexfields, you can import all the changes in the same scheduled process.

This is an Oracle Applications Cloud scheduled process; it's not related to BI Applications. Detailed information on this process can be found in Oracle Applications Cloud documentation.

Note: We strongly recommend that you backup the Oracle Transactional Business Intelligence prior to importing any flexfield changes. Running the process disconnects all users from the server. You should not run this process when maintenance operations or system updates are being performed on the server.

Performance and Flexfields

Flexfield changes and additions increase the size of the metadata repository and over time can cause performance issues or the repository size to exceed limitations. We recommend that you import and enable for BI only those flexfields that are required. To preserve performance, the following guidelines should be kept in mind:

- Don't BI-enable extensible flexfield (EFF) attributes that aren't needed for analysis in OTBI.
- Disable EFF attributes that are no longer being used. Limit the number of attributes that are inherited by a large number of classes to be BI enabled, as this results in increased repository size.

Extensible Flexfields and Repository Size

If all BI-enabled attributes are assigned at the root level, then the repository size calculation is the total number of item classes multiplied by the number of BI-enabled attributes. If not, the size calculation is based on the number of child item classes for an item class to which the BI-enabled attribute is assigned.

Let's look at an example. If BI-enabled attribute ABC is assigned to item class XYZ and it has 10 child item classes, it would generate a segment for each. So BI-enabled segments at item class XYZ (in this case having only one attribute, ABC) would be 10. Also note that the EFF attributes are copied in each subject area of the repository where the Item dimension is used. So, if there are 20 subject areas with the Item dimension, the ABC attribute appears in all of them, thus showing up 200 times, or 10 segments multiplied by 20.

Run the Import Scheduled Process

To import changes, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence scheduled process.

Run the Job

To run the process:

1. In the **Scheduled Processes** window, select **Search and Select: Name**.
2. Select **Search and Select: Name**.
3. Highlight **Import Oracle Fusion Data Extensions for Transactional Business Intelligence**.
4. Click **OK**.
5. Schedule the process.

Process Status Conditions

When the process is finished, the **biExtenderCMDUtility.jar** writes the status of the process into the JNDI file **ess_biExtenderEssJob_jobStatus**, which can be viewed in Oracle WebLogic Server.

The process status displays one of the following conditions:

- **INIT:** The process has just begun and is waiting for the extender command line JAR to update the status with more details.
- **COMPLETED_NO_EXTENSION_NEEDED:** No new Flexfield changes were detected in any of the Oracle Applications Cloud sources; because the Oracle Business Intelligence is already synchronized with all Flexfield changes, no changes were made in the Oracle Business Intelligence.

- **COMPLETED:** Oracle Business Intelligence was successfully updated with Flexfield changes and uploaded into the Oracle Business Intelligence Server.
- **COMPLETED: PROCESS_ERRORS:** Oracle Business Intelligence was updated with the Flexfield changes but with some warnings that require manual intervention.
- **FAILED:** Error conditions exist that require manual intervention.

Successful Import Process

If the import process is successful, you can perform the following actions:

- Query subject areas by segment dimensions such as Balancing Segment and Cost Center.
- Access DFF attributes for analyses.
- Use the General Ledger - Balances Real Time subject area to query Oracle Essbase cubes.

Disable Flexfields as BI-Enabled

Overview

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

There may be times, such as during development phases, when you try using a flexfield and later determine it is no longer needed.

Note: If you are considering disabling flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence. If you disable a flexfield, it cannot be deployed. Also, error conditions may occur if you disable a descriptive flexfield that has been implemented in BI Applications. If error conditions arise from disabling flexfields as BI-enabled, troubleshooting the errors can be difficult and time-consuming.

Related Topics

- [Disable Key Flexfields as BI-Enabled](#)
- [Disable Descriptive Flexfields as BI-Enabled](#)
- [Disable Extensible Flexfields as BI-Enabled](#)

Disable Key Flexfields as BI-Enabled

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling key flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence.

Disabling Key Flexfields

To disable key flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Key Flexfields** task.
2. Enter your search value in **Key Flexfield Code**.
3. Click **Manage Structure Instances**.
4. Enter your search value in **Structure Instance Code**.
5. Click **Edit**. The Edit Key Flexfield Structure Instance dialog box displays.
6. In **Edit Key Flexfield Segment Instance**, deselect the **BI Enabled** option.
7. Click **OK**, then **Save**.

Disable Descriptive Flexfields as BI-Enabled

If you created a flexfield that you no longer want to use or report against, you can disable the flexfield as BI-enabled.

If you are considering disabling descriptive flexfields, keep in mind that any flexfields created in Oracle Applications Cloud must be designated as BI-enabled to be exposed in Transactional Business Intelligence.

Disabling Descriptive Flexfields

To disable descriptive flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.
2. Enter the **Descriptive Flexfield Name**.
3. Deselect the **BI Enabled** option on the desired descriptive flexfields.
4. Click **OK**, then **Save**.

Procurement Descriptive Flexfields for Business Intelligence

This table shows the descriptive flexfields supported in Oracle Fusion Cloud Procurement and Oracle Self Service Procurement along with the applicable subject areas, folders, parent folders, and logical dimensions.

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Logical Dimension
HZ_PARTY_SITES	Supplier Import - Supplier Real Time	Standard Address Level DFFs	Supplier Addresses	Dim - Supplier Addresses
HZ_PERSON_PROFILES	Supplier Import - Supplier Real Time	Standard Contact Level DFFs	Supplier Contacts	Dim - Supplier Contacts
POR_REQ_DISTRIBUTIONS	Procurement - Requisitions Real Time	Requisition Distribution Detail	Requisition Distribution	Dim - Purchase Requisition Details

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Logical Dimension
POR_REQUISITION_HEADERS	Procurement - Requisitions Real Time	Requisition Header Detail	N/A	Dim - Purchase Requisition Details
POR_REQUISITION_LINES	Procurement - Requisitions Real Time	Requisition Line Detail	Requisition Line	Dim - Purchase Requisition Details
PO_DISTRIBUTIONS	Procurement - Purchasing Real Time	Purchase Order Distribution Detail	Purchase Order Distributions	Dim - Purchase Order Details
PO_DISTRIBUTIONS	Procurement - Pending Change Orders Real Time	Purchase Order Pending Change Order Distribution Detail	Pending Change Distributions	Dim - Draft Purchase Order Details
PO_HEADERS	Procurement - Purchasing Real Time	Purchase Order Header Detail	N/A	Dim - Purchase Order Details
PO_HEADERS	Procurement - Purchasing Agreements Real Time	Blanket Agreement Header Detail	N/A	Dim - Purchase Agreement Details
PO_HEADERS	Procurement - Purchasing Agreements Real Time	Contract Agreement Detail	N/A	Dim - Purchase Agreement Details
PO_HEADERS	Procurement - Pending Change Orders Real Time	Purchase Order Pending Change Order Header Detail	N/A	Dim - Draft Purchase Order Details
PO_HEADERS	Procurement - Pending Change Orders Real Time	Blanket Agreement Pending Change Order Header Detail	N/A	Dim - Draft Purchase Order Details
PO_HEADERS	Procurement - Pending Change Orders Real Time	Contract Agreement Pending Change Order Detail	N/A	Dim - Draft Purchase Order Details
PO_LINES	Procurement - Purchasing Real Time	Purchase Order Line Detail	Purchase Order Lines	Dim - Purchase Order Details
PO_LINES	Procurement - Purchasing Agreements Real Time	Blanket Agreement Line Detail	Blanket Agreement Lines	Dim - Purchase Agreement Details
PO_LINES	Procurement - Pending Change Orders Real Time	Purchase Order Pending Change Order Line Detail	Pending Change Order Lines	Dim - Draft Purchase Order Details
PO_LINES	Procurement - Pending Change Orders Real Time	Blanket Agreement Pending Change Order Line Detail	Pending Change Order Lines	Dim - Draft Purchase Order Details

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Logical Dimension
PO_LINE_LOCATIONS	Procurement - Purchasing Real Time	Purchase Order Schedule Detail	Purchase Order Schedules	Dim - Purchase Order Details
PO_LINE_LOCATIONS	Procurement - Purchasing Agreements Real Time	Blanket Agreement Price Break Detail	Blanket Agreement Price Breaks	Dim - Purchase Agreement Details
PO_LINE_LOCATIONS	Procurement - Pending Change Orders Real Time	Purchase Order Pending Change Order Schedule Detail	Pending Change Schedules	Dim - Draft Purchase Order Details
PO_LINE_LOCATIONS	Procurement - Pending Change Orders Real Time	Blanket Agreement Pending Change Order Price Break Detail	Pending Change Schedules	Dim - Draft Purchase Order Details
PO_NOTIFICATION_CONTROLS	Procurement - Purchasing Agreements Real Time	Contract Agreement Notification Controls	N/A	Dim - Agreement Notification Controls
PO_ATTRIBUTE_VALUES	Procurement - Purchasing Agreements Real Time	Blanket Agreement Item Attributes	Blanket Agreement Lines	Dim - Purchase Agreement Details
PO_LINE_TYPES	Procurement - Pending Change Orders Real Time	Purchasing Line Type	Pending Change Order Lines	Dim - Purchase Line Type
PO_LINE_TYPES	Procurement - Purchasing Agreements Real Time	Purchasing Line Type	Blanket Agreement Lines	Dim - Purchase Line Type
PO_LINE_TYPES	Procurement - Purchasing Real Time	Purchasing Line Type	Purchase Order Lines	Dim - Purchase Line Type
PO_LINE_TYPES	Procurement - Requisitions Real Time	Purchasing Line Type	Requisition Line	Dim - Purchase Line Type
PO_LINE_TYPES	Sourcing - Supplier Awards Real Time	Purchasing Line Type	N/A	Dim - Purchase Line Type
PO_LINE_TYPES	Sourcing - Supplier Negotiations Real Time	Purchasing Line Type	Negotiation Line	Dim - Purchase Line Type
PO_LINE_TYPES	Sourcing - Supplier Responses Real Time	Purchasing Line Type	Response Line	Dim - Purchase Line Type
PON_AUCTION_HEADERS	Sourcing - Supplier Negotiations Real Time	Negotiation Header Detail	Negotiation Header	Dim - Sourcing Negotiation Details
PON_AUCTION_ITEM_PRICES	Sourcing - Supplier Negotiations Real Time	Negotiation Line Detail	Negotiation Line	Dim - Sourcing Negotiation Details

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Logical Dimension
PON_PROGRAM_HEADERS	Sourcing - Program Real Time	Program Detail	N/A	Dim - Sourcing Program Details
POQ_ASSESSMENTS	Supplier Qualification - Qualifications and Assessments Real Time	Assessment Detail	Assessments	Dim - Assessment Details
POQ_INITIATIVES	Supplier Qualification - Qualifications and Assessments Real Time	Initiative Detail	N/A	Dim - Initiative Details
POQ_QUALIFICATIONS	Supplier Qualification - Qualifications and Assessments Real Time	Qualification Detail	Qualifications	Dim - Qualification Details
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Procurement - Implemented Change Orders Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Procurement - Pending Change Orders Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Procurement - Procure To Pay Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Procurement - Spend Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Procurement - Purchasing Agreements Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Procurement - Purchasing Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Procurement - Requisitions Real Time	Suggested Supplier	Requisition Line	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Sourcing - Supplier Awards Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Sourcing - Supplier Responses Real Time	Supplier Profile	Response Line	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Supplier - Supplier Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Supplier Import - Supplier Real Time	Supplier Profile	Suppliers	Dim - Supplier

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Logical Dimension
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Supplier Registration - Supplier Registration Real Time	Supplier Profile	Suppliers	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Supplier Qualification - Question Responses Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Payables Invoices - Holds Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Payables Invoices - Installments Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Payables Invoices - Prepayment Applications Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Payables Invoices - Transactions Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Payables Invoices - Trial Balance Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Payables Invoices - Withholding Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Payables Payments - Disbursements Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Payables Payments - Payment History Real Time	Supplier	N/A	Dim - Supplier
POZ_SUPPLIERS (same as JE_POZ_SUPPLIERS)	Subledger Accounting - Journals Real Time	Supplier Profile	N/A	Dim - Supplier
POZ_SUPPLIER_REGISTRATIONS	Supplier Registration - Supplier Registration Real Time	Company Details	N/A	Dim - Supplier Registration Request Details
POZ_SUPPLIER_SITES_ALL_M (same as JE_POZ_SUPPLIER_SITES)	Procurement - Implemented Change Orders Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ALL_M (same as JE_POZ_SUPPLIER_SITES)	Procurement - Pending Change Orders Real Time	Supplier Site	N/A	Dim - Supplier Sites

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Logical Dimension
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Procurement - Spend Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Procurement - Purchasing Agreements Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Procurement - Purchasing Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Procurement - Requisitions Real Time	Suggested Supplier Site	Requisition Line	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Sourcing - Supplier Awards Real Time	Response Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Sourcing - Supplier Responses Real Time	Supplier Site	Response Line	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Sourcing - Supplier Negotiations Real Time	Invited Supplier Site	Invited Suppliers	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Supplier - Supplier Real Time	Supplier Site Details	Supplier Sites	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Supplier Import - Supplier Real Time	Site Details	Supplier Sites	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Supplier Qualification - Question Responses Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Payables Invoices - Holds Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Payables Invoices - Installments Real Time	Supplier Site	N/A	Dim - Supplier Sites

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Logical Dimension
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Payables Invoices - Prepayment Applications Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Payables Invoices - Transactions Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Payables Invoices - Trial Balance Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Payables Payments - Disbursements Real Time	Supplier Site	N/A	Dim - Supplier Sites
POZ_SUPPLIER_SITES_ ALL_M (same as JE_POZ_ SUPPLIER_SITES)	Payables Payments - Payment History Real Time	Supplier Site	N/A	Dim - Supplier Sites

5 Analytics, Reports, and Dashboards Modification

Analyses and Dashboards

How Data Is Structured for Analytics

The business intelligence (BI) repository contains the metadata that defines which columns you can include in analyses, and the source of that data. The repository is organized into subject areas, which contain folders with the columns.

Note: You can also use the BI repository as a data source for reports.

Columns

This table describes the three types of columns available when you create or edit analyses.

Column Type	Description	Example
Fact	Provides a measure of something, meaning that the values are numbers.	Total
Attribute	Represents a piece of information about a business object, with values that are dates, IDs, or text. Note: Attribute columns can be flexfield segments imported into the BI repository.	Start Date
Hierarchy	Holds data values that are organized in a hierarchical manner.	Time, with sublevels: • Year • Quarter • Month

Subject Areas

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

For product families that use Application Composer, you can create custom subject areas to accommodate custom objects or to add new facts for analysis.

Folders

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

- **Fact folders:**
 - Contain fact columns.
 - Are usually the last in a list of folders and are usually named after the subject area.

- **Dimension folders:**
 - Contain attribute and hierarchical columns.
 - Are joined to the fact folder within a subject area.

For example, if your analysis has the Currency attribute from a dimension folder, you see currencies in the results. If you also add the Total fact, then your analysis includes only records with both a currency and a total amount. The more columns you add, the smaller the query set for your analysis.

- Can be common folders, or common dimensions, that appear in more than one subject area.

If your analysis has columns from multiple subject areas, then you:

- Should include columns only from dimension folders that are common to all of those subject areas. At least one such column is required.
- Must include one column from the fact folder in each of those subject areas.

Related Topics

- [Create and Edit Analyses Using a Wizard](#)
- [Create and Modify Analyses and Dashboards](#)
- [Manage Analytics with Advanced Features](#)
- [About Custom Subject Areas](#)

Create and Edit Analyses Using a Wizard

Use the wizards to quickly create and edit your analyses. You can use a wizard to create and edit most of your analytics, for example to select columns, add filters or views.

You can also use advanced business intelligence features to create or edit dashboards or manage analyses and other objects in the catalog.

1. Start the wizard from the Reports and Analytics work area or the Reports and Analytics panel tab (if available).
 - To create a new analysis click **Create** and select **Analysis**. Select a subject area for your analysis and click the **Continue** button.
 - To edit an existing analysis, in the Reports and Analytics work area, select it in a folder or the favorites list, click its ellipsis icon and select **Edit**. In the Reports and Analytics panel tab, click the analysis, then click **Edit**.
2. In the Select Columns page, optionally, click **Add/Remove Subject Areas** and, in the Add/Remove Subject Areas dialog box, select more subject areas or remove any that you no longer need, and click **OK**. You can't remove the original subject area selected for the analysis. To remove any other subject area, first remove its columns from the analysis.
3. From here on, make selections in a series of analysis-definition pages, selecting Next or Back to navigate among them.
 - In the Select Columns page, expand your subject area and folders within it to choose the columns to include in your analysis. Also set options for those columns.
 - In the Select Views page, determine whether your analysis is to include a table, a graph, or both. For either, select among several types. If you include both, select the order in which they appear.
 - In Edit Table and Edit Graph pages, select options that apply to your table and graph layouts. Each of these pages is active only if you selected the item it applies to in the Select Views page.
 - In the Sort and Filter page, optionally apply filters to columns to refine the selection of records in your analysis, and apply sorts to them to order your results.
 - In the Highlight page, optionally add color highlights based on numeric thresholds you set.
 - In the Save page, enter a name for the analysis, select a catalog folder to save it in, and click **Submit**.

In general, these pages are designed so that procedures for using them are readily apparent. Even so, here are some things you will want to know.

Select Columns Page

For each column in your analysis, you select an Interaction option.

- Two of the options, Default and Drill, do the same thing: If you click on a column header, the analysis adds a column displaying values at the next hierarchical level. (For example, if you click on Control Name, the analysis adds a Control ID column.) If you click on a column value, the analysis adds the subordinate column, but also filters to display only records containing the value you clicked.
- Navigate to Transaction: If you click on a value from a column for which this option is set, the analysis presents a link to the record of an object the value applies to.

For such links to work, however, further configuration is required: You need to define paths to the records that are to be opened. If you want to use this option, you're probably better off creating the analysis in the BI Catalog. However, you can create it in the wizard, then edit it in the BI Catalog. See the topic titled Link Analyses to Application Pages.

- None: This option in effect turns the Default option off and turns nothing on. Nothing happens if you click on a value in a column for which this option is set.

For each column, you can also select a Hidden option. This prevents the analysis from displaying the column, but leaves its values available for use behind the scenes, for example in filters.

Select Views Page

You can add a graph to your analysis only if it includes at least one column from a fact folder. (You can include a table in your analysis no matter what columns you select for it.) A fact column contains numeric values, such as counts of incidents returned by advanced controls. Other columns contain attributes of objects, such as names of advanced controls. Without numeric values, there's nothing to base a graph on.

You can create a title for the analysis in this page, but doing so is optional. You also create a name for the analysis in the Save page, and that one is required. If you create both, the analysis displays both; they don't have to be the same.

You can use a Preview option to ensure the analysis returns data you expect. Turn it on or off in this page or in subsequent wizard pages. Once it's on, the preview remains on in other wizard pages you navigate to, unless you turn it off.

Edit Table Page

Here are the layout options you can select for tables:

- **Columns:** This is the default. Each column you assign this value to appears as a column in the table.
- **Prompt For:** In a prompt field, you select among values from the column you're configuring. For example, you would select a date if the column were Calendar Month Start Date. The table would then display only rows containing the value you selected.
- **Section By:** The table is divided into sections. Each value of the column you're configuring becomes a header, and the section beneath each header includes rows containing that value.
- **Excluded:** The column you select is no longer available to the view you're configuring. The column is hidden, and its values are unavailable for behind-the-scenes tasks such as filtering. However, the column remains available to other views in your analysis.

Edit Graph Page

You can't apply layout options to fact columns. For other columns, graph layout options include Prompt For, Section By, and Excluded, which have the same effect as they do in tables. You can also apply these options in graphs:

- **Vary Color By:** Each value in the column you're configuring is represented by a distinct color in the graph.
- **Group By:** Values in the columns you assign this option to are combined in the graph. For example, if you select this option for the State and Calendar Month Start Date columns in a bar graph, each bar represents a particular status on a particular date.

Highlight Page

You can use this feature only if your analysis includes at least one fact column, and you can apply it only to fact columns.

Related Topics

- [View Analytics, Reports, and Dashboards](#)
- [Where to Save Analytics and Reports](#)
- [How Data Is Structured for Analytics](#)
- [Manage Analytics with Advanced Features](#)

Reports

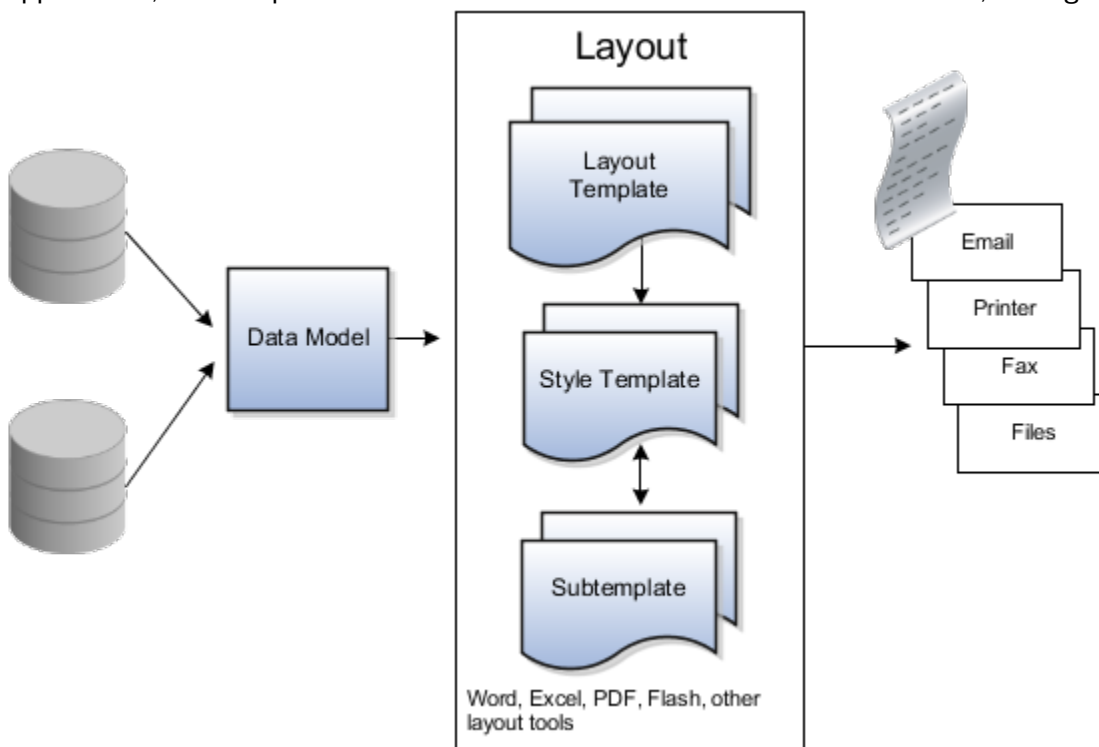
Overview of Analytics Publisher

Oracle Analytics Publisher enables you to author, generate, and deliver all types of highly formatted documents and operational reports.

You can use familiar office desktop tools to create rich text format (.rtf) documents and reports against any data source. You can view reports, schedule them to run, and distribute them to predefined destinations.

Reports consist of one or more .rtf layouts, a reference to a data model, and a set of properties. A report may also include style templates and subtemplates, which allow reusability of functionality and maintain consistency of design. In the logical architecture depicted in the figure, the report includes a data model and a layout, and the layout references two style templates in the catalog which in turn reference subtemplates.

In the Analytics Publisher logical architecture, the data model accesses data sources and the layout and its optional style template and subtemplates determine the formatting of the report output, which can include email, print, fax, or files, and others. The layout is designed using common office applications, for example Microsoft Word and Excel and Adobe Acrobat and Flash, among others.



How You Access and Modify Report Components

To create or edit reports, you must access the business intelligence (BI) catalog. In the catalog, objects of type Report represent the report definition, which includes report properties and layouts.

Data models are separate objects in the catalog, usually stored in subfolders called Data Models.

Accessing the BI Catalog

You can access the BI catalog in any of the following ways:

- In the Reports and Analytics work area, click **Browse Catalog** to open the BI catalog, and find your report or data model in the Folders pane.
- In the Reports and Analytics work area, find your report and select **More** to go to the report directly in the catalog. The data model associated with the report should be in the Data Models subfolder within the same folder as the report.
- Sign in to the application directly (for example: `http://host:port/analytics/saw.dll`) to open the catalog.
- Sign in to the Analytics Publisher server directly (for example: `http://hostname.com:7001/xmlpserver`) to open the catalog.
 - Alternatively, once you are in the catalog using another method, for example, through the Reports and Analytics work area, change the final node of the URL. For example, change (`http://host:port/analytics/saw.dll`) to `xmlpserver`. So the URL you use would be: `http://host:port/xmlpserver`.

Predefined Reports

A special Customize option is available only:

- For predefined reports, not data models.
- Through direct access to the server using the `/xmlpserver` URL. When you find your report in the BI catalog, select **Customize** from the **More** menu.

The Customize option automatically creates a copy of a predefined report and stores it in the **Shared Folders > Custom** folder within the catalog. The new report is linked to the original, so that when users open or schedule the original, they are actually using the copied version.

If you don't have access to the Customize option or don't want the original version linked to the new report, make a copy of the predefined report and save it in the Custom folder.

Predefined Data Models

Don't edit predefined data models. Instead, copy the data model into the Custom folder and edit the copy. You can't create a new data model based on the transactional tables.

Related Topics

- [Where to Save Analytics and Reports](#)
- [What happens to modified analytics and reports when a release update is applied?](#)

Reflect Changes from Edited Reports Sooner

When you use the Customize option to edit a predefined report, your changes won't be reflected until a refresh that happens every 24 hours. For changes to take effect sooner, use profile options to change the refresh interval.

The refresh applies your changes to Oracle Fusion Cloud Applications, but you can immediately see your changes in Microsoft Word and Oracle Analytics Publisher. For example, you download a predefined .rtf layout template and edit

the file in Word. You can see the modified output using the preview in Word. After you upload the .rtf file to the catalog, you can open the report in Analytics Publisher and see your changes. But, if you're accessing the report from Fusion Applications, you see the updated output only after the refresh.

When you're done configuring and testing reports, use the same profile options to turn the refresh back to every 24 hours. But even if you don't, the refresh automatically resets to 24 hours when it's been more than 8 hours since you set the profile options. The 24-hour refresh interval helps optimize performance.

Create Profile Options to Control the Refresh

Your profile options can apply to all workflow tasks, a product family, or a product. Based on the scope you want, your profile option must have a profile option code that follows a certain format.

Scope	Profile Option Code	Examples
Global	BIP_CLIENT_REFRESH_TIME	BIP_CLIENT_REFRESH_TIME
Product Family	BIP_CLIENT_REFRESH_TIME_<FAMILY>	- BIP_CLIENT_REFRESH_TIME_FIN - BIP_CLIENT_REFRESH_TIME_HCM - BIP_CLIENT_REFRESH_TIME_PRC - BIP_CLIENT_REFRESH_TIME_PRJ - BIP_CLIENT_REFRESH_TIME_SCM
Product	BIP_CLIENT_REFRESH_TIME_<FAMILY>_<PRODUCT>	- BIP_CLIENT_REFRESH_TIME_FIN_AP - BIP_CLIENT_REFRESH_TIME_HCM_PER - BIP_CLIENT_REFRESH_TIME_PRC_PON - BIP_CLIENT_REFRESH_TIME_PRJ_PJE - BIP_CLIENT_REFRESH_TIME_SCM_EGO

The profile options with a smaller scope take precedence. For example, you have profile option A with a global scope and profile option B with a product scope. If you're currently configuring notifications for a particular product, use profile option B to adjust the refresh time just for that product. But based on profile option A, the refresh is still at 24 hours for all other configurable notifications in all other products. Profile option B takes precedence over profile option A only for that one product.

Tip: To find the product family or product code, go to the Setup and Maintenance work area. Use the **Manage Taxonomy Hierarchy** task in the Application Extensions functional area for any offering. In the hierarchy, expand the root node and then the Oracle Fusion node. Find the row for the family or product and look in the **Module Key** column for the code.

Now you're ready to create your profile options!

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Profile Options** task in the Application Extensions functional area for your offering.
2. On the Manage Applications Core Profile Options page, click the **New** icon.
3. On the Create Profile Option page, enter the profile option code in the format that corresponds to the scope you want.
4. Enter a display name that you can easily remember to help you find the profile option later.

5. From the **Application** list, select **Oracle Middleware Extensions for Applications**.
6. From the **Module** list, select **Application Core**.
7. Specify a start date.
8. Click **Save and Close**.
9. On the Manage Applications Core Profile Options page, make sure that your new profile option is selected in the Search Results: Profile Options subsection.
10. In the <Profile Option>: Profile Option Levels subsection, select the **Enabled** and **Updatable** check boxes for the Site level.
11. Save your work.

Set the Refresh Interval

In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area. Set your profile option at the Site level and enter 15 or higher for the refresh interval in minutes. If you enter 15, your changes are reflected in Fusion Applications 15 minutes after they're saved in the BI catalog. For example, 15 minutes after you upload an edited .rtf layout template to the catalog, or after you update report properties in Analytics Publisher.

CAUTION: Make sure to enter a whole number.

When you're done making and testing your changes, set the profile option back to 1440, which is 24 hours in minutes. If you forget and leave your profile option as is for longer than 8 hours, don't worry! At that point, the profile option resets itself back to 1440 minutes.

Related Topics

- [How do I update existing setup data?](#)
- [Set Profile Option Values](#)
- [Modules in Application Taxonomy](#)

Where to Save Analytics and Reports

You save analyses, dashboards, and reports in the catalog, along with other objects like prompts and filters.

Besides the hierarchy of folders organized by product family, another important folder is Custom, found in Shared Folders. This is where you save the analytics and reports you create or edit for others to use.

Shared Folders and the Custom Subfolder

Anyone with the correct access can get to objects stored in Shared Folders. If you have the appropriate roles, you can save in Shared Folders so that your objects are available for other users. You should save objects in the Custom subfolder, and use the product family subfolders to organize and publish analytics and objects for the correct audiences.

Here are a few things to know while working with analytics in the catalog. Keep all modified analyses and reports in the Custom folder. Directly edit predefined analytics only when it's necessary to make sure that any references to the analysis or dashboard still work properly.

- Preserve modified predefined objects during updates, which can make changes to predefined analytics, reports, and other objects outside the Custom folder. You might lose changes saved outside the Custom folder during updates.

- You can easily find modified objects if they're not spread around the catalog.
- You can edit objects in the Custom folder without compromising security on the original objects.
- For predefined reports only, you can use a special **Customize** option to copy the report and also the folder structure and permissions. The copy is linked to the original, so editing the copy is like directly editing the original.

When you copy an object into the Custom folder, the copied object inherits the permission settings of the Custom folder. An administrator can reset the permissions on the object and the folder that it's in.

Note: When you create folders in the catalog, don't use special characters (~, !, #, \$, %, ^, &, *, +, `|, :, ", \\, <, >, ?, ,, /) in their names.

My Folders

My Folders is your personal storage; you're the only one who can access anything that you save there. What you save there is available in the Reports and Analytics work area, but not in My Folders in the Reports and Analytics panel tab on any other work area. But an exception is when you create an analysis using the wizard in the Reports and Analytics work area. If you save a wizard analysis in My Folders, it's available in any panel tab that appears in any work area.

Note: Don't store analyses or reports in the predefined Temp folder in My Folders. That folder is used by Analytics Publisher and purged automatically every 24 hours.

Create Folders

Create folders in Custom or My Folders.

To create folders:

1. In the catalog, navigate to the desired location of the new folder in the Folders pane.
2. In the catalog toolbar, click **New**, and select **Folder**.
3. In the New Folder dialog box, enter the folder name, and click **OK**.

Automatically Created Folders

If conflicts are detected during upgrade, folders named backup_nnn are automatically created in the catalog. After reviewing and resolving any conflicts, Oracle recommends that you manually delete the backup folders from the catalog. You can contact your help desk to request an automated removal if you have many folders to delete.

Related Topics

- [What happens to modified analytics and reports when a release update is applied?](#)

What happens to modified analytics and reports when a release update is applied?

Updates don't affect the Custom folder or My Folder in the catalog, anything saved there is preserved in updates.

This includes analytics and reports you edited or created. But anything saved outside those folders, in the predefined catalog, is preserved only if the update doesn't include a new version of those objects.

If an update includes a new version of a predefined object that you edited outside the Custom folder, the changes you made are saved as a new object. The new version from the update overwrites the existing predefined object. And a copy of the existing object (with your edits) is automatically created in the same folder, with a new name that indicates it's a new version.

If the update includes a new version of both the predefined object and a folder in its file path, the new folder name, along with the new version of the object, overwrites the existing predefined folder and object. And a copy of the existing folder (along with your edited object) is automatically created. The folder is renamed to indicate that it's a new version, but your edited object isn't renamed.

If folders named backup_nnn are automatically created in the catalog due to conflicts, after reviewing and resolving any conflicts, Oracle recommends that you manually delete the backup folders from the catalog. You can contact your help desk to request an automated removal if you have many folders to delete.

Note: Future updates won't affect renamed objects or anything within a renamed folder.

Work with Analyses and Reports

Create a Supplier Purchase Order Analysis

This example demonstrates how to create an analysis that shows details of the purchase orders for a specific supplier.

The following table summarizes key decisions for this scenario.

Decisions to Consider	In This Example
Which subject area to use?	Procurement - Purchasing Real Time
What columns to include?	Year, Business Unit, Supplier, Name, Payment Terms, Order, UOM, Line, Ordered Quantity, Purchase Order Distribution Amount
Which layout to use?	Table
Does the report need sections?	No
Does the report need highlighting?	Highlight ordered quantity above 1000 and below 20.

Create the Analysis

1. Navigate to the Reports and Analytics work area.
2. On the Create Analysis: Select Columns page, expand the Procurement - Purchasing Real Time folder.

3. Click **Create** and select **Analysis** if not already selected.
4. In the Select Subject Area window, select the Procurement - Purchasing Real Time subject area.
5. Expand the Time - Approved Date folder.
6. Select Year and click the **Add** button to move the column to the **Selected Columns** area.
7. Expand the Procurement BU folder.
8. Select Business Unit and move it to the **Selected Columns** area.
9. Expand the Supplier Profile folder.
10. Select Supplier and move it to the **Selected Columns** area.
11. Expand the Supplier Contact folder.
12. Select Name and move it to the **Selected Columns** area.
13. Expand the Payment Terms folder.
14. Select Payment Terms Name and move it to the **Selected Columns** area.
15. Expand the Purchase Order Header Detail folder.
16. Select Order and move it to the **Selected Columns** area.
17. Expand Purchase Order Lines, then expand the Purchase Order Line Detail folder.
18. Select UOM and move it to the **Selected Columns** area.
19. In the same folder select Line move it to the **Selected Columns** area.
20. Expand Purchase Order Lines, then expand the Purchase Order Line folder.
21. Select Ordered Quantity and move it to the **Selected Columns** area.
22. Expand Purchase Order Distributions, then expand the Purchase Order Distribution folder.
23. Select Purchase Order Distribution Amount and move it to the **Selected Columns** area.
24. Click **Next**.
25. On the Create Analysis: Select Views page, enter "Supplier Purchase Order Analysis" in the **Title** field.
26. Next to the **Table** field, click None to open the Table menu.
27. Select Table (recommended).
28. Check the box for **Preview**.
29. Click **Next**.
30. On the Create Analysis: Edit Table page, click **Next**.
31. On the Create Analysis: Edit Graph page, in the Sort region click **Add Sort**.
32. Select **Order**, then **Ascending**.
33. In the Filter region click **Add Filter**.
34. Select Supplier, then Allied Manufacturing in the Value column.
35. Click **Next**.
36. Open the choice list for **Add Column Format** and select Ordered Quantity.
37. Now enter 20 for the first Threshold and 1000 for the second Threshold.
38. Click **Next**.
39. On the Create Analysis: Save page, Save In region, enter "PO Details for Allied Manufacturing" in the Analysis Name field, enter a description, and then select **My Folders**.
40. Click **Submit**.
41. In the Confirmation window, click **OK**.
42. Expand My Folders to locate your analysis.
43. Select your report and click **View**.
44. Review your analysis.

Related Topics

How You Configure Purchasing Document Reports

You can copy and configure new versions of the delivered purchasing document report templates. Use the report creation capabilities of Oracle Analytics Publisher, and Oracle Analytics Publisher Desktop.

Aspects of copying and configuring delivered purchasing document report templates that are explained in this topic include:

- Report templates.
- How You obtain Procurement data source.
- Data models.
- General steps to copy and configure a report.

Report Templates

Two predefined purchasing document report templates are delivered: Purchase Order PDF Report and Purchase Agreement PDF Report.

The reports have two main elements:

- Procurement data source.
- Report layout template.

Obtain the delivered report templates in Oracle Analytics Publisher, using the following path: **Catalog/Shared Folders/Procurement**.

You can configure new versions of the delivered reports by adding fields to the report layout, to include reporting attributes not shown in the delivered versions, such as:

- Attributes from the delivered data model.
- Additional attributes from tables not available in the delivered data model.

How You Obtain Procurement Data Source

You can obtain the procurement data source (represented as an XML file) directly from Oracle Analytics Publisher.

There are two ways to extract the data source from Oracle Analytics Publisher:

- You can find the data models in the this path: Catalog > Shared Folders > Procurement > Purchasing > Data Models. There's a data model for purchase orders and a separate one for purchase agreements. You can export the data source from these data models by navigating to Edit > Data. Specify values for the parameters and then select View to see the XML. Use the Export button to save the XML.
- Alternatively, you can extract the data source from the provided reports. First, you must enable XML as an output parameter for the layout:
 - a. Navigate to Catalog > Shared Folders > Procurement > Purchasing, create a custom copy of the report you want to work with and then click **Edit** from the custom version you just created (placed in the Custom > Procurement > Purchasing folder by default).
 - b. Select View a list.
 - c. In the Output Formats dropdown, select Data (XML).
 - d. Open the report using either the Report Viewer (View Report button) or navigate to Open > Shared Folders > Custom > Procurement > Purchasing.

Note: To enable the View Report button, you must set the properties of the report to Run Report Online.

- e. Enter values for the parameters. When the results are displayed, navigate to Actions > Export > Data. You will be prompted to save the data source as an XML file.

Whether you use option 1 or option 2 to obtain the data source, you must provide values for these parameters to generate the corresponding XML file for purchase orders:

- Sold-to LE
- Document Number
- Change Order Number
- Is Document in Draft Status? (Y/N)

To extract sample data from the purchase agreement data model, you must provide values for these parameters:

- Procurement BU
- Document Number
- Change Order Number
- Is Document in Draft Status? (Y/N)

Data Models

Two data models are delivered, one for each purchasing document report: Purchase Order Data Model, and Purchase Agreement Data Model. Obtain them from Oracle Analytics Publisher, using the following path: **Catalog/Shared Folders/Procurement**.

Use the data models to:

- See all of the fields that can be included in a report.
- Retrieve fields from other tables that aren't included in the delivered data models.
- Make changes to the data models for the two purchasing document types independent of each other.

How You Copy and Configure a Purchasing Document Report

To copy and configure a purchasing document report follow these general steps.

1. Use Oracle Analytics Publisher to:
 - a. Obtain the delivered data model and report template appropriate to the purchasing document type.
 - b. Make a copy of them to configure into a new version, preserving the delivered versions unchanged.
 - c. Edit the data model and export the XML.
 - d. Download the report template.
2. Use Oracle Analytics Publisher Desktop, in Microsoft Word, to:
 - a. Import the data model to the copy of the report template.
 - b. Modify the report template to add fields to the report that aren't a part of the delivered report.
3. Use Oracle Analytics Publisher to:
 - a. Upload the modified report template to the catalog, making it available to other users.

The modified report template displays in the Configure Procurement Business Function task. You can find the task in the Setup and Maintenance work area, Procurement Foundation functional area. For each affected business unit, you can associate the modified report template with the appropriate purchasing document type.

Related Topics

- [Overview of Analytics Publisher](#)
- [Create and Edit Report Layouts](#)
- [Modify Data Models](#)
- [Purchasing Document Report](#)

6 Infolets

Overview of Infolets

An infolet is a small interactive widget that gives you key information and shows you what's going on in the areas you work on. You might also find something in an infolet that you need to follow up on.

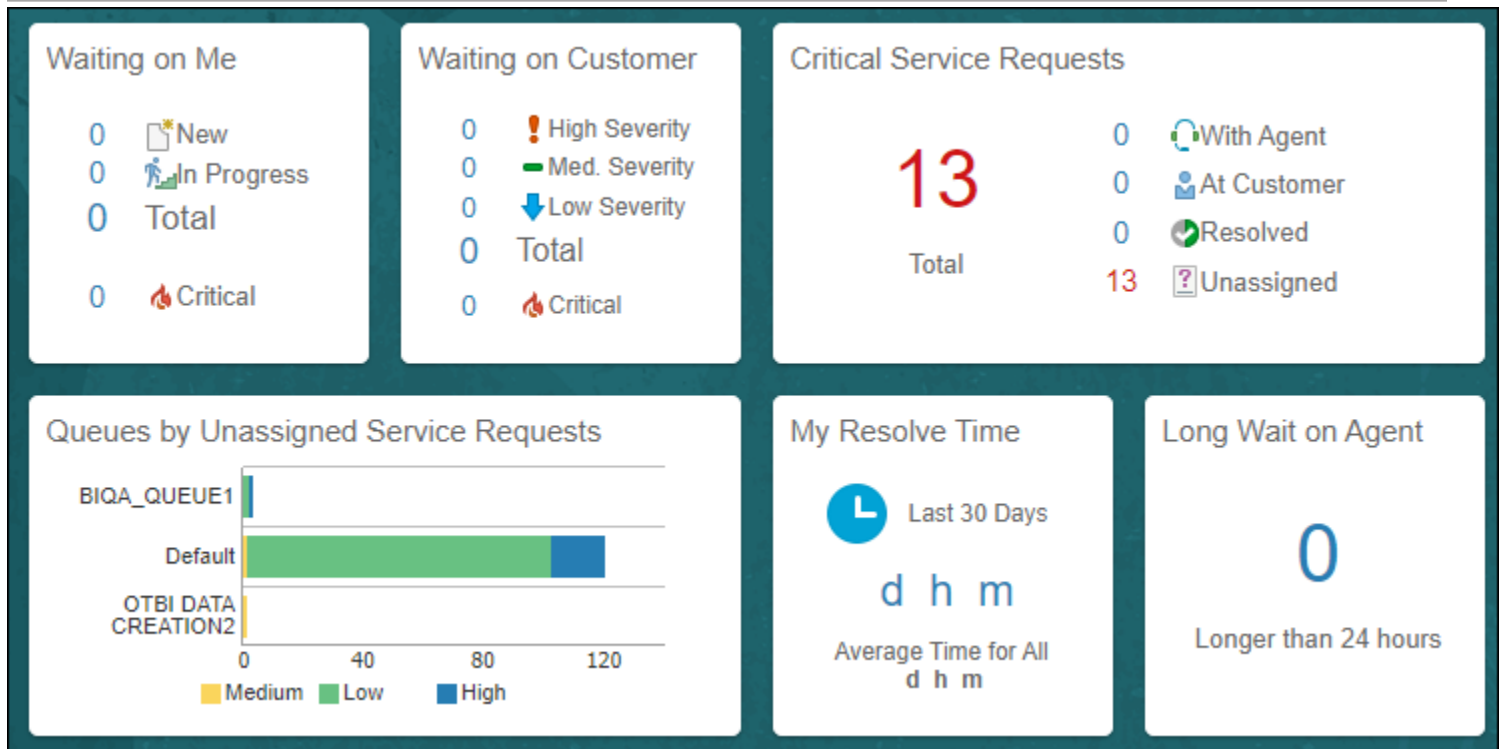
You can use infolets arranged in tabs in the Analytics section of your home page. If you're using a panel or banner layout, use the page control icons to use the infolets.

Here are a few things to know about infolets.

- Infolets have a front view, and might have a back and expanded view. Use the **Back View**, **Front View**, and **Expanded View** icons at the bottom corners of an infolet to open these views.
- Your current infolet view persists as the default view the next time you sign in. For example, if you viewed a back view of the infolet in your last session, you will see the same infolet view by default in your next session.
- Some infolets might also contain links to detailed reports. You can click anywhere in the infolet area to drill down to the detailed report.
- You can also personalize the infolets. For example, you can move or hide them on the infolets page.
- If you don't see infolet pages on your home page, then your administrators must have disabled them to show on the home page.

Note: Some SCM or Procurement Cloud infolets might function differently from other infolets.

Here's how an infolet page looks.



Personalize Infolets

You can personalize the infolets on your infolets page, such as you can edit their titles and views, move them, or hide or show specific infolets on the infolets page.

Edit Infolet Titles and Views

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Title and Views**.
2. Edit the infolet title, and enable or disable the infolet views.
3. Click **Save and Close**.

Reorder Infolets

You can change the position of an infolet within an infolet page.

1. Click the **Infolet Repository** icon, and select **Reorder Infolets**.
 2. In the Reorder Infolets dialog box, select the infolets, and use the arrows to reorder them.
- Tip:** To select multiple infolets, press the Ctrl key, and then select them.
3. Click **Apply**.

Hide or Show Infolets

To hide an infolet from an infolet page, click the **Infolet Repository** icon, and deselect the infolet from the list of infolets.

Tip: Alternatively, click the **Actions** icon on the top right corner of the infolet, and select **Hide**.

To show a hidden infolet on an infolet page, click the **Infolet Repository** icon, and select the infolet from the list of infolets.

Related Topics

- [Configure Infolet Display](#)

Configure Infolets

Overview of Configuring Infolets

You can configure infolets that aggregate key information for a specific area, for example, personal profile.

Your users use infolets arranged in tabs in the Analytics section of the home page. Or, if it's a home page with a panel or banner layout, they use the page control icons.

If your users don't find infolet pages on the home page, you can enable them by using the Home Configuration tab in the Structure work area. Let's look at some tasks you can do to configure infolets.

- Create infolets.
- Add content to infolets. For example, you can add a task flow or a performance tile report, and if an infolet contains a performance tile report, then you can add a link to a detailed report in the same infolet.

Note: In the context of infolets, a report is an analysis, not an Analytics Publisher report.

- Edit infolets. For example, edit infolet content and add, change, or remove link to detailed report.
- Delete infolets.

But before you start creating and editing infolets, here are a few things to keep in mind:

- You can add analyses from the catalog to an infolet, but not Analytics Publisher reports, or other objects like filters or prompts.
- To create or edit infolets, you must first either create and activate a sandbox, or activate an existing one. But make sure the sandbox has the Page Composer tool selected. If you want to make changes in a context layer that isn't the default layer, Site, you must create a separate sandbox just to use Page Composer in it. You can then change the context layer from Site to the other layer. For example, to create or edit infolets for a user with a specific job role, you must select the **Job Role** context layer.
- You can validate your changes in the sandbox in preview mode before you publish it.

Related Topics

- [Configure Infolet Display](#)
- [Best Practices for Using Page Composer in Sandboxes](#)

Create Infolets



Use infolet pages to create infolets. You can create an infolet, add content to it, and link detailed reports. For some product-specific infolet pages, you can't create infolets.

1. Activate a sandbox that has the Page Composer tool in it.
2. Open an infolet page.
3. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Edit Pages**.
4. Click the **Infolet Repository** icon, and select **Create Infolet**.

Note: If you can't find the **Create Infolet** menu item, it either means you can't create infolets for this page, or the theme may be using a global text and icon color that's too light, impacting the visibility of the UI element.

5. Enter a title for the infolet and set its views.
 - Specify the dimensions for the front view.
 - Enable or disable the back view.
 - Enable or disable the expanded view, and specify its dimensions. The dimensions of the front and the back views must be the same, but the expanded view must be bigger because it displays more details.
6. Click **Save and Close**. You can now add content to infolets.

Add Content to Infolets

You can add content to the infolet's front, back, or expanded view. You can't add a business intelligence dashboard to an infolet because a dashboard report is generally bigger than an infolet.

1. Select the infolet's view that you want to add content to.

Note: To open infolet's back view, click the **Back View** icon on the bottom right corner of the infolet. And to open expanded view, click the **Expanded View** icon on the bottom right corner of the infolet's back view.

2. Click **Add Content** on the infolet. You can find this button on any of the infolet's views, but only if you don't have any existing content in that view.
3. Search and select a performance tile or a task flow, and click **Add**. You can browse the business intelligence (BI) catalog to find the analytics and reports that you want to add.
4. Close the Add Content dialog box. You can now add detailed reports to the infolet.

Link Detailed Reports to Infolets

To provide detailed information about a subject matter on an infolet, you can add a link to a detailed report. After you add the link, your users can click anywhere in the infolet area to drill down to that detailed report. The detailed report doesn't replace the existing infolet content.

First, add a performance tile report to the infolet content, and then follow these steps:

1. Click the **Actions** icon on the top right corner of the infolet, and select **Link Detailed Report**.
2. On the Detailed Report page, click **Add Content**.
3. Search and select a report, and click **Add** to add it to the infolet.
4. Close the Add Content dialog box.
5. Click **Done**. You can now publish the sandbox.

Publish the Sandbox

1. Preview the infolet's front view, drill down to the detailed report, and then preview the back and the expanded views.
2. After you made changes, click **Close** to leave Page Composer.
3. Test your changes and publish the sandbox to make the new infolet available to your users.

Related Topics

- [Why don't I see infolets in the Analytics section of the home page?](#)
- [Overview of Sandboxes](#)
- [Create and Activate Sandboxes](#)
- [Best Practices for Using Page Composer in Sandboxes](#)
- [Why can't I see application changes made in previously published sandboxes in my current sandbox?](#)

Edit and Delete Infolets

On the infolet page, use the options available on each infolet to edit infolet content and delete infolets.

1. Activate a sandbox that has the Page Composer tool in it.
2. Open an infolet page.
3. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Edit Pages**.

Note: After you're done making changes, click **Close** to leave Page Composer, test your changes, and publish the sandbox.

Edit Infolet Content

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Content**.

Note: To edit the infolet content of the back or expanded view, open the view and use the **Actions** icon on that view.

2. Click **Add Content** to replace the existing content of the infolet.
3. Search and select a performance tile or a task flow, and click **Add**. You can browse the business intelligence (BI) catalog to find the analytics and reports that you want to add.
4. Close the Add Content dialog box.

Edit Title and Views

To edit title and views of an infolet, click the **Actions** icon on the top right corner of the infolet, and select **Edit Title and Views**.

Edit or Remove Detailed Report

You can edit or remove the detailed report.

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Detailed Report**.
2. On the Detailed Report page, you can edit or remove the detailed report.
 - To edit, click **Edit Report** and make changes to the detailed report.
 - To remove, click **Remove Report**.
3. Click **Done**.

Edit Infolet Visibility

You can show or hide an infolet on the infolet page. To edit the visibility settings of an infolet, do these steps:

1. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Visibility**.
2. Select one of these options:
 - **Yes**: The infolet appears on the infolet page.
 - **No**: The infolet doesn't appear on the infolet page.
 - **EL Expression**: The evaluation of the EL expression decides whether the infolet appears on the infolet page.

Delete Infolets

To delete an infolet, click the **Actions** icon on the top right corner of the infolet, and select **Delete**.

CAUTION: You can't easily retrieve an infolet once you delete it. But if you have accidentally deleted any infolet, don't worry. Contact My Oracle Support at <https://support.oracle.com>.

Related Topics

- [Overview of Sandboxes](#)
- [Create and Activate Sandboxes](#)

Examples of EL Expressions

You can use EL expressions to configure the visibility settings of various elements like groups, page entries, infolets, or announcements on the UI for users with specific roles.

For example, you can use EL expressions to show or hide a group or page entry on the Navigator and the home page, or show or hide an infolet or an announcement on the home page. The evaluation of the EL expression decides whether these elements are displayed for users with specific roles.

Scenario

This table shows examples of how you can use EL Expressions to show or hide specific UI elements for specific users.

Who can see the group or page entries	EL Expression and Example
Only users having any of the specific roles	<pre>#{securityContext.userInRole['<Role_Name>']}</pre> <pre>#{securityContext.userInRole['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB']}</pre>
Only users not having any of the specific roles	<pre>#{!(securityContext.userInRole['<Role_Name>'])}</pre> <pre>#{!(securityContext.userInRole['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB'])}</pre>
Only users having all of the specific roles	<pre>#{securityContext.userInAllRoles['<Role_Name>']}</pre> <pre>#{securityContext.userInAllRoles['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB']}</pre>
Only users not having all of the specific roles	<pre>#{!(securityContext.userInAllRoles['<Role_Name>'])}</pre> <pre>#{!(securityContext.userInAllRoles['CUSTOM_FND_APPLICATION_ADMINISTRATOR_JOB, CUSTOM_SVC_INTERNAL_HELP_DESK_MANAGER_JOB'])}</pre>

Here are a few things to keep in mind when you use EL expressions.

- Use an EL expression that can be evaluated from any page because the Navigator is used on all pages. So, don't use product-specific EL expressions.
- Don't include spaces or double quotes in EL expressions.
- Don't copy EL expressions from a word document and paste directly in the expression editor. Doing so might introduce hidden characters in your EL expression, causing formatting issues and unexpected action. Instead, use a text editor or manually type the EL expression in the editor.

Related Topics

- [Configure the Navigator and Page Entries on the Home Page for Navigation](#)
- [Create Roles in the Security Console](#)

FAQs for Infolets

Why don't I see infolets in the Analytics section of the home page?

That's probably because the infolet page is hidden.

Change the visibility setting of the infolet page using the Home Configuration page of the Structure work area. To open this page, click **Navigator** > **Configuration** > **Structure**, and then click the Home Configuration tab.

Related Topics

- [Configure Infolet Display](#)

How can I rename an icon for an infolet page in the page control on the home page?

You can rename an icon for an infolet page using the Home Configuration page of the Structure work area. To open this page, select **Configuration** > **Structure** from the Navigator menu, and then click the **Home Configuration** tab.

Related Topics

- [Configure Infolet Display](#)

What's the difference between a performance tile report and a detailed report added to the infolets content?

Performance tile report shows data in the small infolet format. When you add a performance tile report to an infolet, users can see only the summary information about the subject matter. But this report doesn't provide detailed information.

To provide detailed information about the subject matter on the same infolet, add a link to a detailed report. Users can click this link to gather more information.

7 Workflow Notifications

Configure Procurement Workflow Notifications

As part of certain business flows with workflow tasks, the application automatically sends email or in-application notifications to your users, or to people your users do business with.

For example, when a user submits a requisition, the approvers receive an email with the approval request. For some flows, configurable Oracle Analytics Publisher reports determine the email and in-application notification content and format. For some workflow tasks, you can enable these configurable notifications to be used instead of the standard notifications.

Procurement business flows with configurable notifications include the following workflow tasks:

- Negotiation invitation
- Purchase order approval
- Purchase order change order approval
- Requisition approval
- Requisition reapproval (change to lines by requester, change to lines by buyer)
- Seller negotiation award decision
- Seller negotiation bid disqualification
- Seller negotiation change schedule
- Seller negotiation invitation
- External Supplier Registration Approval Decision

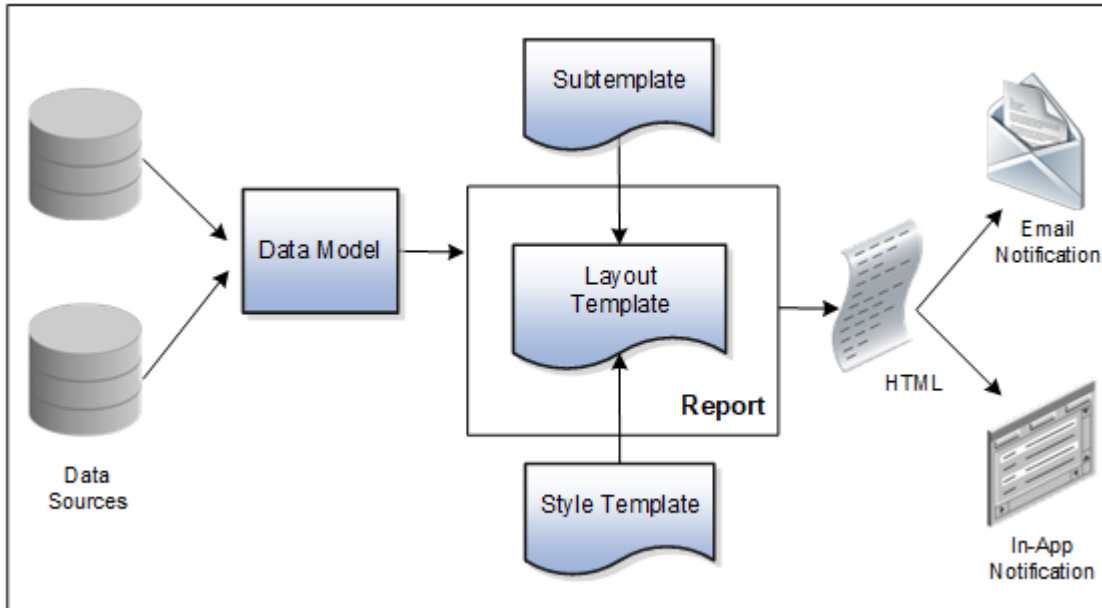
In addition to getting notifications in email, users can also view in-application notifications by:

- Clicking the **Notifications** icon in the global header and opening a notification.
- Going to the Worklist: Notifications and Approvals work area and opening a notification.
- Clicking the **In-App Notification** link at the end of an email notification.

Process Overview

The process to generate configurable email and in-application notifications is the same as generating other types of report output. The process involves various types of objects in the business intelligence catalog, including data models, subtemplates, style templates, and reports.

This figure shows how these objects work together to generate the output used for email and in-application notifications.



- **Data Source:** Stores the attributes and attribute values for business objects and transactions in the application
- **Data Model:** Determines which attributes from data sources are available to be included in the notification and how that data is retrieved
- **Subtemplate:** Provides common components, for example a branding logo and buttons, that can be reused in multiple reports
- **Style Template:** Provides styles, such as the type of lines and fonts to use in tables, or the font type, size, and color to use for headings
- **Report:** Contains a **layout template** that determines:
 - Which attributes appear in the notification, from the data model used for the report
 - What the notification looks like, using components from the subtemplate and styles from the style template used for the report
- **HTML:** Is the output generated from the report
- **Email Notification:** Is sent to users as part of a business flow, with the HTML output embedded in the email body
- **In-Application Notification:** Has the HTML output embedded in the application user interface

Each workflow task with configurable notifications has a corresponding predefined report in the BI catalog. For example, the Requisition Approval Email Report contains the Requisition Approval Email Layout and uses the Requisition Approval Email Data Model. The generated output is included in emails that are sent to users for requisition approval.

Notification Modifications

After you enable configurable workflow notifications, the predefined reports and related objects in the BI catalog work by default. The report-based notifications provide the same information as the standard notifications, but in a format optimized for mobile devices. To modify the notifications, you can edit copies of the predefined reports, data models,

and subtemplate (but not the style template). You proceed as you would to edit any report, data model, or subtemplate in the catalog, for example:

1. Find a predefined report for procurement in the BI catalog.
2. Use the **Customize** option to create a copy, or copy the report and paste it within the **Custom** folder.
3. Edit the copied report layout template.

Note: The configurable, report-based notifications are delivered in a format optimized for mobile devices. If your organization has approvers using mobile devices, minimize making modifications that increase the number of columns in tables, and test all such modifications thoroughly on applicable mobile devices before deploying the changes.

For more information about creating and editing reports, see the Oracle Fusion Cloud Procurement Creating and Administering Analytics and Reports for Procurement guide, available on the Oracle Help Center. You should get familiar with Oracle Analytics Publisher in general before modifying configurable notifications. Aspects specific to configurable notifications include:

- You use only the Template Builder for Word add-in to edit the .rtf template in Microsoft Word, not the layout editor or other tools available for creating and editing report layout.
- You usually edit a copy of predefined layout templates, rather than create reports or layout templates.

Security

To modify reports and data models for workflow notifications, you must have the BI Administrator related privileges.

Setup

If required, use the Offerings work area, Procurement offering to enable the configurable notifications feature.

- Configure Negotiation Invitation Notification with Oracle Analytics Publisher, found in the Sourcing functional area

Also, download and install the Template Builder for Word add-in.

For configurable email notifications, make sure that the email domain setup is correct in Oracle Analytics Publisher so that the emails get sent.

Note: Files attached to a notification by approvers during an approval flow aren't attached to the underlying document either for requisitions or purchase orders and therefore these attachments aren't accessible from the requisitions or purchasing documents user interface.

Related Topics

- [More About Oracle Transactional Business Intelligence Components](#)
- [Set Up for RTF and Excel Report Layout Templates](#)
- [Overview of Notifications and Approval Workflows](#)

Reflect Changes from Edited Reports Sooner

When you use the Customize option to edit a predefined report, your changes won't be reflected until a refresh that happens every 24 hours. For changes to take effect sooner, use profile options to change the refresh interval.

The refresh applies your changes to Oracle Fusion Cloud Applications, but you can immediately see your changes in Microsoft Word and Oracle Analytics Publisher. For example, you download a predefined .rtf layout template and edit the file in Word. You can see the modified output using the preview in Word. After you upload the .rtf file to the catalog, you can open the report in Analytics Publisher and see your changes. But, if you're accessing the report from Fusion Applications, you see the updated output only after the refresh.

When you're done configuring and testing reports, use the same profile options to turn the refresh back to every 24 hours. But even if you don't, the refresh automatically resets to 24 hours when it's been more than 8 hours since you set the profile options. The 24-hour refresh interval helps optimize performance.

Create Profile Options to Control the Refresh

Your profile options can apply to all workflow tasks, a product family, or a product. Based on the scope you want, your profile option must have a profile option code that follows a certain format.

Scope	Profile Option Code	Examples
Global	BIP_CLIENT_REFRESH_TIME	BIP_CLIENT_REFRESH_TIME
Product Family	BIP_CLIENT_REFRESH_TIME_<FAMILY>	- BIP_CLIENT_REFRESH_TIME_FIN - BIP_CLIENT_REFRESH_TIME_HCM - BIP_CLIENT_REFRESH_TIME_PRC - BIP_CLIENT_REFRESH_TIME_PRJ - BIP_CLIENT_REFRESH_TIME_SCM
Product	BIP_CLIENT_REFRESH_TIME_<FAMILY>_<PRODUCT>	- BIP_CLIENT_REFRESH_TIME_FIN_AP - BIP_CLIENT_REFRESH_TIME_HCM_PER - BIP_CLIENT_REFRESH_TIME_PRC_PON - BIP_CLIENT_REFRESH_TIME_PRJ_PJE - BIP_CLIENT_REFRESH_TIME_SCM_EGO

The profile options with a smaller scope take precedence. For example, you have profile option A with a global scope and profile option B with a product scope. If you're currently configuring notifications for a particular product, use profile option B to adjust the refresh time just for that product. But based on profile option A, the refresh is still at 24 hours for all other configurable notifications in all other products. Profile option B takes precedence over profile option A only for that one product.

Tip: To find the product family or product code, go to the Setup and Maintenance work area. Use the **Manage Taxonomy Hierarchy** task in the Application Extensions functional area for any offering. In the hierarchy, expand the root node and then the Oracle Fusion node. Find the row for the family or product and look in the **Module Key** column for the code.

Now you're ready to create your profile options!

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Profile Options** task in the Application Extensions functional area for your offering.
2. On the Manage Applications Core Profile Options page, click the **New** icon.
3. On the Create Profile Option page, enter the profile option code in the format that corresponds to the scope you want.
4. Enter a display name that you can easily remember to help you find the profile option later.
5. From the **Application** list, select **Oracle Middleware Extensions for Applications**.
6. From the **Module** list, select **Application Core**.
7. Specify a start date.
8. Click **Save and Close**.
9. On the Manage Applications Core Profile Options page, make sure that your new profile option is selected in the Search Results: Profile Options subsection.
10. In the <Profile Option>: Profile Option Levels subsection, select the **Enabled** and **Updatable** check boxes for the Site level.
11. Save your work.

Set the Refresh Interval

In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area. Set your profile option at the Site level and enter 15 or higher for the refresh interval in minutes. If you enter 15, your changes are reflected in Fusion Applications 15 minutes after they're saved in the BI catalog. For example, 15 minutes after you upload an edited .rtf layout template to the catalog, or after you update report properties in Analytics Publisher.

CAUTION: Make sure to enter a whole number.

When you're done making and testing your changes, set the profile option back to 1440, which is 24 hours in minutes. If you forget and leave your profile option as is for longer than 8 hours, don't worry! At that point, the profile option resets itself back to 1440 minutes.

Related Topics

- [How do I update existing setup data?](#)
- [Set Profile Option Values](#)
- [Modules in Application Taxonomy](#)

Best Practices for Content and Layout in Workflow Notifications

Here are some recommendations, tips, and reminders regarding the content and format of your configurable workflow notifications. Keep these in mind while you work on layout templates.

Follow the General Structure

In general, the workflow notifications contain a set of components that are displayed in a certain order. When you modify notifications, try to keep to this general structure and don't remove essential elements such as the action buttons.

The callouts in this figure identify the email notification components listed in the following table.

Task Approval

3,700.00 USD

Vision Corporation

Task Example

8/29/17

Approve

Reject

Request Information

Details

From

Emily Thorne

Description

Example of a task for approval

Task Information

Detail Line	Amount
1. Example A	2,200.00
Additional detail	
Additional Detail	1000183-2-1
Additional Detail	
Additional detail	8
2. Example B	1,000.00
3. Example C	500.00
Additional detail	
Total	3,700.00

Approvals

8/29/17 7:40 AM

Assigned to Mateo Lopez

8/29/17 7:40 AM

Submitted by Emily Thorne

Approve

Reject

Request Information

Transaction Details

In-App Notification

The callouts in this figure identify the in-app notification components listed in the following table. In addition to describing each component, the table also indicates if the component appears in the email notification, in-app notification, or both.

The screenshot shows a 'Task Approval' notification interface. At the top, there is a header bar with a green circle containing the number '1' next to a set of buttons: 'Edit', 'Actions' (with a dropdown arrow), 'Approve', and 'Reject'. Below this is a main content area with a green circle containing the number '2' next to the text 'Task Approval', '3,700.00 USD', 'Vision Corporation', 'Task Example', and '8/29/17'. Below this is a 'Details' section with a green circle containing the number '4' next to it. The 'Details' section includes 'From: Emily Thorne' and 'Description: Example of a task for approval'. Below this is a 'Task Information' table with columns 'Detail Line' and 'Amount'. The table has three rows: '1. Example A' with '2,200.00', '2. Example B' with '1,000.00', and '3. Example C' with '500.00'. A 'Total' row at the bottom shows '3,700.00'. There are also 'Additional detail' sections for each example line item.

Callout	Component	Notification Type
1	Buttons with the primary actions to take on the task, such as Approve and Reject . These buttons aren't part of the configurable, report-based notification content.	In-app
2	Notification header listing key attributes of the workflow task and the associated transaction.	Both
3	Buttons for the primary actions to take on the task, such as Approve and Reject .	Email
4	Notification body that usually includes transaction and line level details, displayed in tables or sets of attributes with corresponding values. The data model for the report restricts the total number of rows displayed in some of the tables. If the limit is exceeded, the table footer provides a link to the transaction details page, where users can view all the rows. To change this limit, you can edit a copy of the data model.	Both
5	Approval history, including any attachments that users in the history uploaded for the task. You can't edit the approval history component, which usually appears in the body of only email notifications. For in-app notifications, you can	Email (or both, in rare cases)

Callout	Component	Notification Type
	usually view the history by clicking the Actions button and selecting History .	
6	Buttons for the primary actions again.	Email
7	A link to the corresponding transaction page, and another link to the in-app notification.	Email

Keep Mobile in Mind

Because users can view the workflow notifications on mobile devices, always consider mobile first and keep the notifications as simple as possible. For example:

- Don't put too much content horizontally, such as too many columns in tables.
- Keep all text, including attributes and column headings, as short as possible.
- Center align lists of attributes and their values, if they appear outside tables.

Note: For workflow tasks with configurable notifications, make sure that the **Hide End User Web URL in notifications** check box is selected in BPM Worklist. If not, a default first line will appear in the emails, in addition to what comes from the report layout template. It's best to hide this additional content because it might cause emails to not render well, especially when viewed from mobile devices.

Make sure to test your email notifications on mobile devices. As part of your testing, confirm that the default line about accessing the task in the Workspace Application isn't showing up.

Related Topics

- [More Setup for Workflow Email Notifications](#)
- [Create RTF Templates Using the Template Builder for Word](#)

Add a Branding Logo and Change Other Shared Components in Workflow Notifications

A predefined subtemplate has common components for all workflow notifications based on predefined report layouts. You can edit these shared components so that the same changes apply to your notifications.

Here are some of the shared components in the subtemplate:

- Branding logo, if you add one to the subtemplate, which would appear as the first component in the email body. The logo appears in email notifications only.
- Action buttons in email notifications.
- Links at the end of the email notification, one to the corresponding transaction page, and another to the in-app notification.

For example, you can add a branding logo in the designated place in the subtemplate, or change the text on the buttons and links.

Note:

- When you make a copy of a predefined layout template to edit, the copy automatically inherits the same predefined subtemplate.
- Other than this central subtemplate for all notifications, you might also find predefined subtemplates specific to a product family. We talk about the central one here, but you would generally follow the same steps for other subtemplates.
- You must edit a copy of the subtemplate in the Custom folder of the BI catalog. Don't directly update the predefined subtemplate, including renaming it.
- When you work on your copy of the subtemplate, add your own content or edit what's already there, but don't remove anything.
- The exact steps can vary depending on your version of Microsoft Word.

Modify Shared Components in the Subtemplate

Here's how you edit a copy of the predefined subtemplate that has the shared components:

1. Click **Navigator > Tools > Reports and Analytics**.
2. Click the **Browse Catalog** icon.
3. In the catalog (the Folders pane), expand **Shared Folders > Common Content > Templates**.
4. For **Workflow Notification Subtemplate**, click **More** and select **Customize**.

If you're not using the Customize option, even though it's recommended:

- a. Click **Copy** in the toolbar with Workflow Notification Subtemplate selected.
 - b. In the catalog, expand **Shared Folders > Custom > Common Content > Templates**. Create a Templates folder in this location if it doesn't exist.
 - c. Click **Paste** in the toolbar.
5. In the catalog, with the Templates folder open under the Custom folder, click **More** for the subtemplate and select **Rename** to give it a new name.
 6. Click the **Edit** link for the renamed subtemplate.
 7. In the Templates section, click the link in the Locale column.
 8. Save the subtemplate .rtf file to your computer.
 9. Open the .rtf file with Microsoft Word.
 - To add a logo, insert your own image in the subtemplate.
 - To change button or link text, edit the text accordingly. Make the same edits wherever that button or link text appears in the subtemplate.

CAUTION: To make sure that your layout templates reflect these changes without more rework, don't edit any other text in the subtemplate .rtf file.

10. Update Word options so that existing links remain intact in the subtemplate.
 - a. Click **File > Options > Advanced**.
 - b. In the Word Options dialog box, click **Web Options** in the General section.
 - c. In the Web Options dialog box, open the Files tab.
 - d. Deselect the **Update links on save** check box.
11. Save your changes in Word.

Upload the Modified Subtemplate

Now you upload your subtemplate to the BI catalog:

1. In the catalog, expand **Shared Folders > Custom > Common Content > Templates**.
2. Click **Edit** for your subtemplate.
3. In the Templates section, click the **Upload** icon.
4. Select your modified .rtf subtemplate and a locale, and click **OK** to replace the original subtemplate.

Point Layout Templates to Your Subtemplate

Update all the report layout templates that you want to apply your subtemplate to:

1. In Microsoft Word, open the .rtf file for the layout template, as you would to make any other changes to the notification.
2. At the beginning of the document, change the subtemplate reference. For example, change `<?import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:xdoxsl:///Custom/Common Content/Templates/My Workflow Notification Subtemplate.xsb?>`.
3. Save your work.
4. Test things out to make sure you see your subtemplate changes in the notification output.

Related Topics

- [What is a subtemplate?](#)
- [Customize Pixel-Perfect Reports](#)

Use Quick Parts for Workflow Notifications

Use the Quick Parts feature in Microsoft Word to insert reusable pieces of formatted content. When you edit copies of predefined report layout templates for workflow notifications in Word, you can add predefined Quick Parts content to your .rtf file.

Quick Parts are helpful when you do more advanced work on layout templates. For example, from the Quick Parts gallery, you can select and add a table in a format that's consistent with predefined tables already on your notifications. The predefined Quick Parts content is available in a style template .dotx file on My Oracle Support.

Note: The exact steps can vary depending on your version of Microsoft Word.

Prerequisites

To get the predefined Quick Parts content into your Quick Parts gallery:

1. Open Quick Parts for Configurable Workflow Notifications (2215570.1) on My Oracle Support at <https://support.oracle.com>.
2. Download the .dotx file and save it to your Microsoft Word template folder, for example **C:\Users\<user name>\AppData\Roaming\Microsoft\Templates**. You need to save the .dotx file where the Normal.dotm Microsoft Word template is stored.

Also, to preview your layout template changes before uploading the .rtf file back to the BI catalog:

- Generate sample report data from the data model for the report that you're editing.
- Download a local copy of the subtemplate that applies to the layout template.

Adding Quick Parts Content to Workflow Notifications

To insert content from the Quick Parts gallery into a layout template:

1. In the BI catalog, find the predefined report with the layout template that you want to modify.
2. For the report, click **More** and select **Customize**.
If you're not using the Customize option:
 - a. Copy the predefined report and paste it in an appropriate subfolder within the Custom folder.
 - b. Click the **Edit** link for the copied report.
3. Click **Edit** for the layout template to insert Quick Parts content into, and save the .rtf file to your computer with a new file name.
4. Open the .rtf file with Microsoft Word.
5. Put your cursor where you want to insert new content.
6. From the Insert tab on the ribbon, click **Quick Parts** within the Text group, and select the component to insert.
7. Edit the inserted component as needed and add any other components.
8. Save your changes in Word.

Previewing the Layout Template Changes

To preview your edits before uploading your layout template to the BI catalog:

1. On the ribbon, open the Analytics Publisher tab and click **Sample XML** within the Load Data group to import sample data from the data model. Skip this step if you already loaded sample data.
2. At the beginning of the document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<?import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:///C:/Template_Directory/FinFunWorkflowNotificationSub.rtf?>`.
3. From the Analytics Publisher tab on the ribbon, click **HTML** in the Preview group.
4. If the preview reflects your changes as expected, then change the path back to the original location.
5. Save your changes in Word.

Uploading the Modified Layout Template

To upload your layout template to the BI catalog after previewing the changes:

1. Back in the catalog, click **Edit** for the report within the Custom folder, if that page isn't still open.

2. Click the **View a list** link.
3. Click the **Create** icon on the table toolbar.
4. In the Upload or Generate Layout section, click **Upload**.
5. Upload your edited .rtf file with a unique layout name.
6. Back on the page for editing the report, click Delete for the layout template that you downloaded earlier.
7. Click the **Save Report** icon.

Related Topics

- [Quick Parts for Configurable Workflow Notifications](#)
- [Understand Style Templates](#)
- [Test Data Models and Generate Sample Data](#)
- [Customize Pixel-Perfect Reports](#)

Set Up Content to Appear in Only Email or In-App Workflow Notifications

The same .rtf report layout template is used for both email and in-app notifications. When you edit a copy of predefined templates, you can make content conditional. For example, add an attribute and have it appear only in email notifications.

The logo, action buttons, and links at the end of email notifications are predefined to appear only in emails, based on the subtemplate. The approval history is usually predefined to also appear in the body of only email notifications. Any conditional setting you apply to these components in the .rtf template won't override the predefined setup.

Prerequisites

Generate sample report data from the data model used for the report, and save the .xml file to your computer.

Defining Conditional Regions

To define a conditional region of content that appears only in email or in-app notifications:

1. Open your .rtf report layout template in Microsoft Word.
2. On the ribbon, open the Analytics Publisher tab and click **Sample XML** within the Load Data group.
3. Select the .xml file you downloaded to import sample data from the data model.
4. In your .rtf document, select the content you want to make conditional.
5. On the ribbon, click **Conditional Region** within the Insert group.
6. In the Conditional Region dialog box, on the Properties tab, select **BINDISONLINENOTIF** from the **Data field** list in the General section. The values in this list come from the sample data you imported from the data model.
7. Select **Date/Text** from the next list.
8. In the Condition 1 section, select **Equal to** from the **Data field** list.
9. In the corresponding text field, enter **true** for content to appear only in in-app notifications, or **false** for content to appear only in emails.
10. Make sure that form fields containing the conditional logic are inserted around your selected content. The beginning form field, **c**, should be immediately before the conditional content, and the closing form field, **ec**, should be immediately after. Move the form fields as needed.

Tip: To make sure you're looking at the correct form fields, double-click the `c` form field to open the Conditional Region dialog box and see the `BINDISONLINENOTIF` setting.

11. Save your changes in Word.

Entering Conditional Code

If the data model for your report doesn't have the `BINDISONLINENOTIF` attribute, then:

1. In your .rtf report layout template, put your cursor immediately before the content you want to make conditional.
2. Enter the following code, which functions the same as the `c` form field:
 - `<?if:BINDISONLINENOTIF='true'?>` for in-app only
 - `<?if:BINDISONLINENOTIF='false'?>` for email only
3. Put your cursor immediately after your conditional content.
4. Enter `<?end if?>`, which functions the same as the `ec` form field.
5. Save your changes in Word.

Related Topics

- [Best Practices for Content and Layout in Workflow Notifications](#)
- [Add a Branding Logo and Change Other Shared Components in Workflow Notifications](#)
- [Test Data Models and Generate Sample Data](#)

Preview Changes and Upload Layout Templates for Workflow Notifications

Before uploading .rtf files for report layout templates to the BI catalog, preview the output with your changes in Microsoft Word. You can avoid uploading a broken report that displays an error in the notifications sent to users.

Note: The exact steps can vary depending on your version of Microsoft Word.

Before You Start

- Generate sample report data from the data model used for the report, and save the .xml file to your computer.
- Download a local copy of the subtemplate that applies to your own report layout template:
 - a. In the BI catalog, expand **Shared Folders > Custom > Common Content > Templates** if you're using a modified subtemplate, or **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - b. Click **Edit** for Workflow Notification Subtemplate.
 - c. In the Templates section, click the link in the Locale column.
 - d. Save the subtemplate .rtf file to your computer.

Preview Output

To generate sample output from a local layout template:

1. Open your .rtf report layout template in Microsoft Word and make your edits.
2. On the ribbon, open the Analytics Publisher tab and click **Sample XML** within the Load Data group.
3. Select the .xml file you downloaded to import sample data from the data model.
4. At the beginning of your .rtf document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<?import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:///C:/Template_Directory/FinFunWorkflowNotificationSub.rtf?>`.
5. From the Analytics Publisher tab on the ribbon, click **HTML** in the Preview group.
6. If the preview reflects your changes as expected, then change the path back to the original location.
7. From the Analytics Publisher tab on the ribbon, click **Validate Template** in the Tools group.
8. Also in the Tools group, click **Check Accessibility**.
9. Save your changes in Word.

Upload the Modified Layout Template

Here's how you upload your layout template to the BI catalog after previewing the changes:

1. Back in the catalog, click **Edit** for the report within the Custom folder, if that page isn't still open.
2. Click the **View a list** link.
3. Click the **Create** icon on the table toolbar.
4. In the Upload or Generate Layout section, click **Upload**.
5. Upload your edited .rtf file with a unique layout name.
6. Back on the page for editing the report, go back to the list view.
7. Select the **Default Layout** check box for your layout template. If you ever want to go back to the predefined layout, you can select it as default later.
8. Click the **Save Report** icon.

Related Topics

- [Best Practices for Content and Layout in Workflow Notifications](#)
- [Test Data Models and Generate Sample Data](#)

Reports and Data Models Used for Procurement Notifications Based on Reports

You can configure Oracle Analytics Publisher reports to send email and in-application notifications for some Oracle Fusion Cloud Procurement workflow tasks. Each business process area uses different Oracle Analytics Publisher reports and data models for configuring the email or in-application notifications.

Reports and Associated Data Models

This table shows the Oracle Analytics Publisher reports and associated data models that are available for configuring both email and in-application notifications for procurement business processes. The navigation to the business process folders is: **Oracle Analytics Publisher > Catalog > Shared Folders > Procurement** folder. Under this folder you can find the following business process folders having configurable notification reports and data models.

Business Process	Report	Data Model
Purchasing	Purchase Order Notification Report	Purchase Order Notification Data Model
Self Service Procurement	Requisition Approval Email Report	Requisition Approval Email Data Model
Sourcing	Negotiation Invitation Email Report	Sourcing Notifications Data Model
Sourcing	Seller Negotiation Award Decision Notification Report	Seller Negotiation Award Decision Notification Data Model
Sourcing	Seller Negotiation Bid Disqualification Notification Report	Seller Negotiation Bid Disqualification Data Model
Sourcing	Seller Negotiation Change Schedule Notification Report	Seller Negotiation Change Schedule Data Model
Sourcing	Seller Negotiation Invitation Notification Report	Seller Negotiation Invitation Data Model
Sourcing	Negotiation Award Decision Notification Report	Negotiation Award Decision Notification Data Model
Sourcing	Award Approval Notification Report	Award Approval Notification Data Model
Sourcing	Negotiation Approval Notification Report	Negotiation Approval Notification Data Model
Suppliers	External Supplier Registration Approved FYI Email Report	External Supplier Registration Approved Email Data Model
Suppliers	External Supplier Registration Rejected FYI Email Report	External Supplier Registration Rejected Email Data Model
Suppliers	External Supplier Registration Request To Resubmit Email Report	External Supplier Registration Email Data Model
Suppliers	External Supplier Registration Save for Later Email Report	External Supplier Registration Email Data Model

For each of these listed business process areas, you can use the associated reports and data models to configure both email and in-application notifications.

Configure Purchase Order Email Approval Notifications Using Reports

This example shows how to configure workflow email notifications for the purchase order approval business process using an Oracle Analytics Publisher report.

You use Microsoft Word to edit the RTF template used for notifications. You can modify the Oracle Analytics Publisher template only if you have the BI Administrator role.

In this scenario, you want purchase order approvers to see the notes to suppliers.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which report, data model and layout template do I update?	For updates to email notifications for purchase order approval: • Purchase Order Notification Report • Purchase Order Notification Data Model • Purchase Order Approval Layout
Do I want to add prompts and headers to the layout template?	No, not for this example.
Do I want to add data model attributes to the layout template?	Yes, the Note to Supplier attribute.
Which language do I use for the RTF template?	English (United States).

Summary of the Tasks

Configure a purchase order email approval notification to add an attribute by:

1. Adding an attribute to the data model.
2. Exporting the data model XML file.
3. Downloading the report layout template.
4. Adding data model attributes to the template.
5. Uploading the modified report layout to the Oracle Analytics Publisher catalog.

Prerequisites

1. Download and install the Oracle BI Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.
2. Download and install the Template Builder for Word to use Microsoft Word to edit the layout templates. To download, install, and set up Template Builder for Word, see Creating RTF Templates by Using BI Publisher

11g Template Builder for Word: <http://www.oracle.com/webfolder/technetwork/tutorials/obe/fmw/bi/bip/tb4word/tbwordbip.htm>.

3. To preview the configured templates, download a local copy of the subtemplate that applies to your own report layout template:
 - o Sign in to the Oracle Analytics Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
 - o Click **Catalog**.
 - o In the BI catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
 - o Click More for the Workflow Notification Subtemplate.
 - o Click the Download option.
 - o Save the subtemplate file to your computer.

Add an Attribute to the Data Model

In this task, you add the Note to Supplier attribute to the data model.

1. Sign in to the Oracle Analytics Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Procurement > Purchasing** and select **Data Models** to display the data models in the right pane.
4. Under Purchase Order Notification Data Model, click **More**, and then click **Copy**.
5. In the Folders section, expand **Shared Folders Custom Procurement Purchasing**.
6. Click the **Paste Resource** icon.
7. Under Purchase Order Notification Data Model click **Edit**.
8. On the **PurchasingNotificationDM** page, in the Data Model section, select **PurchaseOrderDraftLineDataSet**.
9. On the Diagram tab, click the **Edit Selected Data Set** icon.
10. On the Edit Data Set dialog, under SQL Query, after the line for the Category ID, add a line and enter:
`Line.NOTE_TO_VENDOR AS NoteToSupplier.`
11. Click **OK**.

Export the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required to add data model attributes to the template.

1. Sign in to the Oracle Analytics Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Procurement > Purchasing** to display the data models in the right pane.

4. Under Purchase Order Notification Data Model, click **Edit** to open the Diagram tab on the **PurchasingNotificationDM** page.

Note: To ensure that all data sets include requested elements with undefined values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

Note: To add data model attributes to the template, perform steps 5 and 6. Otherwise, skip to step 7.

5. Click the Data tab.
6. Enter values for the following key attributes for an existing purchase order. Key attributes enable you to pull in all the purchase order attributes:
 - **Document Number**
 - **Sold-to Legal Entity**
 - Change Order Number
7. Click **View** to see the sample data in the report, and all the available attributes. Verify the **Note to Supplier** attribute is in the list.
8. Click **Export**.
9. In the **Opening PurchasingNotificationDM** dialog box, select **Save File** and click **OK**.
10. Save the **PurchasingNotificationDM_.xml** file to a local drive.

Download the Report Layout Template

In this task, you create a copy of the report layout template in the Custom folder, and download a copy of the template to your local drive to modify it.

1. Sign in to the Oracle Analytics Publisher server with the BI Administrator role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Procurement > Purchasing** to display the templates in the right pane.
4. Under **Purchase Order Notification Report**, click **More**, and then select **Customize**. A copy of the Purchase Order Notification Report is created automatically in the Custom folder.
5. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Procurement > Purchasing**.
6. Under Purchase Order Notification Report, click **Edit**.
7. On the Purchase Order Notification Report page, next to Data Model, click the **Select Data Model** icon.
8. On the Select Data Model dialog, expand **Custom > Procurement > Purchasing**.
9. Select the **Purchase Order Notification Data Model**, and click **Open**.
10. Under **Purchase Order Approval Notification Layout**, click **Edit**.
11. On the **Opening PurchaseOrderApprovalNotificationLayout.rtf** dialog box, select **Save File** and click **OK** to save the document to your local drive. Save the template with the name **UpdatedPurchaseOrderApprovalNotificationLayout.rtf** to distinguish it from the original template.

Add Data Model Attributes to the Template

To modify the purchase order approval email notification, you edit a local copy of the RTF report layout template in Microsoft Word. In this task, you add the Note to Supplier data model attribute to the report template.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. On your local drive, open the UpdatedPurchaseOrderNotification.rtf template in Microsoft Word, with the Template Builder installed.
2. Select the BI Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **PurchasingNotificationDM.xml** file you saved in the Exporting the Data Model XML File task. Then click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.
6. Scroll to the **TSRHLines** section of the notification.
7. Place the cursor after the **C UnitPriceEC** line and press the Enter key.
8. On the new line, enter **Note to Supplier:**, and place the cursor at the end of the text you entered.
9. On the BI Publisher tab, in the Insert section, click the **123 Field** button.
10. On the Field dialog box, locate and select the **NoteToSupplier** attribute.
11. Click Insert.
12. Click **Close** to return to the UpdatedPurchaseOrderNotification.rtf template.
13. Save and close the document.
14. Before uploading the RTF files to the business intelligence (BI) catalog, you should preview the output with the changes you made. You can avoid uploading a broken report that displays an error in the emails sent to users.
15. Proceed to the task Uploading the Modified Report Layout to the Oracle BI Publisher Catalog.

Upload the Modified Report Layout to the Oracle BI Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Analytics Publisher server with the BI Administrator Role to open the Oracle Business Intelligence Home page.
2. Click **Catalog**
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Procurement > Purchasing**.
4. Under the **Purchase Order Notification Report**, click **Edit**.
5. On the Purchase Order Notification Report page, on the right side of the page, click **Add New Layout** to open the page with the Create Layout and Upload or Generate Layout sections.
6. In the Upload or Generate Layout section, click the **Upload** icon.
7. In the **Upload Template File** dialog box, in the **Layout Name** field, enter **Updated Purchase Order Notification Report**.
8. In the **Template File** field, browse for the modified **UpdatedPurchaseOrderNotificationLayout.rtf** template on your local drive, select the template, and click **Open**.
9. In the **Upload Template File** dialog box, from the **Type** list, select **RTF Template**.
10. From the **Locale** list, select **English (United States)**.
11. Click **Upload** to open the **Processing** dialog box and return to the Purchase Order Notification Report page.
12. On the right side of the page, click **View a list** to open the Layout page.
13. In the row for the **Updated Purchase Order Notification Report**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Best Practices for Content and Layout in Workflow Notifications](#)
- [Preview Changes and Upload Layout Templates for Workflow Notifications](#)
- [How You Modify Copies of Predefined Reports](#)

Configure Oracle Sourcing Notifications Using Reports

This example shows how to configure workflow email notifications for the Oracle Sourcing business process using Oracle Analytics Publisher reports. You use Microsoft Word to edit the .rtf template used for notifications.

The following table summarizes key decisions for this scenario.

Decisions to Consider	This Example
Which template do I update?	Negotiation Invitation Email Report
Do I want to add prompts and headers to the layout template?	Yes
Do I want to add data model attributes to the layout template?	BUYERCOMPANY
Which language do I use for the RTF template?	English

Summary of the Tasks

Configure the Negotiation Invitation Email Report by:

1. Add an Attribute to the Data Model.
2. Export the data model XML file.
3. Download the report layout template.
4. Edit email body information in the template.
5. Add data model attributes to the template.
6. Upload the modified report layout to the Oracle Analytics Publisher catalog.

Prerequisites

1. Download and install the Oracle Analytics Publisher Desktop: <http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html>.

The Template Builder for Microsoft is included in the Oracle Analytics Publisher.

2. To preview the configured templates, download a local copy of the subtemplate that applies to your own report layout template:

- a. In Oracle Analytics Publisher, click **Catalog**.
- b. In the Oracle Analytics Publisher catalog, go to **Shared Folders > Common Content > Templates** for the predefined subtemplate.
- c. Click **More** for the Workflow Notification Subtemplate and then click **Copy**.
- d. In the Folders section, expand **Shared Folders > Custom > Procurement > Sourcing**.
- e. Click the Paste Resource icon.
- f. Click **More** for the Workflow Notification Subtemplate and then click **Download**.
- g. Save the subtemplate to the local drive on your computer.

Add an Attribute to the Data Model

In this task, you add attributes to a data model.

1. Sign in to the Oracle Analytics Publisher server to open the Oracle Analytics Publisher Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Procurement > Sourcing**.
4. For **Negotiation Invitation Email Report**, click **More**, and then click **Customize**.
5. In the Negotiation Invitation Email Report, click the **Sourcing Notifications Data Model**.
6. On the **Diagram** tab, select the header to which you want to add an attribute and then click the **Edit Selected Data Set** icon.
7. Add the required attribute and click **OK**.

Export the Data Model XML File

In this task, you export the XML file that includes the data model attributes predefined for the notifications. Perform this task to enable previewing your modified template. This task is also required to add data model attributes to the template.

1. Sign in to the Oracle Analytics Publisher server to open the Oracle Analytics Publisher Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Procurement > Sourcing**.
4. For Negotiation Invitation Email Report, click **Edit**.
5. In the Negotiation Invitation Email Report, click the **Sourcing Notifications Data Model** to open the Diagram tab.

Note: To ensure that all data sets include requested elements with null values in the output XML data, do the following:

- In the Data Model section, select Properties.
- In the Properties section, select Include Empty Tags for Null Elements.
- In the Data Model section, select Data Sets.

6. Click the Data tab.
7. Click **View** to see the sample data in the report, and all the available attributes.
8. Click **Export** and select **Save File** and then click **OK**.
9. Save the **SourcingNotificationsDM_.xml** file to a local drive.

Download the Report Layout Template

In this task, from the Custom folder you download a copy of the template to your local drive to modify it.

1. Sign in to the Oracle Analytics Publisher server to open the Oracle Analytics Publisher Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Procurement > Sourcing**.
4. Select **Negotiation Invitation Email Report**, click **Edit**.
5. For Negotiation Invitation Email Body Layout, click **Edit**.
6. In the **NegotiationInvitationEMailBodyReport.rtf** dialog box, select **Save File** and then click **OK** to save the file with the name **UpdatedNegotiationInvitationEMailBodyLayout.rtf** to distinguish it from the original template.

Edit Email Body Information in the Template

To modify email content, you edit a local copy of the .rtf report layout templates in Microsoft Word.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedNegotiationInvitationEMailBodyLayout.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Scroll to the buyer name.
3. Place your cursor at the end of the BUYER_NAME and press enter.
4. Enter the attribute BUYERCOMPANY.
5. Save the document.

Add Data Model Attributes to the Template

In this task, you add to the report template attributes that exist in the predefined data model.

Note: The exact steps can vary depending on your version of Microsoft Word.

1. Open the UpdatedNegotiationInvitationEMailBodyLayout.rtf template in Microsoft Word with the Template Builder installed, if not already open.
2. Select the Oracle Analytics Publisher Publisher tab.
3. In the Load Data section, click **Sample XML**.
4. In the dialog box to select XML data that appears, browse to open the **SourcingNotificationsDm_.xml** file you saved in the Exporting the Data Model XML File task. Then click **Open**.
5. In the **Data loaded successfully** dialog box, click **OK**.
6. Add the required data model attributes.
7. Save and close the document.
8. Proceed to the task Uploading the Modified Report Layout to the Oracle Analytics Publisher Catalog.

Upload the Modified Report Layout to the Oracle Analytics Publisher Catalog

You must perform this task to use the modified report layout for notifications.

1. Sign in to the Oracle Analytics Publisher server to open the Oracle Analytics Publisher Home page.
2. Click **Catalog**.
3. On the Catalog page, in the Folders section, expand **Shared Folders > Custom > Procurement > Sourcing**.

4. For the **Negotiation Invitation Email Report**, click **Edit**.
5. For Negotiation Invitation Email Body Layout, click **Properties**.
6. For Templates, click the Upload icon.
7. In the **Template File** field, browse for the modified **UpdatedNegotiationInvitationEMailBodyLayout.rtf** template on your local drive, select the template, and click **Open**.
8. In the **Upload Template File** dialog box, from the **Template Type** list, select **RTF Template**.
9. From the **Locale** list, select **English**.
10. Click **OK** to open the **Processing** dialog box and return to the Negotiation Invitation Email Report Data Model page.
11. Click **Save**.
12. On the right side of the page, click **View a list** to open the Layout page.
13. In the row for the **UpdatedNegotiationInvitationEmailReport Template**, select the **Default Layout** check box.
14. On the right side of the page, click the **Save Report** icon.

Related Topics

- [Best Practices for Content and Layout in Workflow Notifications](#)
- [Preview Changes and Upload Layout Templates for Workflow Notifications](#)
- [How You Modify Copies of Predefined Reports](#)