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A Integrating with Oracle Data Relationship Management to Enable Custom Hierarchies

Preface

Oracle Business Intelligence Applications (Oracle BI Applications) is a comprehensive suite of prebuilt solutions that deliver pervasive intelligence across an organization, empowering users at all levels — from front line operational users to senior management — with the key information they need to maximize effectiveness. Intuitive and role-based, these solutions transform and integrate data from a range of enterprise sources and corporate data warehouses into actionable insight that enables more effective actions, decisions, and processes.

Oracle BI Applications is built on Oracle Analytics Server, a comprehensive BI and analytics platform, which comprises enterprise business intelligence tools and infrastructure, such as a scalable and efficient query and analysis server, an ad-hoc query and analysis tool, interactive dashboards, proactive intelligence and alerts, and an enterprise reporting engine.

Functional Setup Manager - Statement of Direction

Functional Setup Manager (FSM) has been desupported in the current release. Ignore the references to FSM that you might see in the online Help.

Audience

This document is intended for ETL administrators and developers who are responsible for setting up and configuring ETL for Oracle BI Applications.

Depending on their role, users access Oracle BI Applications Configuration Manager and Functional Setup Manager (FSM) to perform different tasks:

- Users with the BI Applications Administrator role perform system setup tasks such as managing the Oracle BI Applications instance and enabling Oracle BI Applications offerings.
- Users with the BI Applications Implementation Manager role also manage Oracle BI Applications offerings. In addition, they manage implementation projects and the backup and migration of setup data, when required.
- Users with the BI Applications Developer role access FSM to perform the functional setup tasks that are assigned to them.

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Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Related Documentation

See the Oracle BI Applications documentation library for the complete set of Oracle BI Applications documents.

Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1

Overview of Functional Configuration in Oracle BI Applications

Functional configuration in Oracle Business Intelligence Applications (Oracle BI Applications) includes setup and management of the environment and configuration of Offerings and Functional Areas.

> **Tip:**
>
> To get started quickly with functional configuration, follow the high-level steps in Roadmap for Functional Configuration.

This section helps in familiarizing yourself with the concepts, tools, and workflows related to Functional Setup Manager (FSM) and Oracle BI Applications Configuration Manager (Configuration Manager).

- Terminology
- Overview of Configuration Manager and Functional Setup Manager
- Getting Started With Configuration Manager
- About Users and Roles in Configuration Manager
- About the Main Task Areas in Configuration Manager
- About Functional Setup Tasks in FSM
- About Setup Objects in Configuration Manager
- About the Work Area in Configuration Manager

Terminology

Here's a brief description of the terminology that is used in the Oracle BI Applications context.

- Source Instance — The transactional system (that is, OLTP) that serves as the source of data for Oracle Business Analytics Warehouse. To read and analyze data from a source system, you must register it with Oracle BI Applications. You can do so by using Configuration Manager.
- BI Application Offering — A BI Application product that you have purchased, for example, Oracle Financial Analytics or Oracle Sales Analytics. To start using a BI Application Offering, you must first enable it in Configuration Manager.
- Functional Area — A component of a BI Application Offering. For example, the Oracle Human Resources Analytics Offering has Functional Areas: Workforce Effectiveness, Leave & Accrual, and Workforce Development. A Functional Area is the smallest unit that can be configured in a BI Application Offering.

Overview of Configuration Manager and Functional Setup Manager

Use these tools to perform functional configuration for Oracle BI Applications.

Configuration Manager

- Contains the setup objects for Oracle BI Applications.
- Provides an administrative user interface for setup and configuration tasks.
- Enables migration of setup data across environments.
- Recommended tool for ongoing administration and maintenance of functional setups.
- Enables a quick review of the setup values for troubleshooting.

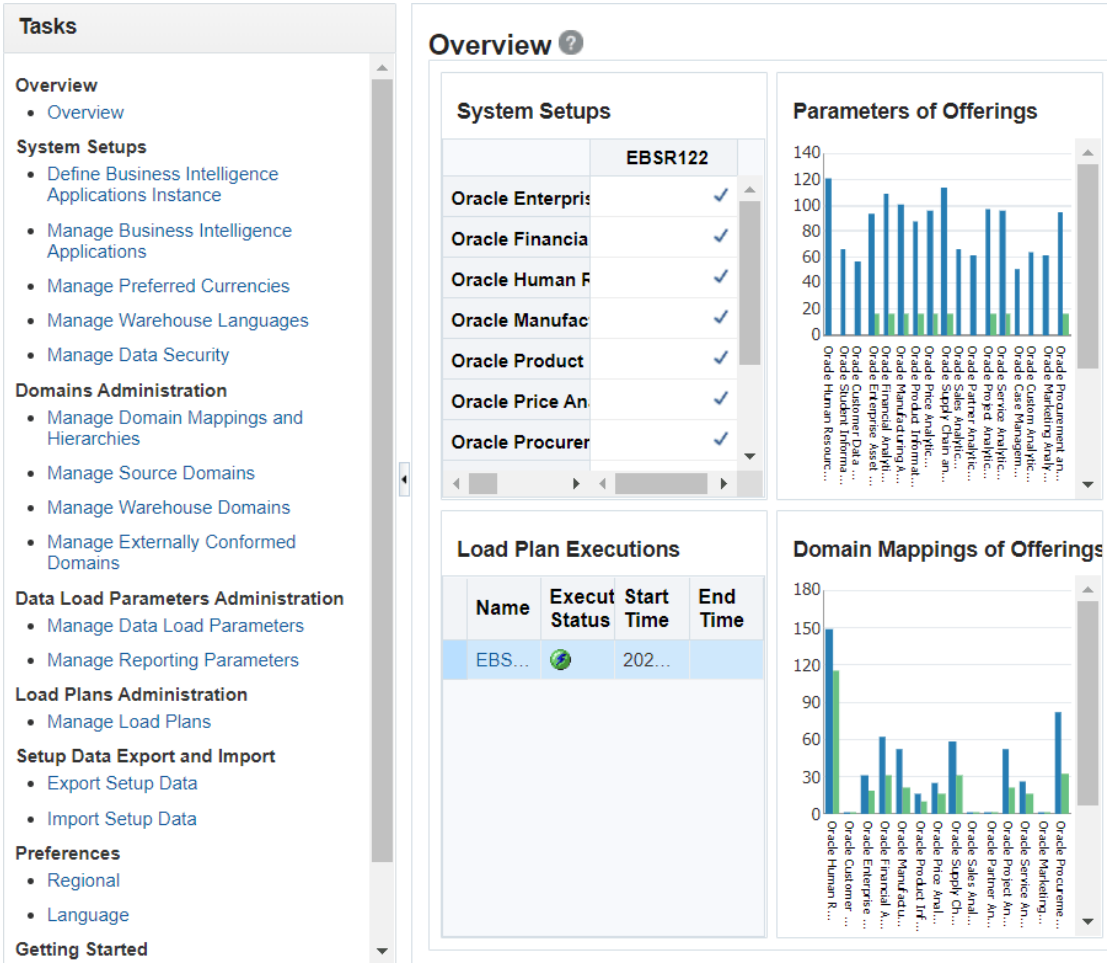
Functional Setup Manager (FSM) for Oracle BI Applications

- Used by Configuration Manager to provide a task-based implementation process, where an administrator is guided through a series of tasks to configure a Functional Area and manage its dependencies.
- Provides phased implementation capability.
- Launched from Configuration Manager to perform functional configurations.
- Recommended tool for initial implementation.
- Invokes Configuration Manager for setup tasks.
- (For Fusion Applications users) FSM for Oracle BI Applications is different from the Oracle Fusion Functional Setup Manager. FSM for Oracle BI Applications includes only features that are applicable for the Oracle BI Applications functional setup.

What is Configuration Manager?

Configuration Manager is a web application for setting up and maintaining an Oracle BI Applications environment.

For functional configuration, Configuration Manager works in conjunction with FSM, which provides guided tasks to configure Offerings and Functional Areas. See What is Functional Configuration?



Configuration Manager enables you to do the following:

- Launch FSM to configure Offerings and Functional Areas (for example, by specifying Domain Mappings, Data Load Parameters, and Reporting Parameters).

  FSM provides a list of guided tasks that enable you to configure Oracle BI Applications Modules and Functional Areas. For example, a functional developer may use a task named 'Configure Initial Extract Date' to set the value of INITIAL_EXTRACT_DATE to '2005-01-01'.

  See Performing Functional Configuration.

- Monitor and manage setup data, and extend Oracle Business Analytics Warehouse, where necessary.

  For example, a functional developer may have set the value of INITIAL_EXTRACT_DATE to '2005-01-01'. To change this value to '2006-01-01', you can edit the parameter in the Manage Data Load Parameters tab in Configuration Manager.

  See Roadmap for Setup Data Maintenance and Administration.

- Monitor and manage load plans that you use to perform ETL.

  See Overview of Load Plan Life Cycle in *Oracle Business Intelligence Applications ETL Guide*.

- Migrate configuration data across environments.

  See About Exporting and Importing Setup Data for Configuration Manager.

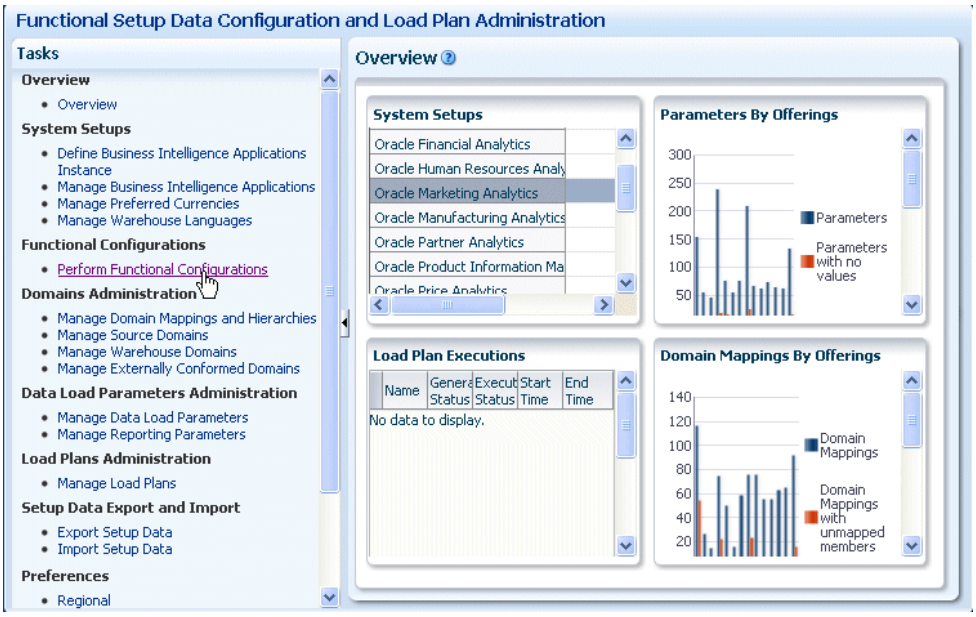
What is Functional Setup Manager?

Functional Setup Manager (FSM) for Oracle BI Applications enables you to configure and manage tasks for Offerings and Functional Areas. Examples of FSM tasks are 'Configure Initial Extract Date', and 'Configure Global Currencies'.

FSM is installed and deployed as part of Oracle BI Applications. In FSM, you select an Oracle BI Applications Offering and its Functional Areas for deployment, and then create an implementation project for that Offering. FSM generates a list of configuration tasks for the selected Offering and Functional Area(s). You can then assign these tasks to different functional developers, and monitor the status of the implementation project. The setup screens in FSM guide functional developers through all the tasks that must be performed.

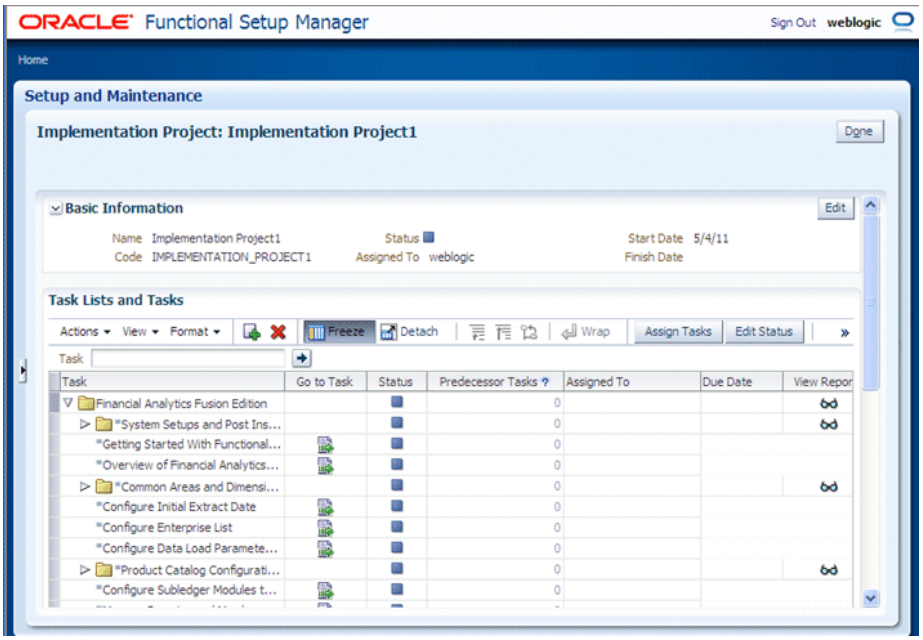
How to launch FSM

In Configuration Manager, select the **Perform Functional Configurations** link. When prompted, specify a user name with appropriate privileges for the tasks that you want to perform. For example, to create an Implementation Project and assign Tasks to Functional Developers, connect as a user with 'BI Applications Implementation Manager' privileges. See About Users and Roles in Configuration Manager.



When you launch FSM as a user with the Oracle BI Applications Administrator role or the BI Applications Implementation Manager role and open an Implementation Project, you see the functional tasks that relate to the Offering being deployed by that Implementation Project.

The following example screenshot shows the functional tasks for Oracle Financial Analytics.



Getting Started With Configuration Manager

To configure Offerings and Functional Areas, you must log in to Configuration Manager. To help administrators perform tasks easily, this tool includes User Assistance, Help, Documentation, and other resources.

- Logging In to Configuration Manager
- Viewing Help Content

Logging In to Configuration Manager

You use Configuration Manager to set up and manage several aspects of the Oracle BI Applications environment, and to manage and monitor functional configurations for Oracle BI Applications Offerings.

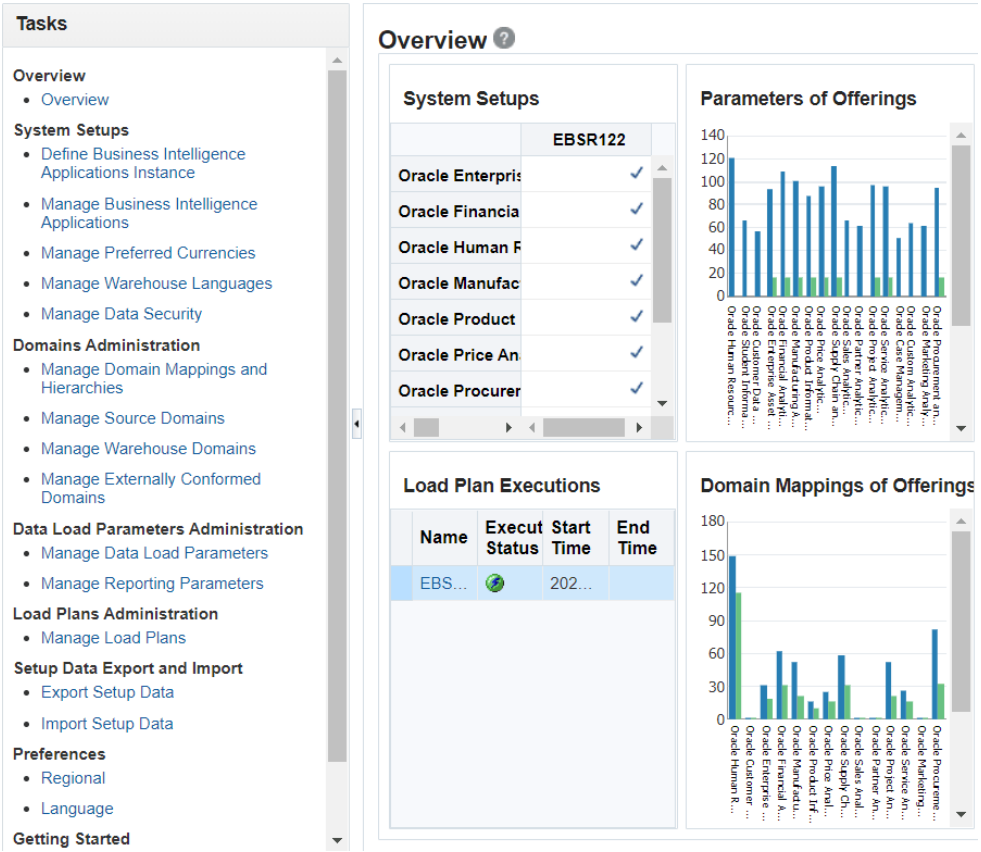
1. In a Web browser, open the Oracle BI Applications Configuration Manager link that is provided by your system administrator.

   For example:

   ```
   http://examplecompany.com:7001/biacm/
   ```

2. In the Sign In dialog, log in with your user credentials to display the main Oracle BI Applications Configuration Manager page.

   If you cannot access Configuration Manager, contact your security administrator to check whether your user account is associated with the appropriate duty role. See About Users and Roles in Configuration Manager.



- To navigate the application, use the Tasks bar on the left-hand side of the Welcome page.

  The options that are displayed in the Tasks bar are dependent on the privileges that your role is granted.

- To display Help for the Overview page, click **Help**, then **Configuration Manager Help**. You can also display context-sensitive Help for a dialog by

clicking the question mark icon displayed next to the dialog name or field name.

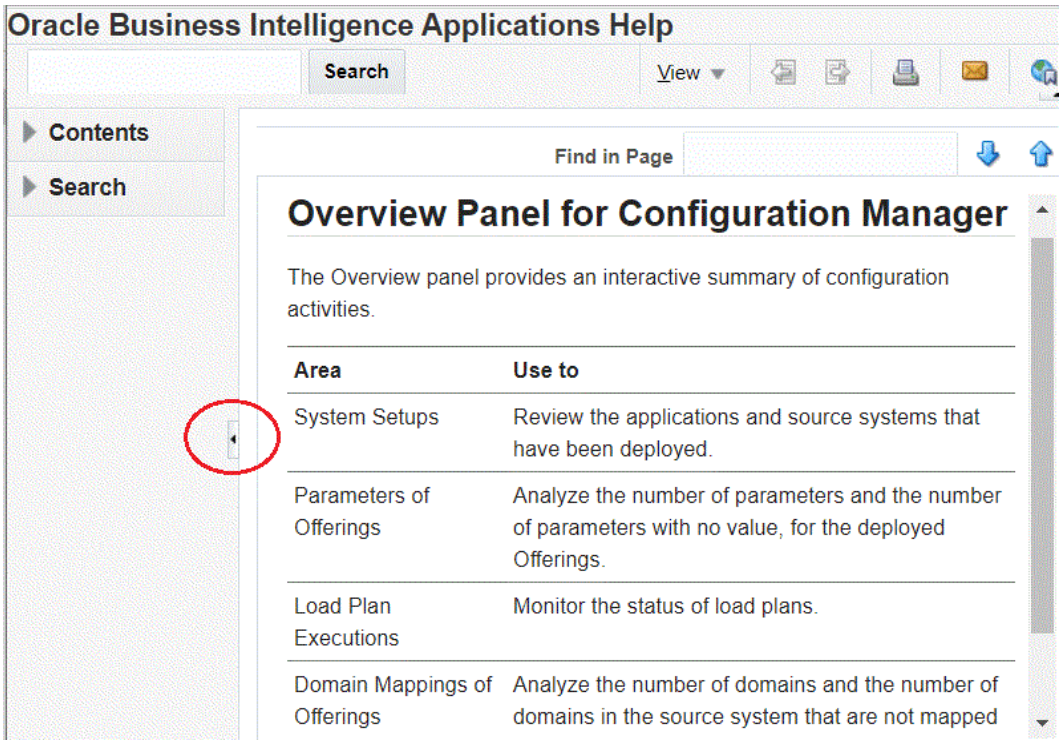
- To log out of Configuration Manager, click the drop-down menu next to your name at the top right corner of the page, then click the **Sign Out**.

Viewing Help Content

Configuration Manager provides Help and User Assistance features.

- Context-sensitive Help - Click the **Help** icon on any dialog to view context-sensitive Help for that dialog. When the context-sensitive Help is displayed, use the Table of Contents, Index, and Search facilities to locate User Assistance on other areas of the product.

> **Tip:**
>
> To maximize the text pane in the Help window, choose Maximize Reading Pane from the View menu. Alternatively, use the Collapse Pane arrow (shown in the screenshot) to hide the left hand tabs, or use the vertical sizing bar (above the Collapse Pane arrow) to reduce the width of the tabs.



- Inline Help, such as mouse-over tool-tips - Hold the cursor over an object to view a tool-tip for that object.

> **Tip:**
>
> For convenience, the same help content that is available in the UI is also available as a guide: *Oracle Business Intelligence Applications Functional Configuration Reference*.

About Users and Roles in Configuration Manager

To access Configuration Manager or FSM, you must log in as a user with one of these Duty Roles:

- BI Applications Administrator

  Users with the BI Applications Administrator Duty Role have access to all Configuration Manager screens and all FSM screens. Only users with this Duty Role can perform system setup tasks such as managing the Oracle BI Applications instance and enabling Oracle BI Applications offerings.

- BI Applications Developer

  Users with the BI Applications Functional Developer Duty Role have access to all Configuration Manager screens except for the System Setup screens. In FSM, these users have access to the list of functional setup tasks assigned to them, and they can perform functional setup tasks (by using the **Go to Task** option in FSM).

- BI Applications Implementation Manager

  Users with the BI Applications Implementation Manager Duty Role have access to the Oracle BI Applications Configuration Manager Overview page and dialogs for the export and import of Setup Data. In FSM, these users have access to the Configure Offerings and Manage Implementation Projects screens, but they cannot perform functional setup tasks. That is, they do not have access to the **Go to Task** option in FSM.

Setting up users with these Duty Role privileges is performed when Oracle BI Applications is set up. To set up user access, see User Access to Configuration Manager, FSM, and Oracle Data Integrator in *Oracle Business Intelligence Applications Installation Guide*.

To find out what Duty Role privileges have been assigned to the different users, use your LDAP tools and Oracle APM and check which users have the Duty Role privileges BIA_ADMINISTRATOR_DUTY, BIA_IMPLEMENTATION_MANAGER_DUTY, and BIA_FUNCTIONAL_DEVELOPER_DUTY. See Configuration Manager Permissions Reference in *Oracle Business Intelligence Applications Security Guide*.

About Setup Objects in Configuration Manager

Configuration Manager data includes these Setup objects.

- Data Load Parameters — used to control the nature of data loaded from the transactional system into the Oracle Business Analytics Warehouse. Examples: INITIAL_EXTRACT_DATE, TIME_GRAIN.
- Domain Mappings and Member Mappings — used to map a Source column List of Values to a Warehouse column List of Values. Example: Domain Maps for the Employee Dimension: COUNTRY -> W_COUNTRY.
- Reporting Parameters — correspond to Dynamic Repository Variables in the repository and allow these variables to be set using Configuration Manager. Example: FSCM_MASTER_ORG.

About the Main Task Areas in Configuration Manager

Configuration Manager has these main task areas:

- System Setups — Includes options to set up Source Systems, Target Databases, Warehouse Languages and so on.
- Functional Configuration — Includes the **Perform Functional Configurations** link, which you can use to invoke FSM to perform Functional Configuration.
- Setup Data Maintenance and Administration — Includes options to monitor the configuration settings that your Functional Developers have made using FSM, and to make changes where required. For example, a Functional Developer may have used a Task in FSM to set the value of INITIAL_EXTRACT_DATE to '2005-01-01'. If you want to change this value to '2007-01-01', you can use the Manage Data Load Parameters tab in Configuration Manager to edit the value directly, instead of reassigning the Task in FSM.
- Export and Import Configuration — Includes options to back up your setup data and migrate it to a separate environment.

About Functional Setup Tasks in FSM

FSM has four types of Functional Setup Tasks.

- Tasks to configure Data Load Parameters. For example, the task ‘Configure Initial Extract Date’ displays Data Load Parameter INITIAL_EXTRACT_DATE.
- Tasks to manage Domains and Mappings. For example, the task ‘Manage Domains and Member Mappings for Employee Dimension’ displays Domain Maps for the Employee Dimension.
- Tasks to configure Reporting Parameters. For example, the task ‘Configure Reporting Parameters for Master Organization’ displays Reporting Parameter FSCM_MASTER_ORG.
- Tasks that provide information. These tasks may be:
  - A set of instructions for editing components using tools other than Configuration Manager. For example, to configure the BI Metadata Repository, you use Oracle Business Intelligence Administration Tool. The names of these Tasks are prefixed with ‘How To’.
  - Conceptual, overview or supporting information. For example, the task ‘Overview of Financial Analytics’ provides information about Functional Areas in this offering.

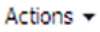
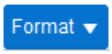
About the Work Area in Configuration Manager

Configuration Manager has a main Tasks bar and a Functional Configuration work area for Domains and Mappings.

To set accessibility preferences, click the Accessibility link in the top right hand corner to display the Enable Accessibility Preferences dialog. For example, you might want to display high contrast colors, or use large fonts.

Configuration Manager Menu Options Reference

Configuration Manager uses these menus and options.

Icon or Menu Option	Description
	**Actions** Use the Actions menu to display a list of available options for the currently selected object. For example, common actions are Enable, Disable, Add, and Edit.
	View Use the View menu to select which columns to view, and re-order columns.
	**Format** Use the Format menu to either resize the selected column or to wrap the content in the selected column.
	Freeze Use the Freeze icon to ensure that the selected column is fixed in its position and is visible even when you scroll the table horizontally.
	Detach Use the Detach icon to view a table tab in a separate larger pane. * For example, use this option to view data in wide columns more easily. To re-attach a separated pane, click Detach again.
	Wrap Use the Wrap icon to wrap the content in the selected column. When a column has a lot of content, by default only a part of it is displayed in the table. The Wrap option enables you to view the entire text in the column.

> **Note:**
>
> *If you are editing a master-detail table, the Detach option does not detach the master-detail relationship.

Configuration Manager Icons Reference

Configuration Manager uses icons to provide quick access to the most popular functions.

Icon or Menu Option	Description
	Add Use the **Add** icon (or plus sign +) to add an object. For example, click the **Add** icon on the Define Oracle BI Applications Instance - Source Systems tab to add a new Source System.
	Set parameter value before full data load This icon indicates that the value of a Data Load Parameter must be set before you perform a full load of data from the source instance to Oracle Business Analytics Warehouse.
	Edit Use the **Edit** icon (or pencil symbol) to edit the object that is currently selected in the table. For example, click the **Edit** icon on the Define Oracle BI Applications Instance - Source Systems tab to edit the currently selected Source System details. Alternatively, click on the value in the Parameter Value column to edit the value.
	Global Parameter This icon indicates that the parameter is global (that is, it applies to all (or a majority of) ETL tasks).
	Go To Top Use this icon to display the all nodes in the domain hierarchy.
	Go Up Use this icon to display the next highest level of nodes in the domain hierarchy.
	Overridable Parameter This icon indicates an overridable Application Specific parameter. An Overridable parameter icon indicates that each associated Fact Group or Dimension Group can have a different value.

Icon or Menu Option	Description
	Parameter This icon denotes a parameter. For Data Load Parameters, if displayed in the Data Load Parameters pane (or top list), then this icon indicates an Application Specific parameter. If displayed in the Group Specific Parameter Values For pane (or lower list), then this icon indicates a Non-Overridable Application Specific parameter, which means that each associated Fact Group or Dimension Group must have the same value. In other words, if you change the value for one Fact Group or Dimension Group, then all Fact Groups and Dimension Groups are updated with that value (if you first confirm at a Warning dialog).
	Show as Top Use this icon to display only the currently selected parent node and child nodes. *
	Read Only Parameter This icon indicates that a Data Load Parameter value is read-only, which means that you cannot change that parameter value on the Manage Data Load Parameter dialog.
	Parameter Category This icon denotes a grouping of related parameters, for example, the Configure Time Dimension category is a group of parameters that are related to calendars. To expand a Parameter Category, click Expand: To collapse a Parameter Category, click Collapse:

Icon or Menu Option	Description
	Query By Example Use the **Query By Example** icon to toggle the display of the Query By Example fields above each display column. When Query By Example fields are displayed, enter a value into a Query By Example field and press **[Enter]** to search for records that match that value. To clear a query, clear the text in the Query By Example field and press **[Enter]** again. For example, to search for parameters with names beginning with Global, type Global in the query box above a Name column, then press **[Enter]**. To clear the query, clear the text 'Global' from the query box above the Name column, then press **[Enter]**. See Searching for Parameters Values Using Query By Example.
	Select Date Use the **Select Date** icon to toggle the Calendar pane, which enables you to select a date. For example, on the Export Setup Data tab, select January 1 2010 to display only files that were exported on that day.
	Start Search Use the **Start Search** icon to display parameters matching the value or wildcard specified in the adjacent text box.

> **Note:**
>
> *This icon is only active for child nodes.

> **Tip:**
>
> To see a tool tip for an icon, mouse-over the icon.

About Sorting Items

To change the sort order of displayed items, click on or mouse-over the field name on which you want to sort, then click the up arrow or down arrow that is displayed in the field label.

Sort options are only displayed on mouse-over or when a field label or column is selected. For example, to display domain names in descending alphabetical order, you might click on the **Name** field label and click the down (or Sort Descending) arrow.

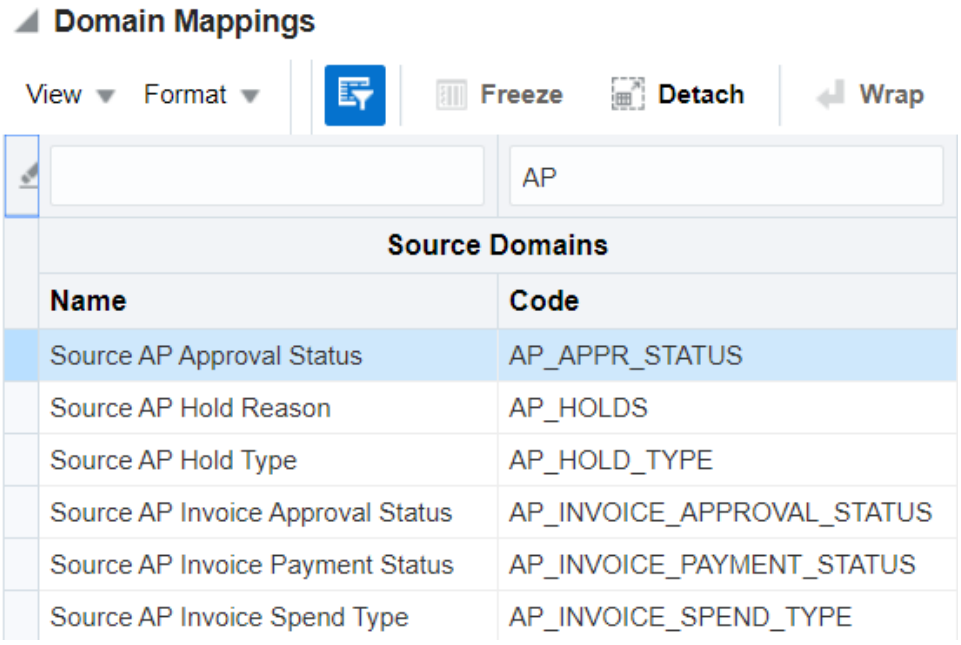
Searching for Parameters Values Using Query By Example

Query By Example enables you to locate parameter values using a free-text search.

1. If the Query By Example fields are not displayed, click the **Query By Example** icon.

2. Enter a value into each Query By Example field on which you want to search.

   For example, to search for domains with a code beginning with 'AP', type AP into the box above the **Code** column.



3. Press **Enter** to start the query.
4. To clear a query, clear the text in the Query By Example field and press **Enter** again.

2

Performing Functional Configuration

This section explains how to perform functional configuration for Oracle Business Intelligence Applications (Oracle BI Applications).

The following concepts are covered in this topic:

- What is Functional Configuration?
- Roadmap for Functional Configuration
- Enabling Offerings in FSM
- Creating an Implementation Project and Selecting Offerings
- Additional Steps for Managing Projects in FSM
- Performing Additional Functional Configuration Tasks

What is Functional Configuration?

Accurate and successful movement of data from source database to target Oracle Business Analytics Warehouse requires several functional setups of Oracle BI Applications Offerings to be performed. These functional setups, based on either business requirements or on transactional source system settings or configurations, direct the manner in which relevant data is moved and transformed from source database to target database.

Additionally, some functional setups of Oracle BI Applications control the manner in which data is displayed. Functional setups are also called functional configurations. See Roadmap for Functional Configuration.

About Starting ETL After Functional Configuration

After all Tasks have been completed in FSM, use the ETL and Additional Information for <*Offering*>Informational Task (if available) to determine the Load Plan details that you must specify to perform ETL for that Offering. The ETL and Additional Information for <*Offering*> Informational Task specifies Subject Areas that you must include in the Load Plan, and other ETL requirements.

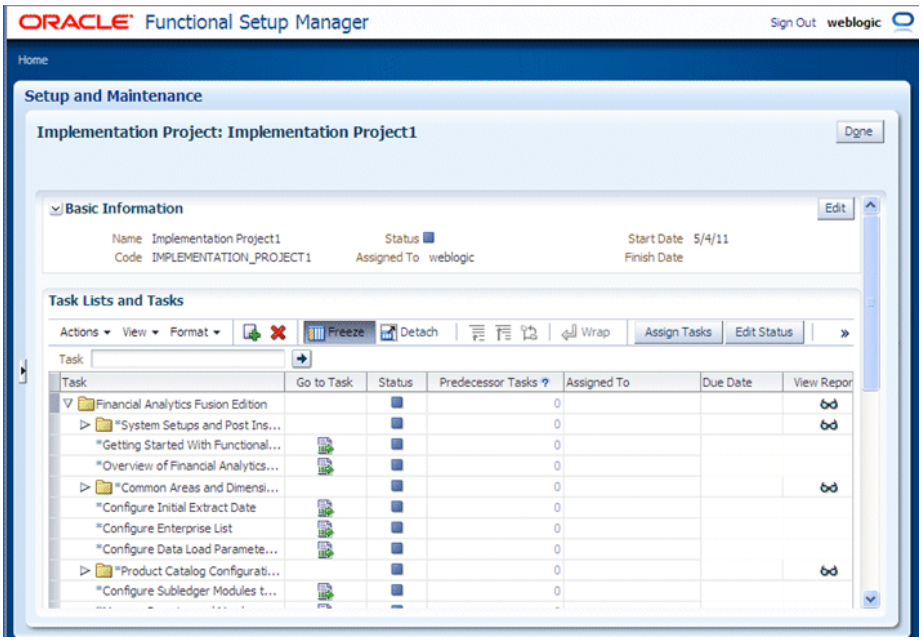
About Administrator Passwords

When you launch FSM from Oracle BI Applications Configuration Manager (Configuration Manager), you log into FSM using the same user name and password that you used to log into Configuration Manager.

About Task Lists and Tasks for Oracle BI Applications Offerings

When you navigate to an Implementation Project in Functional Setup Manager (FSM), you see the Tasks related to the Offering specified for that Implementation Project.

The example screenshot shows the Functional Tasks for Oracle Financial Analytics.



To know the types of functional tasks, see About Functional Setup Tasks in FSM.

The following Task Lists and Tasks are available for Oracle BI Applications:

- Getting Started with <*Offering*> — Each offering has this informational task, which provides an overview of that offering, and any other information that you need to begin configuration.
- ETL and Additional Information for <*Offering*> — Each offering has this informational task, which lists functional areas, and other useful information about configuring the offering.
- System Setup and Post-Install Setup — This task must be completed once per Oracle BI Applications deployment by the System Administrator before Functional Configuration can begin on any offering, and includes all mandatory post-installation steps for Oracle BI Applications.
- Common Areas and Dimensions — This task list includes tasks that are common to multiple offerings. To perform the common tasks, see About Completing Tasks in the Common Areas and Dimensions Configurations Task List.
- <*Offering specific Tasks*> — For a full list of functional tasks for each offering, use the task list and task reports that are available in FSM.

Roadmap for Functional Configuration

Configure Oracle BI Applications by following this high-level roadmap.

To launch FSM, click the **Perform Functional Configurations** link in Configuration Manager. If Single Sign-On has not been configured between Configuration Manager and FSM, you will be required to log into FSM. You use the same login credentials for FSM as you did for Configuration Manager.

1. Configure the Offerings and Modules to deploy.

For example, you might deploy Oracle Financial Analytics, with Functional Areas: Accounts Payable, Accounts Receivable, and General Ledger. See Enabling Offerings in FSM.

2. Create an Implementation Project and select an Offering and one or more Modules.

   For example, you might create an Implementation Project to configure Oracle Financial Analytics, with Functional Areas: Accounts Payable, Accounts Receivable, and General Ledger. See Creating an Implementation Project and Select Offerings.

> **Important:**
>
> When you create an Implementation Project, FSM generates the Tasks required to configure the specified Offerings. By default, the Tasks are assigned to the BI Applications Administrator user. If required, you can optionally assign Tasks to Functional Developers, who will then perform the Tasks.

3. (Optional) Assign the Tasks for the specified Offerings and BI modules to one or more Functional Developers.

   For example, you might assign Accounts Payable tasks to user Fred, Accounts Receivable tasks to user Jill, and General Ledger tasks to user Mike. To configure large projects, see Additional Steps for Managing Projects in FSM.

   Alternatively, the Tasks can be performed by the default BI Administrator user. See Assigning Tasks to Functional Developers.

4. Complete the functional configuration Tasks by clicking the **Go to Task** link.

   To access the **Go To Task** option in FSM, you must be logged into FSM as a user with either BI Applications Functional Developer Duty privileges or BI Applications Administrator Duty privileges.

   For example, user Fred performs the Tasks related to General Ledger.

5. Monitor the progress of the Implementation Project to check that the tasks have been completed.

   For example, you might use the 'Parameters by Offerings' report on the Overview page to monitor the number of parameters with no values specified. In addition, FSM provides charts for monitoring the progress of Implementation Projects. See Monitoring Implementation Projects.

   When functional Configuration is complete, you are ready to start ETL. To perform ETL, see Overview of Load Plan Life Cycle in *Oracle Business Intelligence Applications ETL Guide*.

6. If required, use Configuration Manager to make changes to the setup data.

   For example, the Implementation Manager might use the Domains and Mappings page in Configuration Manager to add a Domain, or to resolve unmapped domain values. To change configurations in Configuration Manager, see Locating Unmapped Domain Values in Configuration Manager.

After each significant configuration update, it is recommended that you back up the configuration data by using the Export feature. The backup data is useful if there is a need for disaster recovery and the recent configuration changes are lost in that process.

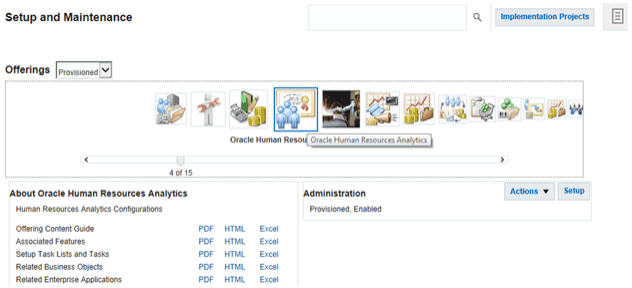
Enabling Offerings in FSM

At the start of a deployment project, you must enable your Offerings and Functional Areas for implementation.

> **Note:**
>
> The Offerings that you enable here using FSM must match the Offerings that you enable in Configuration Manager. For example, if you enable Oracle Financial Analytics in FSM, you must also enable Oracle Financial Analytics in Configuration Manager.

If you do not enable an Offering for implementation, then you will not be able to configure that Offering using FSM.

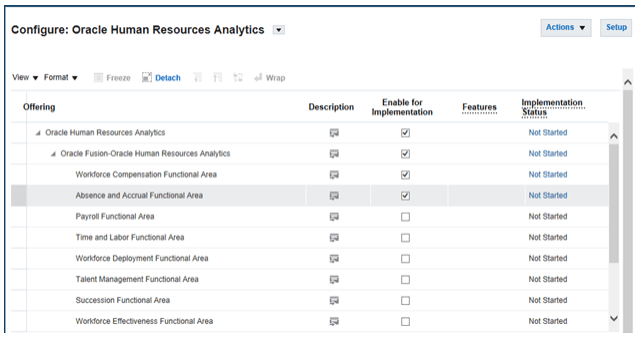
1. From the Tasks bar in Configuration Manager, select the **Perform Functional Configurations** link to launch FSM.
2. Click the offering that you want to deploy, for example, click Oracle Human Resources Analytics.



3. For offerings that you have not yet configured, click **Configure** to display the Configure page for the selected offering. For offerings that you have configured, click **Actions**, then **Change Configuration** to display the Configure page for the selected offering.

   For offerings that you have configured, if required, you can use the Setup button to view applicable offering documents, edit the implementation status, or change the configuration.

4. For each Offering and Functional Area that you want to deploy:
   a. Select the **Enable for Implementation** check box next to the Offering and each Functional Area within the Offering that you want to deploy.



> **Note:**
>
> If the value in the Provisioned column for the selected Offering is No, then you will see the following message: `Warning: This offering is not provisioned. Offering implementations cannot be completed until the offering is provisioned. Do you want to continue?`

If you want to continue, click **Yes**.

b. Select any other options that are specific to the Offerings that you have selected.

   For example, if you have selected the Financials Offering, then you must use the **Subledger Accounting Rules** field to specify the appropriate accounting method.

5. The application saves the selections in this page automatically. To exit the dialog, click **Actions**, then **Go to Offerings**.

Creating an Implementation Project and Selecting Offerings

Use FSM to create an Implementation Project to configure an Offering and the Modules that you want to deploy. For example, if you have installed Oracle Fusion Applications HCM, you might create an Implementation Project to configure the ETL for Oracle Fusion Applications HCM.

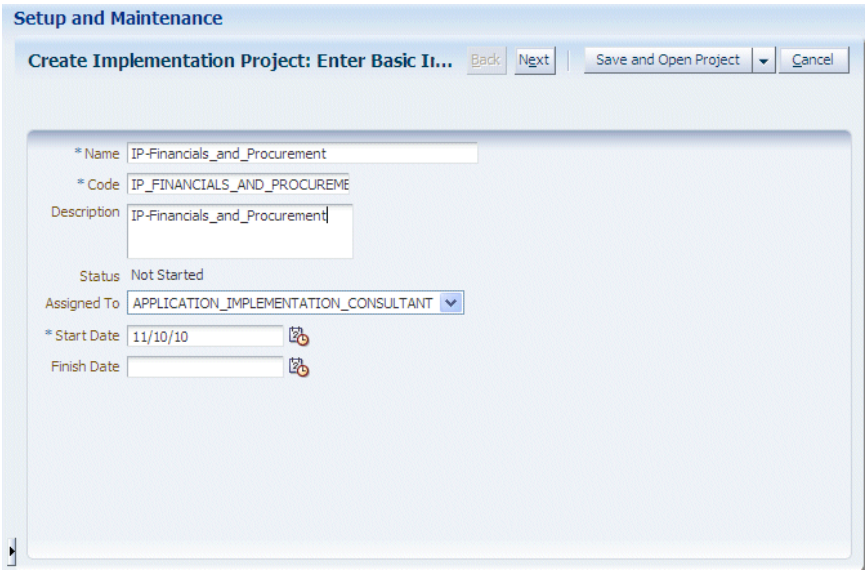
To configure ETL for Oracle Fusion Applications, you must create at least one Implementation Project. When you create an Implementation Project, you select the Offering to deploy as part of that project.

When you create an Implementation Project, FSM generates the Tasks required to configure the specified Offerings. By default, the Tasks are assigned to the BI Administrator user. If required, you can optionally assign Tasks to Functional Developers, who will then perform the Tasks.

1. From the Tasks bar in Configuration Manager, select the **Perform Functional Configurations** link to launch FSM.
2. Click **Implementation Projects** on the landing page and then click **Create** in the toolbar to create the implementation project.
3. Use the Enter Basic Information page to specify the project details.

   A default **Name**, **Code**, and **Description** are created for you. You can change these values if required. If you change the **Code** value, you must specify a unique code.

> **Tip:**
>
> Use the **Name** field to specify a meaningful project name that includes the Offerings being deployed. After selecting an Offering and Functional Area(s) for implementation as part of the IP in the next step, there is no way to go back and see which Offerings and Functional Area(s) had been selected.



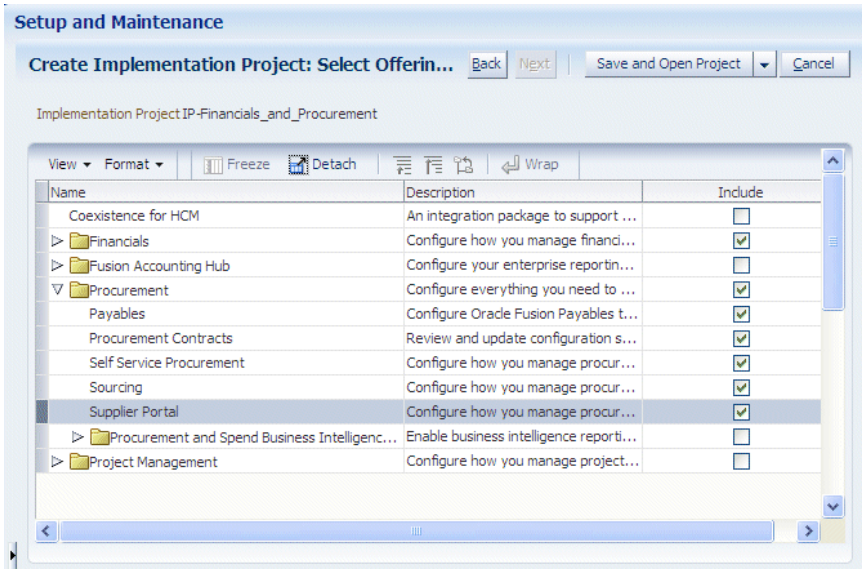
4. Click **Next** to display the Select Offerings to Implement page.

> **Note:**
>
> Do not click **Save and Open Project** because that option creates an incomplete Implementation Project, for which you cannot later specify an Offering and Functional Areas.

5. Use the Select Offerings to Implement page to specify the Offering and the Functional Areas to include in the project.

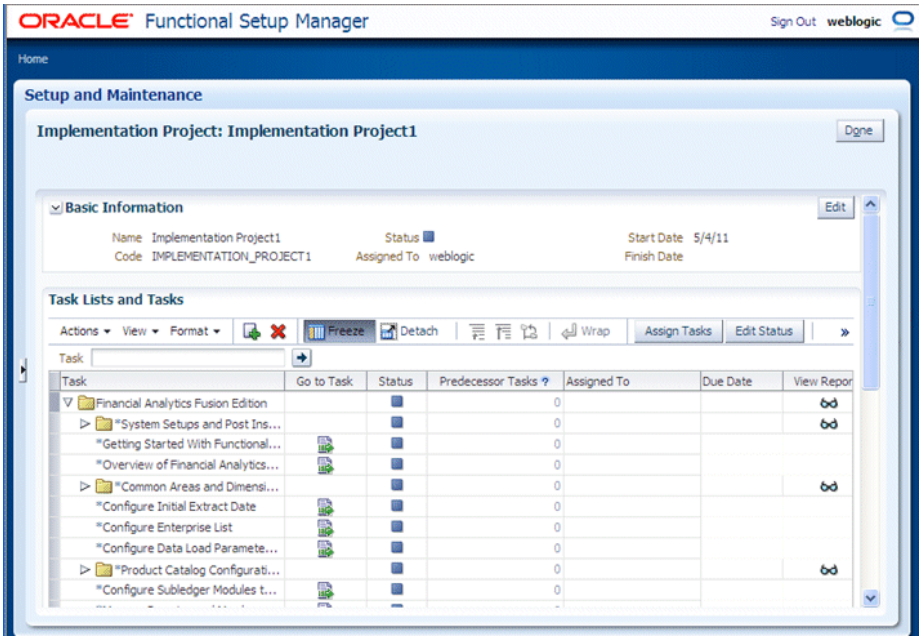
   For example, if you are configuring Oracle Procurement and Spend Analytics with Payables and Sourcing, you select the **Include** check boxes next to **Procurement**, **Payables**, and **Sourcing**.

> **Note:**
>
> To make Offerings easier to manage, Oracle recommends that you deploy one Offering in an Implementation Project. In other words, if you are deploying three Offerings, then create three Implementation Projects.



6. Save the details.

When you save the project, FSM generates the list of configuration tasks for the Offering and Functional Areas that you included in the Implementation Project.



Additional Steps for Managing Projects in FSM

When you create an Implementation Project, FSM generates a list of Tasks required to configure the selected Offering and Functional Areas.

You can perform the functional configuration of an Offering in two ways:

- In a small deployment, a single person logged in with BI Applications Administrator Duty privileges can configure Offerings using the **Go to Task** links. See Performing Functional Tasks Using the Administrator Role.

- In a large deployment, a team of Functional Developers typically configure Offerings, as follows:
  - The Implementation Manager assigns Tasks to Functional Developers.
  - Functional Developers logged in with BI Applications Functional Developer Duty privileges configure the Offerings. See Performing Functional Tasks Using the Functional Developer Role.

When you complete a Functional Task in FSM, you update the status of the Task (for example, to 'Completed', or 'Completed with Errors').

When you click **Go To Task** for an Informational Task, you display a list of steps that you must perform externally to FSM. For example, you might need to use Oracle Business Intelligence Administration Tool to configure a value in the BI metadata repository. When you have completed the steps listed in the Informational Task, you must manually set the status of the Task to 'Completed'.

If a parameter value must be re-set after the initial configuration is completed, then the BI Administrator can alternatively use the Setup Data Maintenance and Administration options in Configuration Manager.

Assigning Tasks to Functional Developers

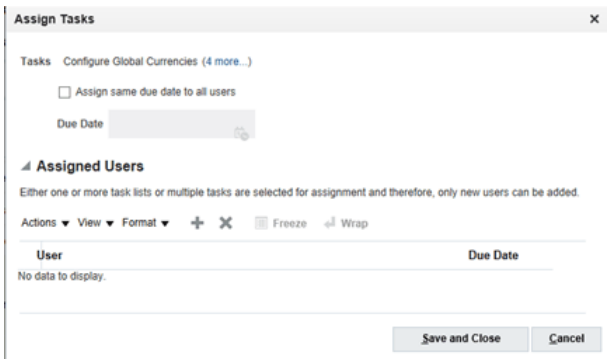
You assign Tasks to Functional Developers so that large configuration projects can be worked on by multiple people.

By default, Tasks are assigned to the BI Applications Administrator user. When you assign a Task to a Functional Developer, that Task is displayed in the Assigned Implementation Tasks tab in FSM when that person is logged into FSM.

1. From the **Tasks** bar in Configuration Manager, select the **Perform Functional Configurations** link to start FSM.

   You must be logged into Configuration Manager with the Implementation Manager or Administrator role.

2. Display the Implementation Projects page (click **Implementation Projects** on the landing page), select a plan in the list, and click **Edit**, or click on the plan name.
3. On the Task Lists and Tasks pane, select one or more Tasks, click **Assign Tasks** to display the Assign Tasks page.



4. Use the Assign Tasks page to search for and select appropriate Functional Developers.

When Functional Developers log in and display the **Assigned Implementation Tasks** tab, they only see the tasks that have been assigned to them. When BI Administrators log in and display the **Implementation Projects** tab, they see all tasks.

Performing Functional Tasks Using the Administrator Role

In a small deployment project, a single person with BI Applications Administrator Duty privileges might perform the setup and functional configuration tasks for Oracle BI Applications.

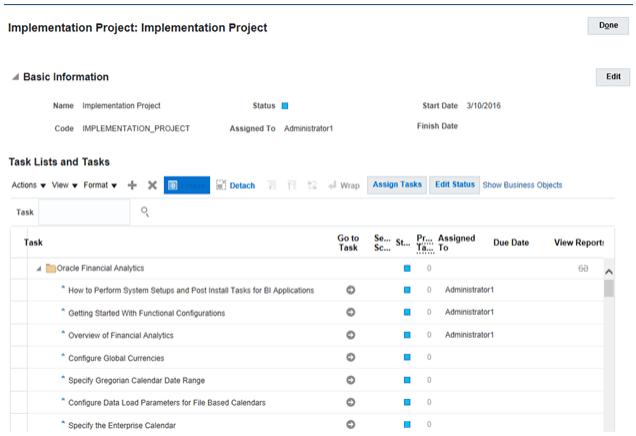
When you log into FSM with BI Applications Administrator Duty privileges, you see all Tasks that are included in an Implementation Project.

1. From the Tasks bar in Configuration Manager, select the **Perform Functional Configurations** link to start FSM.

   You must be logged into Configuration Manager with BI Applications Administrator Duty privileges.

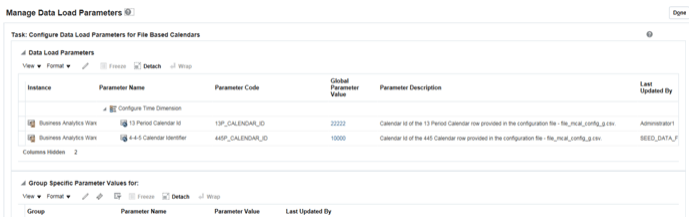
2. Click **Implementation Projects** to display the Implementation Projects page and click the Implementation Project that you created for your Offerings.

3. On the Task Lists and Tasks pane, click the **Go to Task** icon next to the task that you want to perform.



When you click **Go to Task**, you display a configuration screen that enables you complete the task.

For example, the screenshot shows the Configuration screen for specifying the data load parameters for File based Calendars task.



Performing Functional Tasks Using the Functional Developer Role

In a medium to large deployment project, a number of Functional Developers might perform functional tasks for an Offering. When you log into FSM with the Functional Developer role, you only see Tasks that have been assigned to you. You do not see Tasks that have been assigned to other Functional Developers.

1. Log into Configuration Manager with the Functional Developer role.
2. From the Tasks bar in Configuration Manager, select the **Perform Functional Configurations** link.
3. On the landing page, click **Implementation Projects**. It launches the Assigned Implementation Tasks page that displays the Task list and tasks assigned to the user.
4. On the Task Lists and Tasks pane, select a Task, and click **Go to Task**.

   When you click **Go to Task**, you display a configuration screen that enables you complete the task.

Monitoring Implementation Projects

Use FSM to monitor Implementation Projects to track the progress of an project.

1. From the Tasks bar in Configuration Manager, select the **Perform Functional Configurations** link to start FSM.

   You must be logged into Configuration Manager with an Implementation Manager role.
2. Display the Implementation Projects tab, and select the Implementation Project that you want to deploy.
3. Use the Implementation Project Details pane to monitor the status of the project.

You can also use Configuration Manager to monitor the progress of a project, maintain setup data, and extend Oracle Business Analytics Warehouse if required. See Administering and Maintaining Functional Configuration Data.

Monitoring Functional Setup Tasks

Monitor Functional Tasks that are assigned to you to track your progress in configuring the ETL for Oracle Fusion Applications that are being deployed.

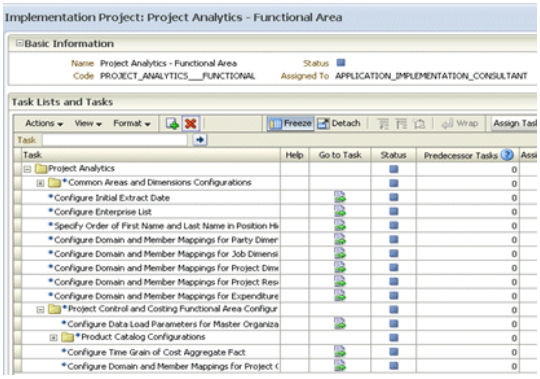
1. From the Tasks bar in Configuration Manager, select the **Perform Functional Configurations** link to start FSM.

   You must be logged into Configuration Manager with the Administrator role.
2. Display the Manage Implementation Projects page, and select the Implementation Project that you want to deploy.
3. Use the **Status** column to monitor the status of tasks.

About Completing Tasks in the Common Areas and Dimensions Configurations Task List

Whichever Offerings you include in an Implementation Project, the Tasks will include a Common Areas and Dimensions Configurations Task List, which includes tasks that are common to multiple Offerings.

For example, Configure Global Currencies is a task that is common to multiple Offerings.



After you complete a Task, you must change its status to 'Completed'. For Tasks that are listed under Completed Tasks in the Common Areas and Dimensions Configurations, a change in task status is applied across all Offerings in the implementation project. In other words, you only need to perform the Tasks under Common Areas and Dimension Configurations Task List once for each implementation project.

Performing Additional Functional Configuration Tasks

Apart from performing the tasks listed in the applicable offerings in Functional Setup Manager, you need to complete additional functional configuration tasks as required for your implementation project.

For a complete list of tasks that you may need to complete, refer to the functional and security configuration tasks described in *Oracle Business Intelligence Applications Functional Configuration Reference*.

3

About Administering and Maintaining Functional Configuration Data

During an Oracle Business Intelligence Applications (Oracle BI Applications) deployment project, you use Oracle BI Applications Configuration Manager (Configuration Manager) and Functional Setup Manager (FSM) to manage and make changes to configuration values for Data Load Parameters, Domains and Mappings, and Reporting Parameters.

Functional Configuration Data for Oracle BI Applications is:

- Configured using Functional Tasks in FSM.
- Monitored and updated using Configuration Manager.

Functional Configuration Data for Oracle BI Applications is information about the following:

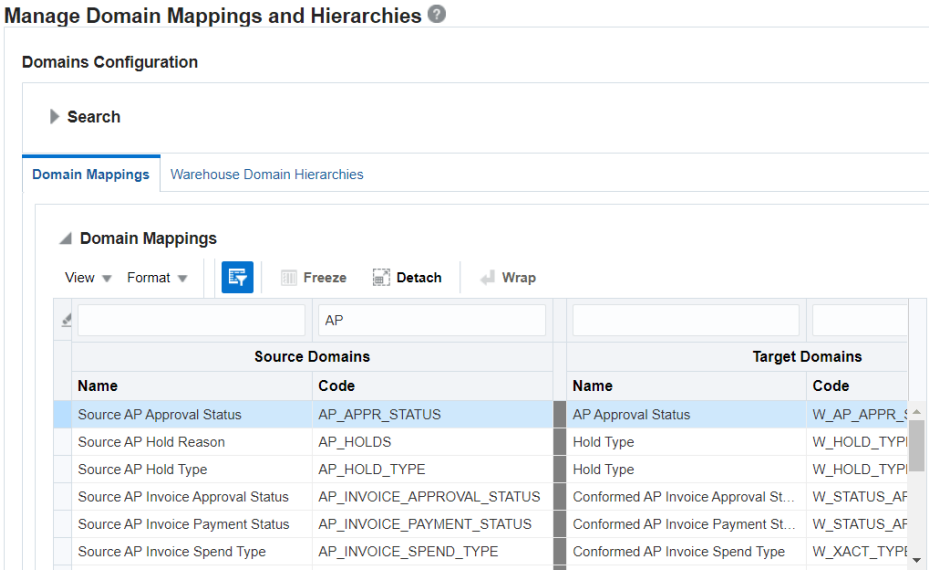
- Domains and mappings
- Data load parameters
- Reporting parameters

Roadmap for Setup Data Maintenance and Administration

Follow this high-level roadmap for Setup Data Maintenance and Administration.

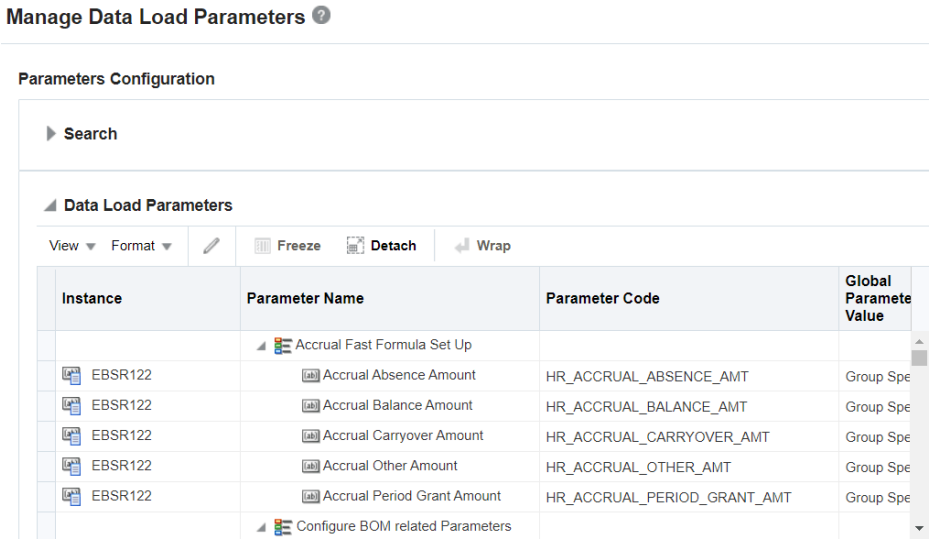
Prerequisites:
Before you configure Oracle BI Applications, you must install and set up Oracle BI Applications according to the instructions in Installing and Setting Up Oracle BI Applications in *Oracle Business Intelligence Applications Installation Guide*.

1. During the Functional Configuration stage, you typically use Configuration Manager to monitor the setup data values that have been specified using Tasks in FSM.
    - To monitor Domain Mappings, in Configuration Manager, select the **Manage Domain Mappings and Hierarchies** link from the Tasks bar to display the select Manage Domain Mappings and Hierarchies dialog.



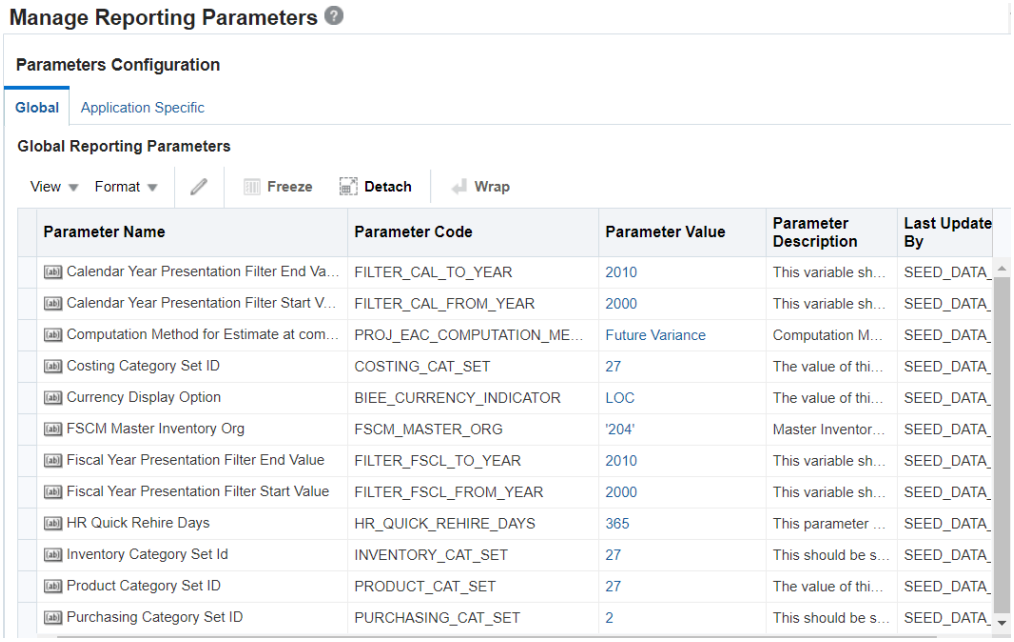
Alternatively, in FSM, select the **Go to Task** link for a Task that updates a Domain or Domain Member mappings. For example, the Task name 'Manage Domains and Member Mappings for Employee Dimension' updates Domain and Domain Member Mappings.

- To monitor Data Load Parameters, select the **Manage Data Load Parameters** link from the Tasks bar to display the Manage Data Load Parameters dialog.



Alternatively, in FSM, select the **Go to Task** link for a Task that updates a Data Load Parameter value. For example, the Task named 'Configure Data Load Parameter Workforce Adjusted Service Date' updates a Data Load Parameter value.

- To monitor Reporting Parameters, select the **Manage Reporting Parameters** link from the Tasks bar to display the select Manage Reporting Parameters dialog.



Parameter Name	Parameter Code	Parameter Value	Parameter Description	Last Update By
Calendar Year Presentation Filter End Va...	FILTER_CAL_TO_YEAR	2010	This variable sh...	SEED_DATA_
Calendar Year Presentation Filter Start V...	FILTER_CAL_FROM_YEAR	2000	This variable sh...	SEED_DATA_
Computation Method for Estimate at com...	PROJ_EAC_COMPUTATION_ME...	Future Variance	Computation M...	SEED_DATA_
Costing Category Set ID	COSTING_CAT_SET	27	The value of thi...	SEED_DATA_
Currency Display Option	BIEE_CURRENCY_INDICATOR	LOC	The value of thi...	SEED_DATA_
FSCM Master Inventory Org	FSCM_MASTER_ORG	'204'	Master Inventor...	SEED_DATA_
Fiscal Year Presentation Filter End Value	FILTER_FSCL_TO_YEAR	2010	This variable sh...	SEED_DATA_
Fiscal Year Presentation Filter Start Value	FILTER_FSCL_FROM_YEAR	2000	This variable sh...	SEED_DATA_
HR Quick Rehire Days	HR_QUICK_REHIRE_DAYS	365	This parameter ...	SEED_DATA_
Inventory Category Set Id	INVENTORY_CAT_SET	27	This should be s...	SEED_DATA_
Product Category Set ID	PRODUCT_CAT_SET	27	The value of thi...	SEED_DATA_
Purchasing Category Set ID	PURCHASING_CAT_SET	2	This should be s...	SEED_DATA_

Alternatively, in FSM, select the **Go to Task** link for a Task that updates a Reporting Parameter. For example, the Task named 'Configure Reporting Parameters for Year Prompting' updates a Reporting Parameter.

> **Tip:**
>
> Domain values can be used to define delivered business metrics; therefore, you must review the delivered domain member values and map them to the correct source values.

2. During Functional Configuration of purchased Offerings, you use FSM to monitor the status of Tasks and the setup data values that have been set.

   For example, you might use the **Status** column in the Implementation Project page in FSM to assess the number of completed tasks.

3. If required, you use Configuration Manager to make changes to the configuration values. See Changing Configuration Values Using Configuration Manager.

4. If required, you use Configuration Manager to add Domains or Domain Member values. See Adding Target Domain Members.

5. If required, you use Configuration Manager to configure Externally Conformed Domains. See Configuring Externally Conformed Domains.

About Working With Domains and Domain Mappings

Domains are pre-seeded dimensional values that help define business metrics. For example, in Financial Analytics, domains store information about the General Ledger accounts.

Domains are typically located in the source system. If domains are not available in a source system, then they can be sourced from a flat file. For example, domains for Oracle Price Analytics are loaded using the flat file `file_domain_member_gs.csv`. This file will also be used in order to supply source domains for Universal adaptor.

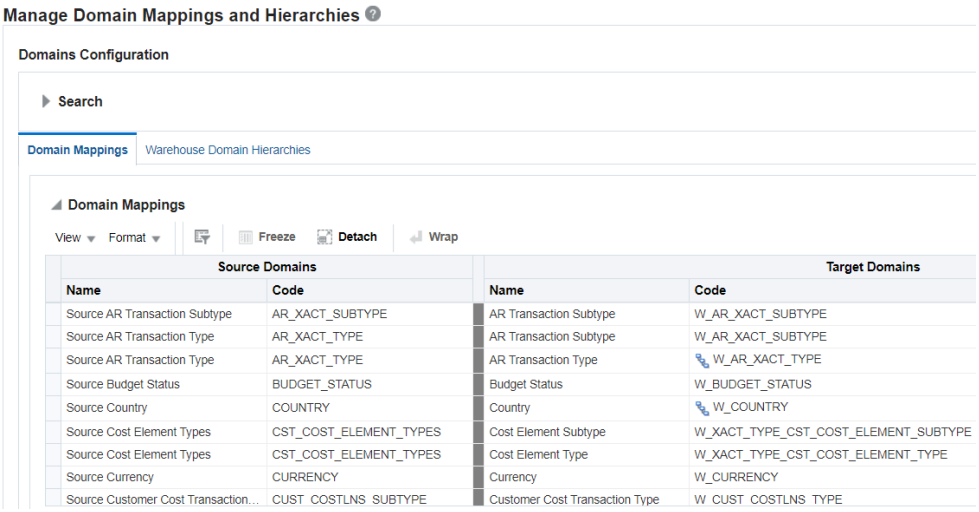
To manage Domains, you use these dialogs:

- For general Domains, you use the Manage Domains and Mappings dialog.

  To display the Manage Domains and Mappings dialog, do one of the following:

  – In FSM, select the **Go to Task** link for a Task that updates a Domain and Domain Member mappings.

  – In Configuration Manager, select the **Manage Domain Mappings and Hierarchies** link in the Tasks pane.



  The Manage Domains and Mappings dialog contains these tabs:

  – Domain Mappings - this tab shows how data fields in the Source System map to data fields in Oracle Business Analytics Warehouse. See About Domain Mappings and Domain Member Mappings.

  – Source domains - this tab shows data fields and domain members in the source system. See About Source Domains.

  – Warehouse Domains - this tab shows data fields and warehouse members in Oracle Business Analytics Warehouse. See About Warehouse Domains.

  – Warehouse Domain Hierarchies - this tab shows domains that have been organized into hierarchies to enable the data to be more effectively analyzed. See About Warehouse Domain Hierarchies.

- For externally sourced domains, you use the Manage Externally Conformed Domains dialog.

  To configure externally conformed domains, see Configuring Externally Conformed Domains.

Why Are Some Domains Non-Extensible?

To maintain data integrity in Oracle BI Applications, some domains have been designed as non-extensible, and are therefore read-only.

If a domain is non-extensible, then when the domain is selected, the following options are greyed out:

- the Edit icon in the Domain Member Mappings pane (on the Manage Domain Mappings and Hierarchies: Domain Mappings tab or Manage Domain Mappings and Hierarchies: Warehouse Domain Hierarchies tab).
- the Add Target Domain Member button (on the Edit Domain Member Mappings dialog).
- the Add Warehouse Domain Member button (on the Manage Warehouse Domains: Warehouse Domains tab\Warehouse Members pane).

About Domain Mappings and Domain Member Mappings

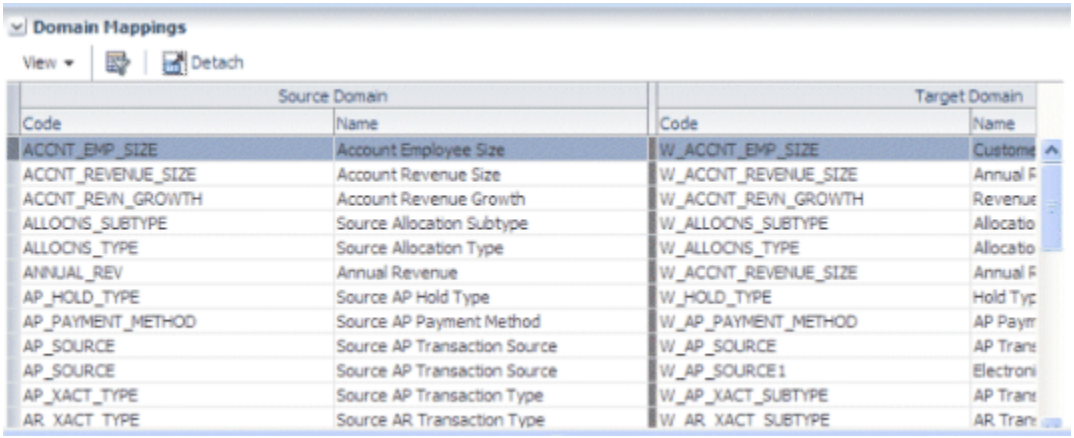
Domain Mappings specify how data in a source system is extracted and loaded into Oracle Business Analytics Warehouse. For example, the data in domain Source Group Account (BI_GROUP_ACCOUNT) extracts and loads into the domain Group Account (W_GL_GROUP_ACCOUNT).

Domain Members are the permitted values for a Source or Warehouse Domain. For example, the Domain Members for MARITAL_STATUS include D for Divorced, M for Married, S for Single, and so on.

> **Tip:**
>
> Domain values can be used to define delivered business metrics; therefore, you must review the delivered domain member values and map them to the correct source values.

Domain Mappings specify how entities in a Source System application are loaded into Oracle Business Analytics Warehouse.

The screenshot shows example domain mappings for Oracle Financial Analytics.



Domain Member Mappings specify how domain member data in a source system is extracted and loaded into domain member data in Oracle Business Analytics Warehouse. For example, in Oracle HR Analytics, domain Gender (W_SEX_MF_CODE) has a source value 'Male' that is mapped to a domain member value 'M' in Oracle Business Analytics Warehouse.

About Regular Domains and Band Domains

There are two types of Domains.

Regular Domains

Regular Domains have members consisting of a single value. For example, members for a Purchase Order Status domain might have the following members:

- Cancelled
- Closed
- Incomplete

These single values map to single member values in the target system. For example, Cancelled maps to Cancelled, Closed maps to Closed, and so on.

Band Domains

Band Domains have members consisting of two values (Range Start, and Range End) that specify a range. For example, an Account Employee Size domain might have the following members:

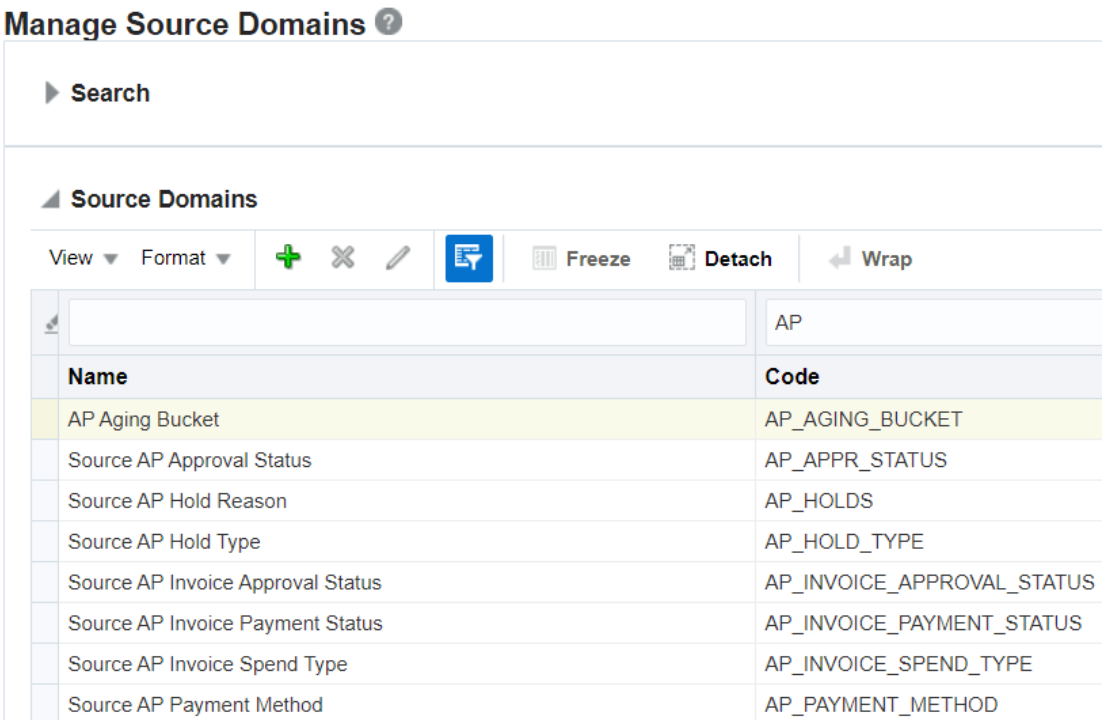
- 1, 5000
- 5001, 10,000
- 10,001, 1,000,000.

Each range maps to a single target Domain Member. For example, 1, 5000 maps to Small, 5001, 10,000 maps to Medium, and so on.

About Source Domains

Data fields in a Source System application are referred to as Source Domains.

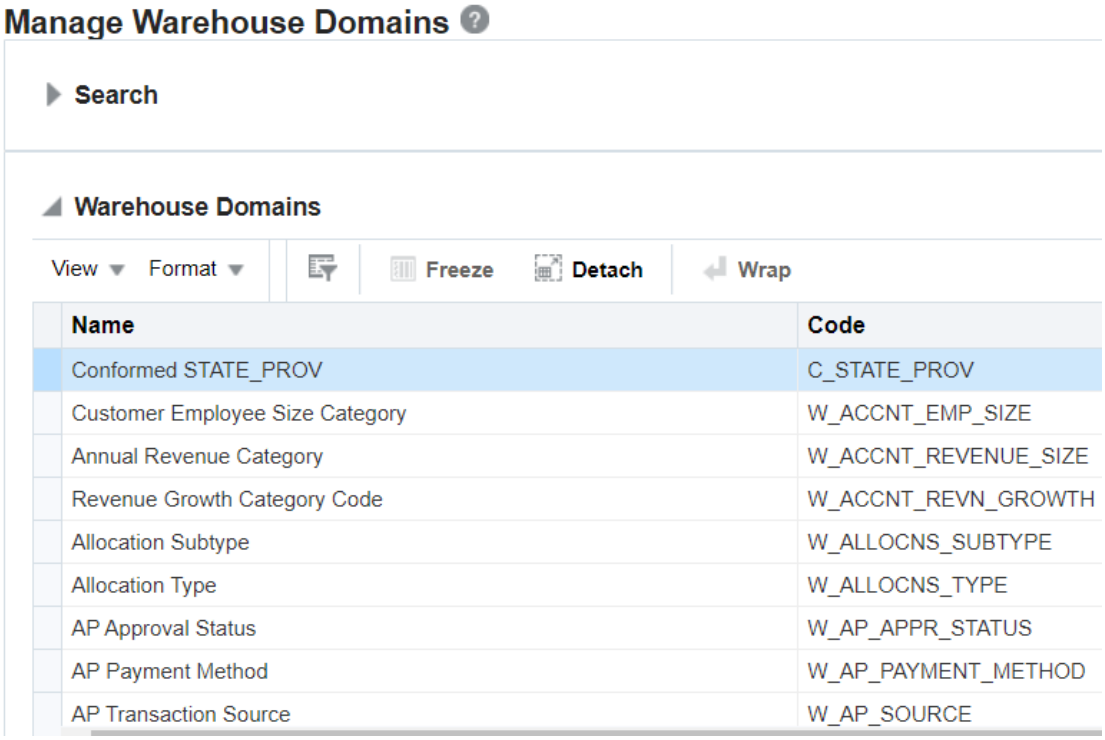
The screenshot shows example source domains for Oracle Financial Analytics. Source Domains displayed on the Source Domains tab are read-only.



About Warehouse Domains

Data fields in Oracle Business Analytics Warehouse are referred to as Warehouse Domains.

The screenshot shows example warehouse domains for Oracle Financial Analytics.



About Warehouse Domain Hierarchies

Warehouse Domain Hierarchies are Domains that have been organized into hierarchies to enable the data to be more effectively analyzed. For example, in Oracle HR Analytics, you might need to have a workforce event hierarchy: Event Group -> Event Sub-group -> Event Detail.

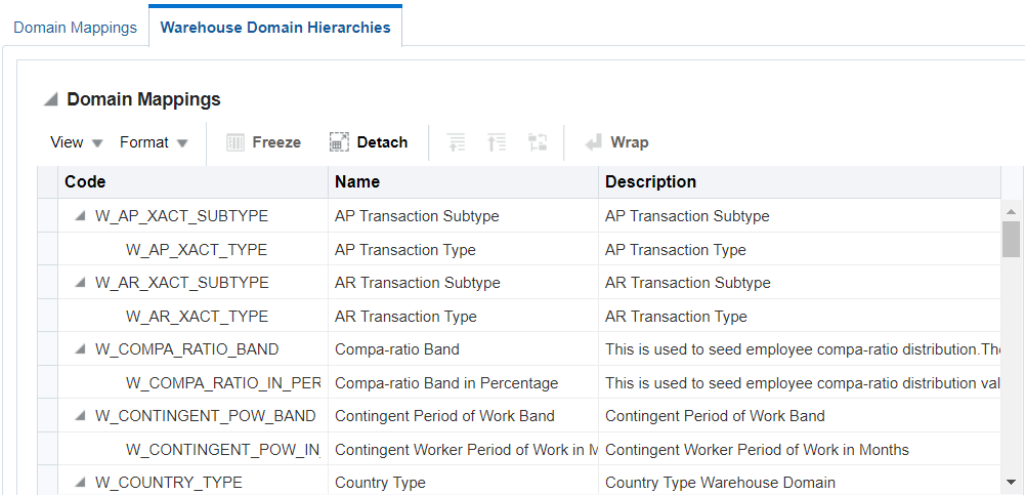
Domain Hierarchies are displayed in inverted format, that is in the following format:

```
<Child 1>\
     <Child n>\
          <Parent>
```

Viewing Domain Hierarchies

To view Domain Hierarchies, select the Manage Domain Mappings and Hierarchies link on the Tasks bar, then display the Warehouse Domain Hierarchies tab.

The screenshot shows example warehouse domain hierarchies for Oracle Financial Analytics.



In the screenshot, the child node AP Transaction Subtype is shown above and to the left of the parent node AP Transaction Type. Domain Hierarchies are read-only. However, you can change the domain mappings.

For Warehouse Domains Hierarchies dialog field-level help, see Manage Domain Mappings and Hierarchies: Warehouse Domain Hierarchies Tab in *Oracle Business Intelligence Applications Functional Configuration Reference*.

About Setting Up Domain Member Mappings

Oracle BI Applications ships default domain value mappings that map the seeded BI Application domain values to the seeded configuration data in Oracle Enterprise Resource Planning applications.

When you configure your Offerings, you review the default mappings for domain values, and if necessary update them to suit the categories that you want to use to report on your data.

For example, in Oracle HR Analytics, the default domain values for Performance Range might be similar to the following:

0 - 50: PERF_RANGE_1

50 - 60: PERF_RANGE_2

60 - 70: PERF_RANGE_3.

If you want to use these default categories, you do not need to make any changes to these mappings before you start your ETL processes.

For example, you might want to change the range for PERF_RANGE_1 from 0 - 50 to 0 - 100. Or you might want to add a new category named PERF_RANGE_4 and assign the range 100 - 500 to the new PERF_RANGE_4 category.

Editing a Domain Member Mapping

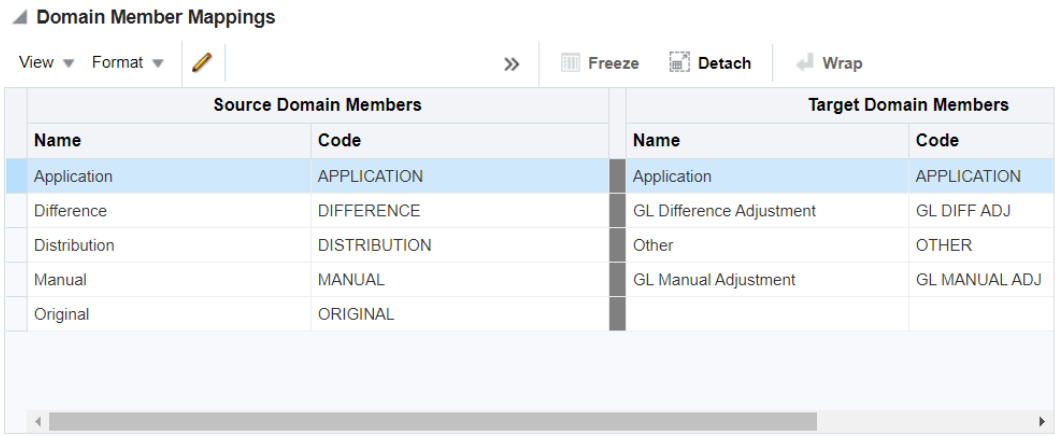
You can edit a Domain Member Mapping if you need to change it from the default values.

1. Navigate to the Domain that you want to edit.

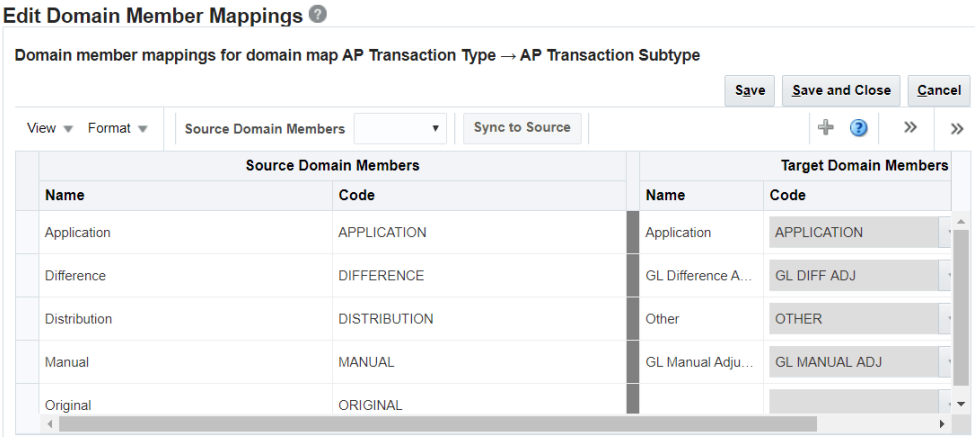
   To display the Domain Mapping tab:

   - In Configuration Manager, select **Manage Domain Mappings and Hierarchies** in the Tasks pane, display the Domain Mappings tab, then select a Domain.
   - In FSM, select the **Go to Task** link for a Task that updates a Domain or Domain Member Mappings.

2. Scroll down to the Domain Member Mappings pane.



3. Click the **Edit Domain Member Mappings** icon.



4. Edit the domain mapping values.

> **Note:**
>
> If you change existing values, then the records already loaded in the data warehouse are not modified and only new records are changed. Because new records are changed in this way, you must run a full load. However, if the change involves a new source member that is imported from the source, then all dimension records impacted due to that import are new. Because the dimension records are new, you need not run a full load.

Adding a Range Member Mapping

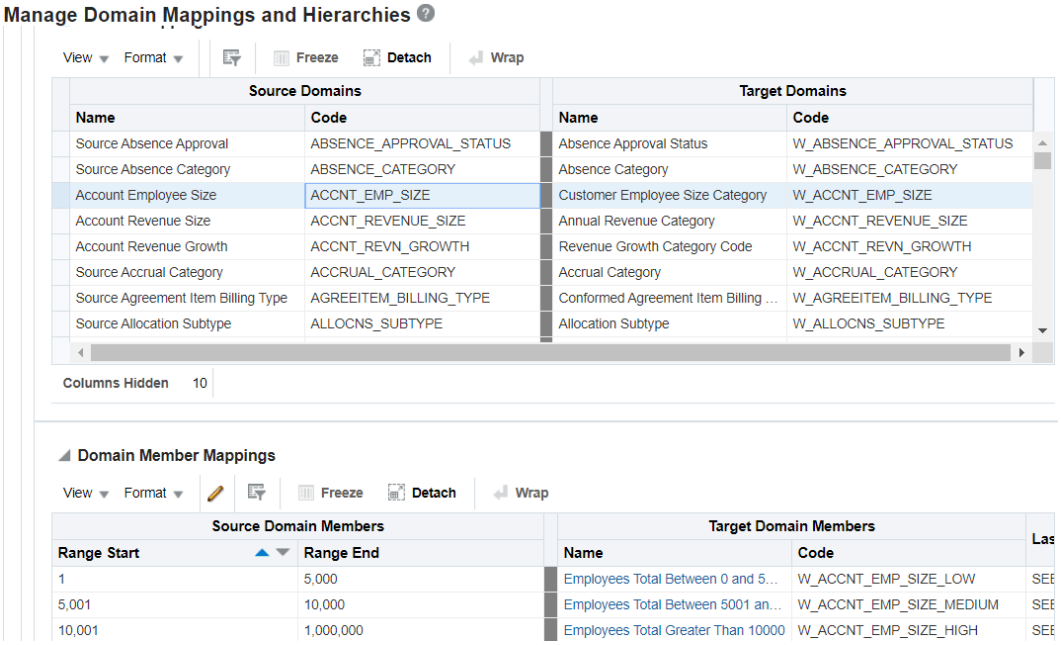
You can add a Range Member Mapping to a domain for which you can specify ranges.

1. Navigate to the Domain that you want to edit.

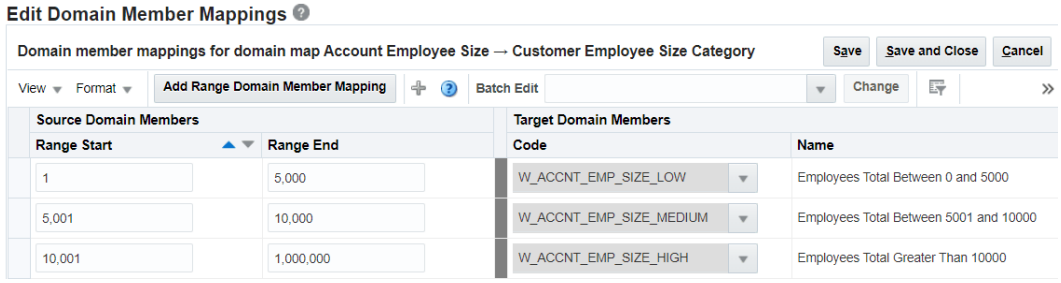
   To display the Domain Mapping tab:

   - In Configuration Manager, select the **Manage Domain Mappings and Hierarchies** link in the Tasks pane, display the Domain Mappings tab, then select a banded (or ranged) Domain.
   - In FSM, select the **Go to Task** link for a Task that updates a banded or ranged Domain or Domain Member Mappings.

2. Scroll down to the Domain Member Mappings pane.



3. Click the **Edit Domain Member Mappings** icon to display the Edit Domain Member Mappings dialog.



4. Click the **Add Range Domain Member Mapping** icon and specify values in the **Range Start**, **Range End**, and **Target Domain Members** - **Code** fields.

> **Tip:**
>
> Before you create a new range, you might first want to use the **Add Warehouse Member** button to first create a target Warehouse Member, which is then available as an option in the **Target Domain Member** - **Code** list. For example, you might add a Warehouse Member called 'Greater than 250,000' to map to the range 250,000 to 1,000,000.

Adding a Target Domain Member

You add Target Domain Members to extend Oracle Business Analytics Warehouse.

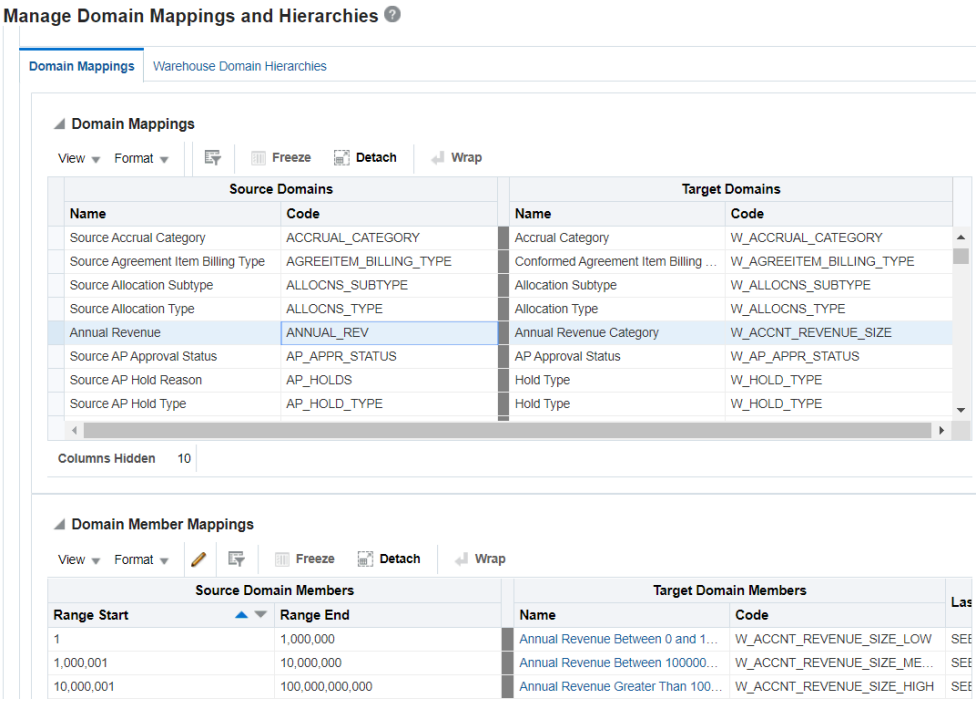
1. Navigate to the Domain that you want to edit.

   To display the Domain Mapping tab, do one of the following:

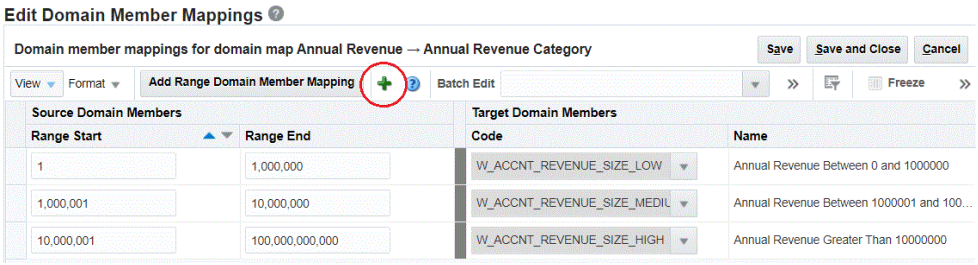
   - In Configuration Manager, select the **Manage Domain Mappings and Hierarchies** link in the Tasks pane, display the Domain Mappings tab, then select a Domain.

- In FSM, select the **Go to Task** link for a Task that updates a Domain or Domain Member Mappings.

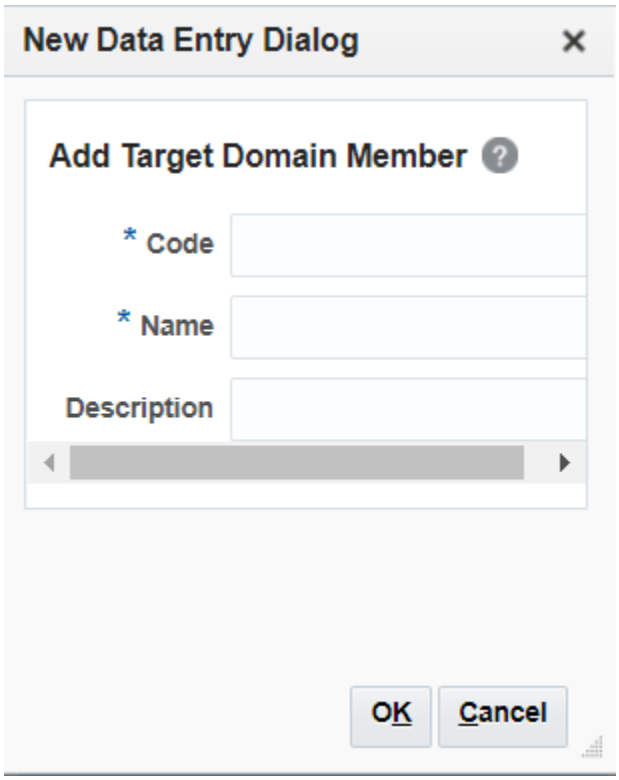
2. Scroll down to the Domain Member Mappings pane.



3. Click the **Edit Domain Member Mappings** icon to display the Edit Domain Member Mappings dialog,



4. Click the plus sign (+) icon (**Add Warehouse Domain Member**) to display the Add Target Domain Member dialog, which enables you to specify a Name, Code, and optional Description.



For example, you might add a Warehouse Member called 'Greater than 250,000' to map to the range 250,000 to 1,000,000.

If the **Add Target Domain Member** option is grayed out or not displayed, then the domain is non-extensible.

When you click **OK** to return to the Edit Domain Member Mappings dialog, you can map a Source Domain to the Target Domain that you just created.

Localizing a New Domain Member

If you added a new domain member and it requires localization, you can add string localizations for Configuration Manager metadata.

1. Open a database administration tool, and connect to the Oracle Business Analytics Warehouse schema.
2. Query for the table C_DOMAIN_MEMBER_TL and the new domain member record you added in Adding a Target Domain Member.

   You can query for the new domain member record by using the query filter on the columns CREATED_BY and CREATION_DATE. Each new domain member record will have 28 rows in the C_DOMAIN_MEMBER_TL table.
3. Update the LANGUAGE_CODE column to match the localized deployment language.
   a. Identify the language code for the localized language using the following SQL:

   ```
   SELECT LANGUAGE_CODE, NLS_LANGUAGE, NLS_TERRITORY
   FROM FND_LANGUAGES_B
   WHERE INSTALLED_FLAG IN ('B', 'I');
   ```

   b. Update the domain member name, description, and source language code strings for the localized language using the following SQL:

      In this example, the localized language is Arabic, and the LANGUAGE_CODE is AR.

```
UPDATE C_DOMAIN_MEMBER_TL
SET DOMAIN_MEMBER_NAME = '<Arabic translated string for domain member
name>', DOMAIN_MEMBER_DESCR = '<Arabic translated string for domain
member description>', SRC_LANGUAGE_CODE = 'AR'
WHERE DOMAIN_KEY = '<Domain key value for the record you want to update>'
AND DOMAIN_MEMBER_CODE = '<Domain member code value for the record you
want to update>'
AND LANGUAGE_CODE = 'AR';
```

4. Exit the database administration tool.
5. Restart the Oracle WebLogic Server.

Adding String Localizations for Oracle BI Repository Metadata

If you added a new domain member, you can add string localizations in the Oracle BI Repository metadata.

1. Stop the OPMN services.

   Use the command: `opmnctl stopall`.

2. Open a database administration tool, and connect to the Oracle Business Analytics Warehouse schema.
3. Identify the strings for the following presentation objects:
   - Subject area
   - Presentation table
   - Presentation hierarchy
   - Presentation level
   - Presentation column

   For example, for the subject area Payables Invoices - Prepayment Invoice Distributions Real Time, enter the following strings:

String	Presentation Object
Payables Invoices - Prepayment Invoice Distributions Real Time	Subject area
Time	Presentation table
Date - Year	Presentation hierarchy
Total	Presentation level
Year	Presentation level
Calendar Year	Presentation column

4. For each subject area, externalize the strings for localization and generate custom names for the presentation objects:
   a. In the Oracle BI Administration Tool, right-click the subject area and select **Externalize Display Names**, and then select **Generate Custom Names**.
   b. Save your work.

   See Localizing Metadata Names in the Repository in *System Administrator's Guide for Oracle Business Intelligence Enterprise Edition*.
5. Check the consistency of the repository, and remove any inconsistencies.

See Checking the Consistency of a Repository or Business Model in *Metadata Repository Builder's Guide for Oracle Business Intelligence Enterprise Edition*.

6. Enter the custom name of one of the presentation objects into the table C_RPD_MSGS:

```
INSERT INTO C_RPD_MSGS(MSG_ID, CREATED_BY, CREATION_DATE)
VALUES('<CUSTOM NAME OF PRESENTATION OBJECT>', 'CUSTOM', SYSTIMESTAMP);
COMMIT;
```

To view the values for custom names and logical columns in the Oracle BI Administration Tool, right-click the presentation object and select **Properties**. The data in the **Custom display name** field appears in the format VALUEOF(NQ_SESSION.VALUE, where VALUE is the custom name for a presentation object, or the logical value for a presentation column. This value is the value that you need to enter in the VALUES section of the SQL statement above.

7. Enter the localized string for the presentation object in the previous step into the table C_RPD_MSGS_TL:

```
INSERT INTO C_RPD_MSGS_TL(MSG_ID, MSG_TEXT, LANGUAGE_CODE, CREATED_BY,
CREATION_DATE)
VALUES('<CUSTOM NAME OF PRESENTATION OBJECT>', '<LOCALIZATION OF THE
STRING'>, '<LANGUAGE CODE FOR TRANSLATED LANGUAGE>', 'CUSTOM',
SYSTIMESTAMP);
COMMIT;
```

To identify the language code for a particular language, use the following SQL:

```
SELECT LANGUAGE_CODE, NLS_LANGUAGE, NLS_TERRITORY
FROM FND_LANGUAGES_B
WHERE INSTALLED_FLAG IN ('B', 'I');
```

8. Enter additional details about the presentation object into the table C_RPD_MSGS_REL as indicated by the following SQL:

```
INSERT INTO C_RPD_MSGS_REL(MSG_ID, MSG_NUM, MESSAGE_TYPE, CREATED_BY,
CREATION_DATE)
VALUES('<CUSTOM NAME OF PRESENTATION OBJECT>', '<TRANSLATION OF THE
STRING'>, '<LANGUAGE CODE FOR TRANSLATED LANGUAGE>', 'METADATA','CUSTOM',
SYSTIMESTAMP);
COMMIT;
```

9. Repeat steps 6 through 8 for each presentation object requiring localization.
10. Validate that the physical connection of the session initialization block INIT_USER_LANGUAGE_CODE is operable:
    a. In the Oracle BI Administration Tool, select **Manage**, **Variables**, **Session Initialization Block**.
    b. Right-click **INIT_USER_LANGUAGE_CODE**.
    c. In the Properties dialog, click **Edit Data Source**.
    d. Click **Test**, and input the value for the language code. Then, click **OK**.

       For example, for Arabic enter 'AR'.

The value `USER_LANGUAGE_CODE = '<language code>'` should be returned.

If this value is not returned, the TNS entry for the data source is not properly configured.

11. Restart the OPMN services.
12. Verify the localized strings in Oracle BI Answers. On the login page, specify the appropriate language.

Synchronizing a Target Domain with a Source Domain

In some scenarios, you might only know what target Domain member values should be when you deploy Oracle BI Applications.

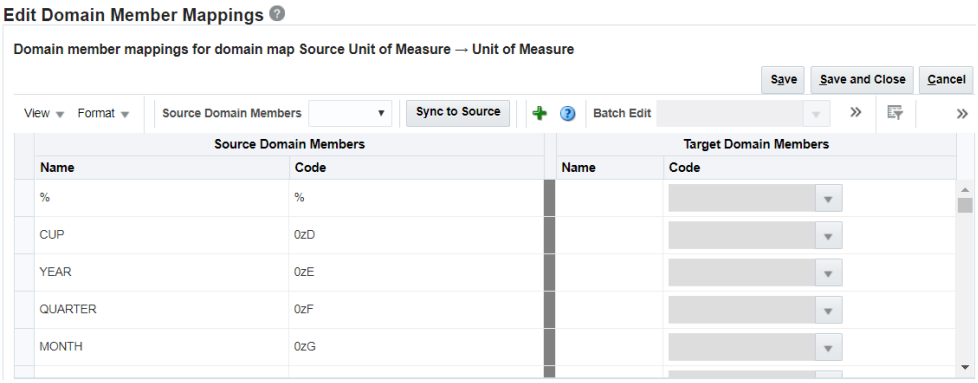
For example, in Order Management or Supply Chain Analytics, UOM (Unit of Measurement) is typically not known until deployment time. You can set up a non-ranged target domain using the **Sync to Source** option to automatically synchronize a target domain with values from the source domain. This process inserts new target members from the source domain, and automatically generates 1:1 mappings. This is useful for large domains with many member mappings that might otherwise take a long time to set up.

Sync to Source is only available for extensible non-ranged Domains.

1. Navigate to the Domain that you want to synchronize.

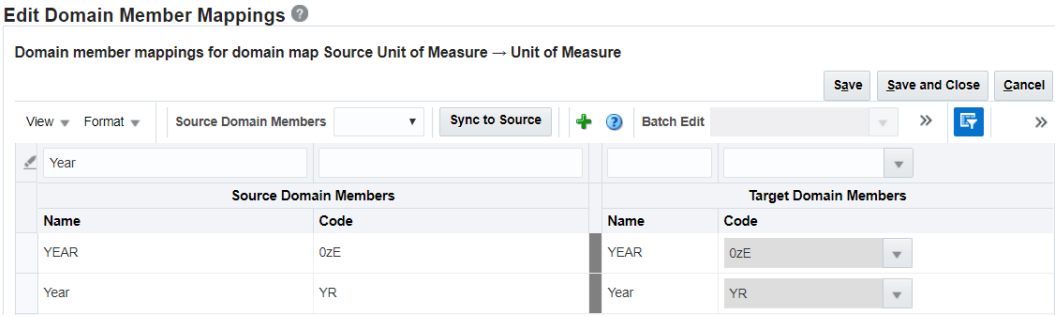
   If you are in Configuration Manager, from the Tasks bar click **Manage Domains and Mappings**, display the Domain mappings tab, select the Domain that you want to edit, then click the **Edit Domain Member Mappings** icon in the Domain Member Mappings pane to display the Edit Domain Member Mappings dialog.

   If you are in FSM, when you click **Go to Task** for the Task that is updating a Domain, you display the Edit Domain Member Mappings dialog.



2. Click **Sync to Source**.

   Target Domain member values are generated. In the example below, the target codes for "Year" are automatically synchronized with the source domain member codes.



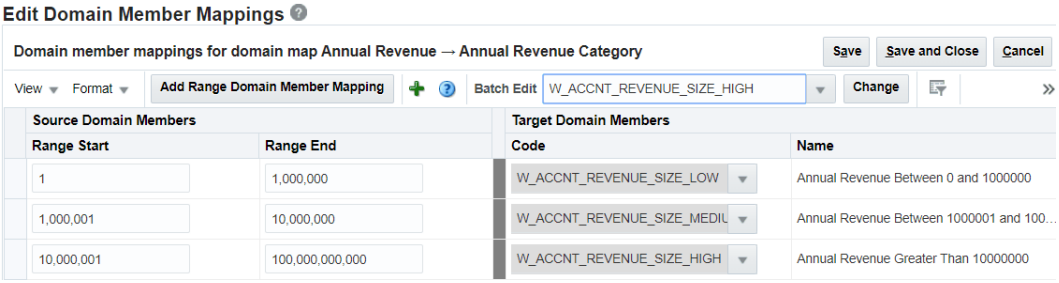
Updating Multiple Target Domain Member Values

You can set up a target domain using the Batch Edit option to update multiple target domain members with the same value. This is useful for large domains with many member mappings that require the same value.

1. Navigate to the Domain that you want to edit.

   If you are in Configuration Manager, from the Tasks bar click **Manage Domains and Mappings**, display the Domain mappings tab, select the Domain that you want to edit, then click the **Edit Domain Member Mappings** icon in the Domain Member Mappings pane.

   If you are in FSM, click **Go to Task** for the Task that is updating a Domain.

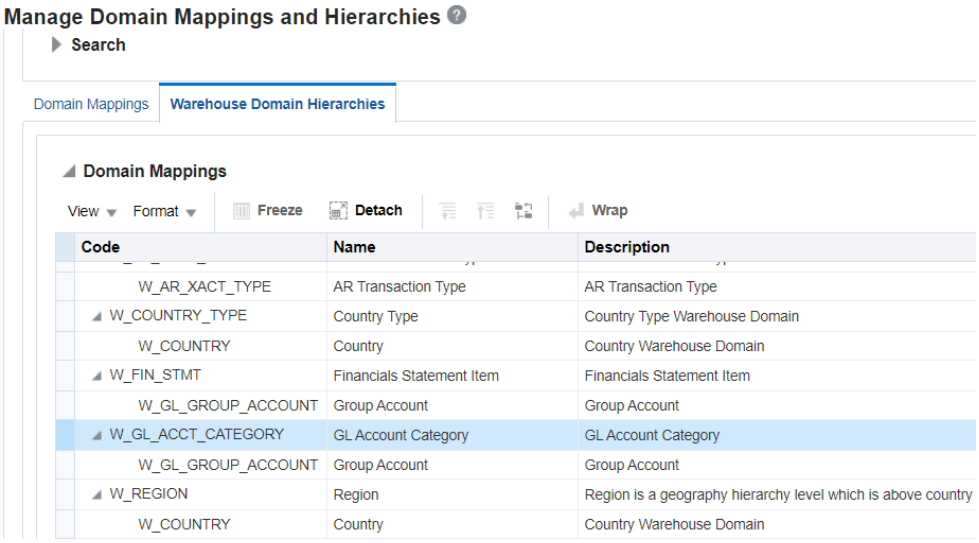


2. **Ctrl + click** to multi-select one or more rows in the table.
3. Select a value from the **Batch Edit** drop-down list.
4. Click **Change** to apply the value selected in the **Batch Edit** drop-down list to all specified members.

Modifying a Warehouse Domain Hierarchy

Oracle BI Applications Warehouse Domains are organized into hierarchies. You might want to modify a hierarchy to enable data to be more effectively analyzed. For example, you might change the order of items in a hierarchy.

1. In the Domain mappings list, select the Domain Mapping that you want to edit.

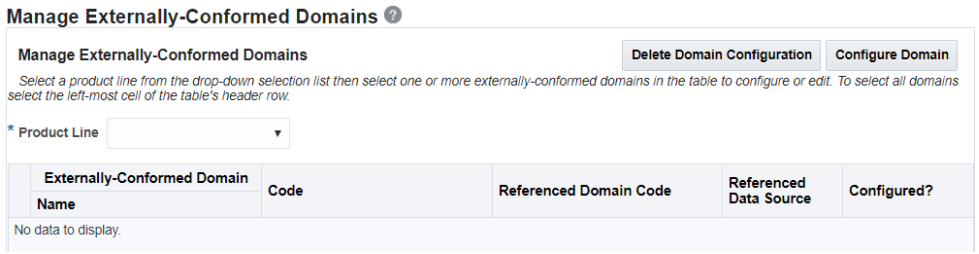


2. Use the options at the top of the Domain Mapping list to change the hierarchy.

Configuring Externally Conformed Domains

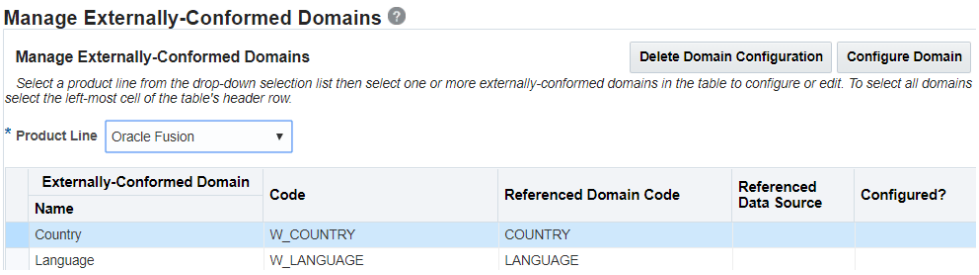
You can manage and create conformed domains in Oracle Business Analytics Warehouse that are based on definitions in a source system. For example, you might want to configure Units of Measure (UOMs) that are sourced from a pre-defined master product-line (typically Fusion) source domain.

1. In Configuration Manager, select the **Manage Externally Conformed Domains** link in the Tasks pane to display the Manage Externally Conformed Domains dialog.



2. Use the **Product Line** drop-down list to select a source system.

   When a source system is selected, domains for that source system are displayed.



> **Note:**
>
> If your implementation requires user-conformed domains that don't have default predefined values other than Not Applicable and Unassigned, then you can add applicable values using the Manage Warehouse Domains page. Search for the applicable domain and select it from the search results. This enables the **Add** (**+**) button. You can then use the Manage Externally Conformed Domains page to enter the domain values and later use the Manage Domain Mappings and Hierarchies page to map the values.

3. In the domains list, select the Domain that you want to configure and click **Configure Domain** to start the configuration wizard.

> **Note:**
>
> If a domain has already been configured, before you can configure the domain using the wizard, you must first delete the existing configuration by clicking **Delete Domain Configuration**.
>
> If a domain has already been configured, a green tick is displayed in the **Configured?** field, and the unique ID of the data source is displayed in the **Referenced Data Source** field.

4. Follow the on-screen instructions on the configuration wizard.
5. Click **Save**.

   If you include the configured domain in a Load Plan for ETL, the data is loaded into Oracle Business Analytics Warehouse from the specified source domain.

About Working With Data Load Parameters

Data Load Parameters are configuration values that specify how Source System data is loaded into Oracle Business Analytics Warehouse. For example, the cost time grain parameter COST_TIME_GRAIN specifies whether costs are aggregated weekly, monthly, or quarterly, during the data loading process.

When you work with Data Load Parameters in Configuration Manager, note the following key points:

- Data Load Parameters can be either Global or Application Specific, as follows:
  - Global parameters apply to all applications, and are indicated with the (ab) and globe icon:

    Global Data Load Parameters can also be associated with specific Fact Groups or Dimension Groups.

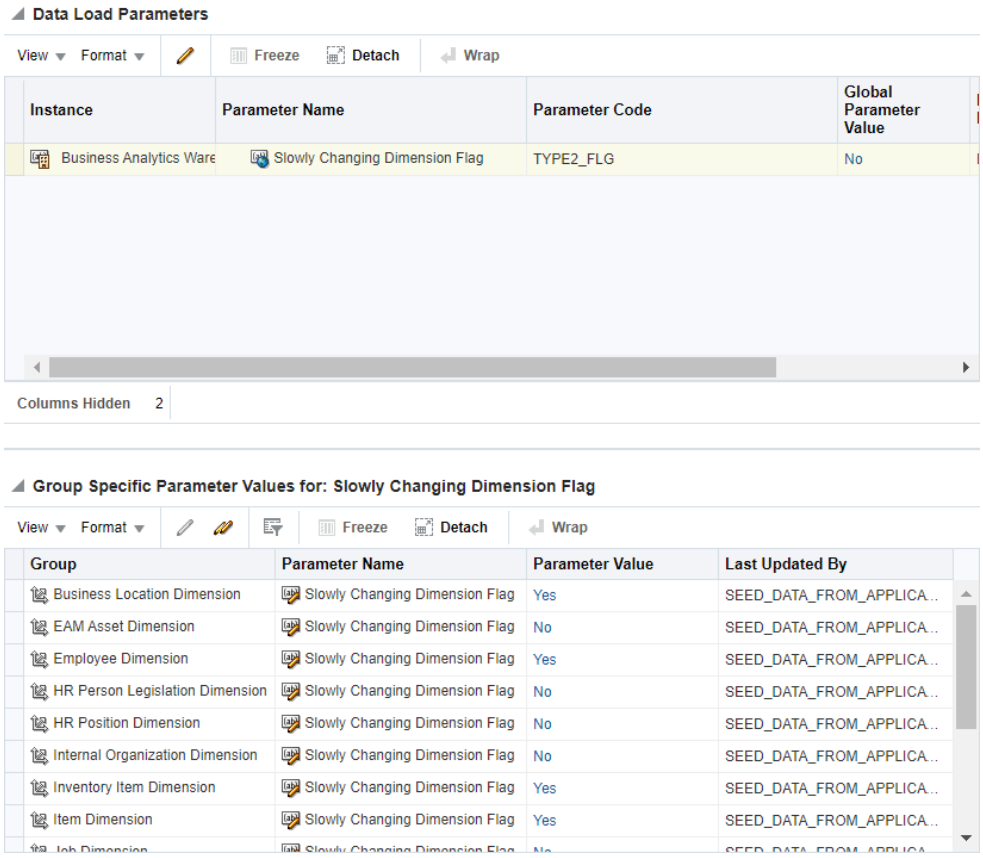
  - Application Specific apply to specific applications, and indicated with the (ab) icon:

    Application Specific Data Load Parameters are always associated with one or more Fact Groups or Dimension Groups.

- If a Global Data Load Parameter is associated with one or more Fact Groups or Dimension Groups, then each Fact Group or Dimension Group can have a different value. For example, the value of Slowly Changing Dimension Flag for Absence Event Dimension might be Yes, and the value of Slowly Changing Dimension Flag for Asset Dimension might be No.

  Values for Global Group-specific parameters are always overridable, and are indicated by the Overridable Parameter icon (that is, the (ab) icon with a pencil):

  The example below shows the Slowly Changing Dimension Flag global parameter with associated Group-specific values displayed in the lower pane.

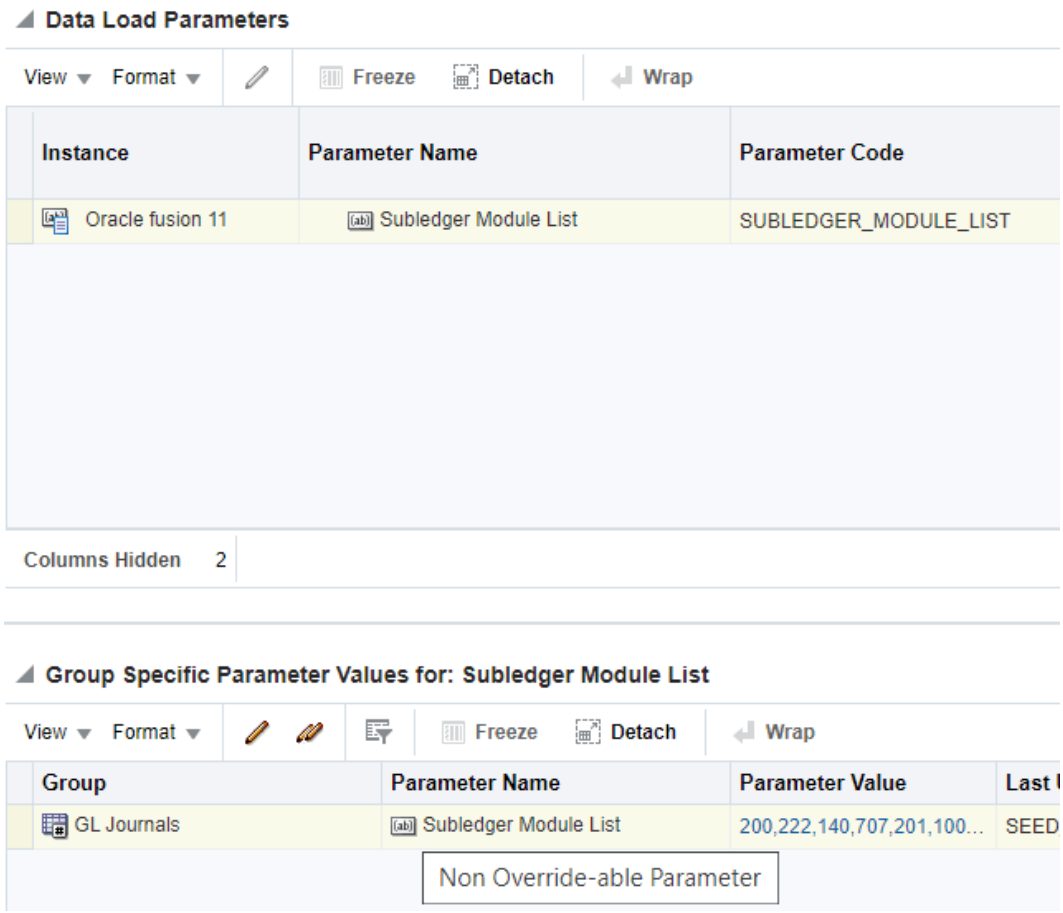
  

- For Application Specific Data Load Parameters, values for associated Fact Groups or Dimension Groups can either be Overridable or Non-Overridable, as follows:

  Overridable - each associated Fact Group or Dimension Group can have a different value. Overridable parameters are indicated by the Overridable Parameter icon (that is, the (ab) icon with a pencil):

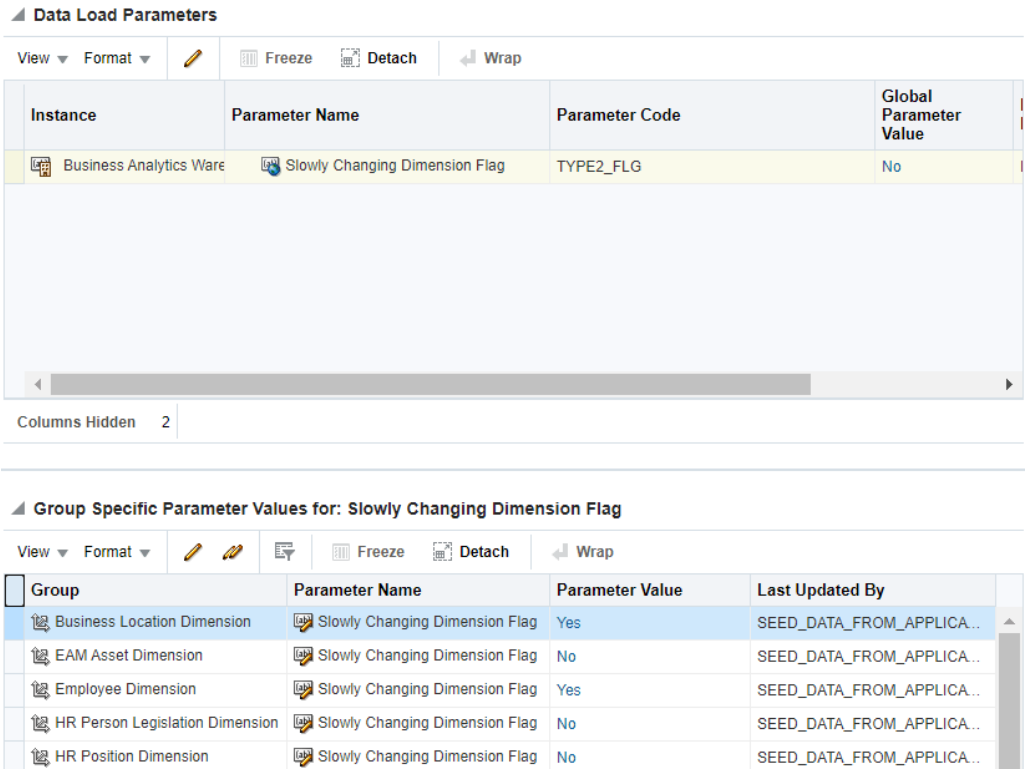
  Non-Overridable - each associated Fact Group or Dimension Group must have the same value. Non-Overridable parameters are indicated by the Parameter icon (that is, the (ab) icon without a pencil):

  The example below shows the Application Specific parameter 'Subledger Module List' with associated Group-specific values displayed in the lower pane. Note that the Group-specific values in this example cannot be overridden.

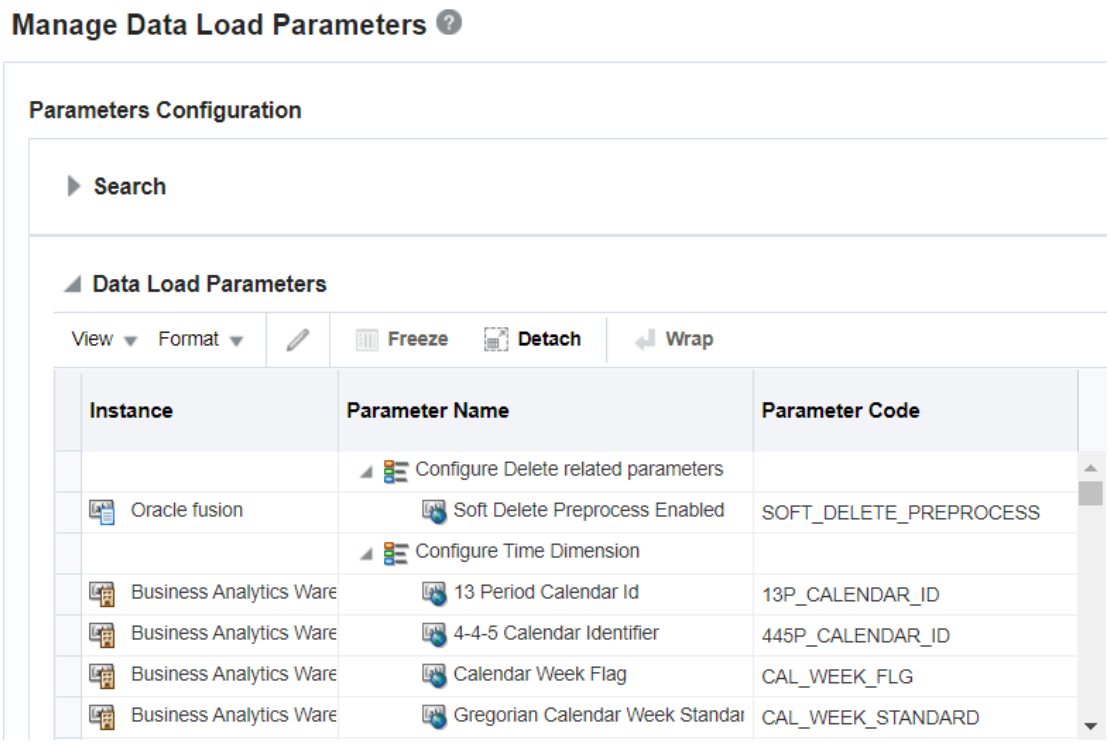


About Editing Data Load Parameters

You edit Data Load Parameters (whether they are Global or Application Specific) using the Data Load Parameters dialog, which is displayed in FSM when you edit a Data Load Parameter (see the following screenshot). The Data Load Parameters list above (or master table) displays the parameters and values, and the Group Specific Parameter Values list below displays associated Fact Groups or Dimension Groups (if there are any).



To display Data Load Parameters in Configuration Manager, select the **Manage Data Load Parameters** link on the Tasks bar to display the Manage Data Load Parameters dialog.

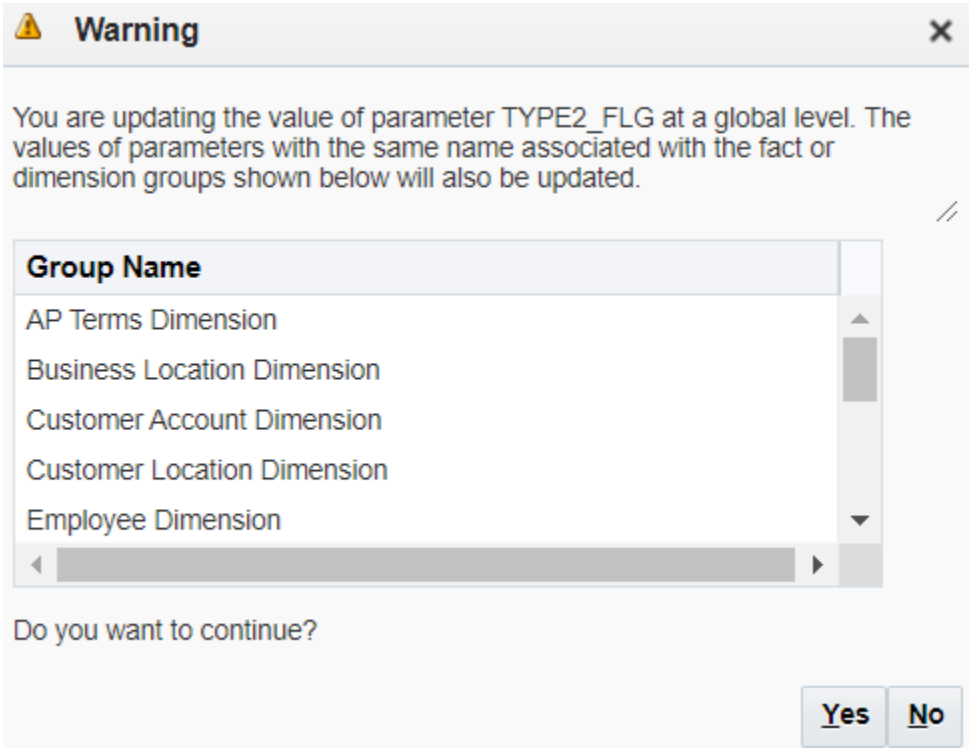


About Editing Global Data Load Parameters

To edit the value of a Global Parameter, select the record in the Data Load Parameters master table, and then either click the Edit icon in the table toolbar or click on the link in the Global Parameter Values column.

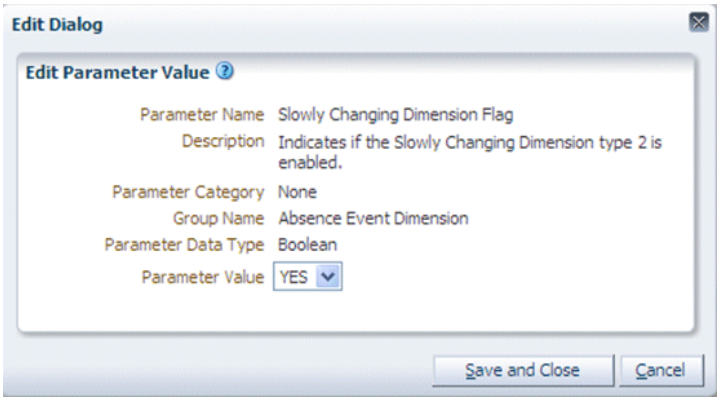
If the Global Parameter that you edit is associated with Fact Groups or Dimension Groups, then a warning message is displayed to verify that you want to update the value for all associated Fact Groups and Dimension Groups. If you click Yes at the warning message, then the values of all occurrences of the parameter at the Group level will be updated to the new value.

For example, if you click the Edit icon or the link in the Parameter Value column for the parameter "Slowly Changing Dimension Flag" in the Data Load Parameters master table, then you see the following warning:



Clicking **Yes** allows you to continue with the edit of the parameter value. A change to the parameter value is applied to all parameter occurrences at the Group level.

To change the value of a parameter for a specific Fact Group or Dimension Group, select the Global Parameter in the Data Load Parameters master table, and then select the parameter in the Group Specific Parameter Values for: <*Parameter Name*> detail table. Click on the **Edit** icon in the table tool bar or the link in the Parameter Value column to open the Parameter Value Edit dialog.



Changing the parameter value in the above Edit dialog updates the parameter value for the Slowly Changing Dimension Flag parameter associated with the Absence Event Dimension Group.

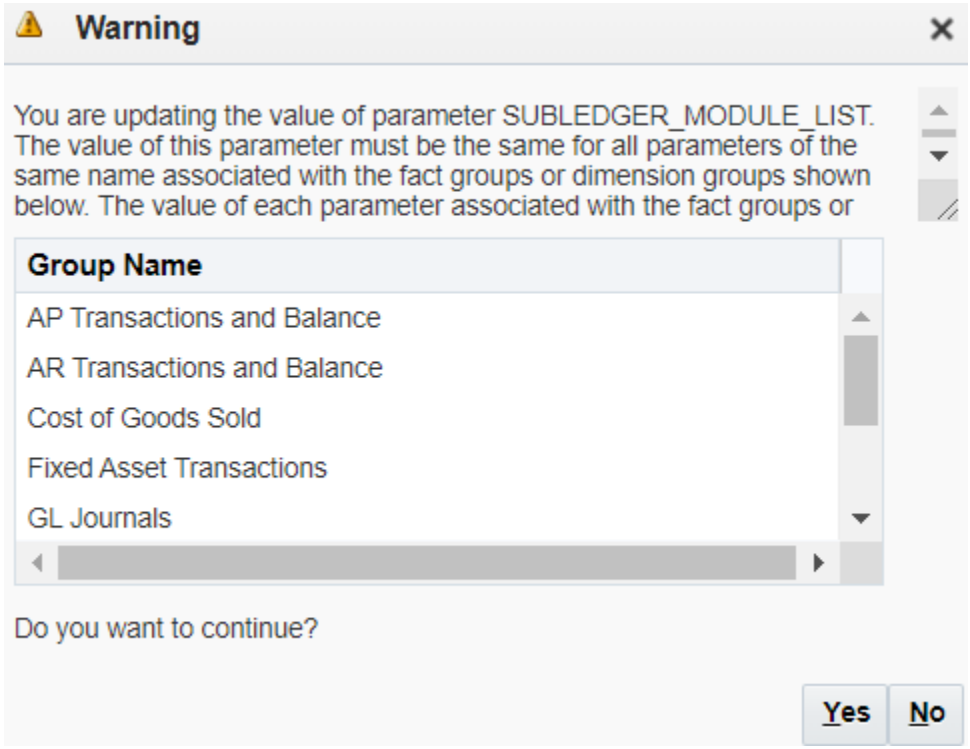
About Editing Application Specific Parameter Values

You use the **Edit** option to change the value of a Fact Group or Dimension Group that is associated with an Application Specific parameter (if the parameter is overridable).

You use the **Edit All** option to edit the value of all Fact Groups and Dimension Groups that are associated with an Application Specific parameter.

If you attempt to edit the value of a specific Fact Group or Dimension Group, then:

- if the parameter is overridable at the Group level, then you update only that specific Fact Group or Dimension Group.
- if the parameter is Non-Overridable at the Group level, then a Warning dialog displays a list of Fact Groups and Dimension Groups that will be affected if you click **Yes** to edit the value.



Editing a Data Load Parameter Value

You can edit Data Load Parameters using the Manage Data Load Parameters dialog.

- In Configuration Manager, select the **Manage Data Load Parameters** link in the Tasks pane.
- In FSM, select the **Go to Task** link for a Task that updates a Data Load Parameter (for example, Configure Initial Extract Date).

1. Select the parameter in the **Data Load Parameters** list.

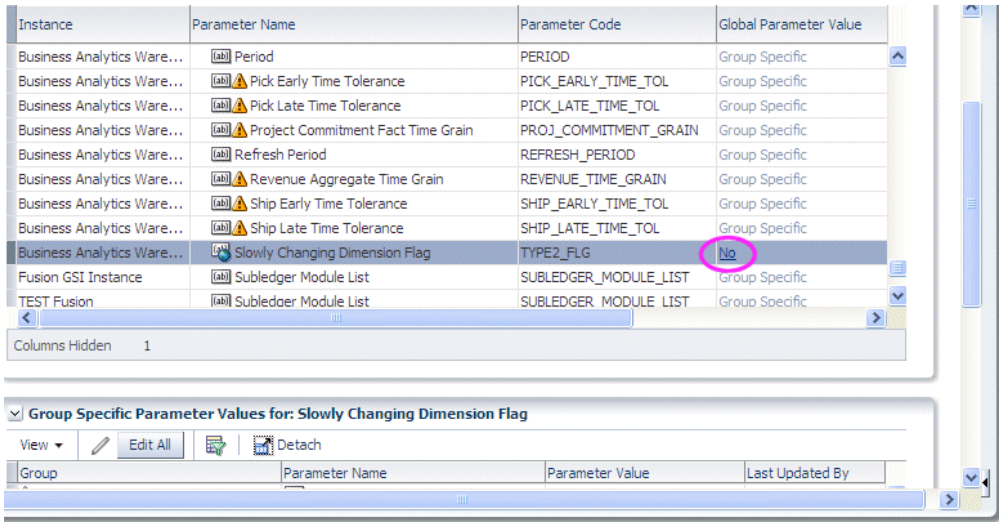
   If the parameter is a Global parameter, then the **Global Parameter Value** field displays the actual value (for example, 'MONTHLY').

   If the parameter is a non-Global parameter, then the **Global Parameter Value** field displays the text 'Group Specific').

2. Do one of the following:

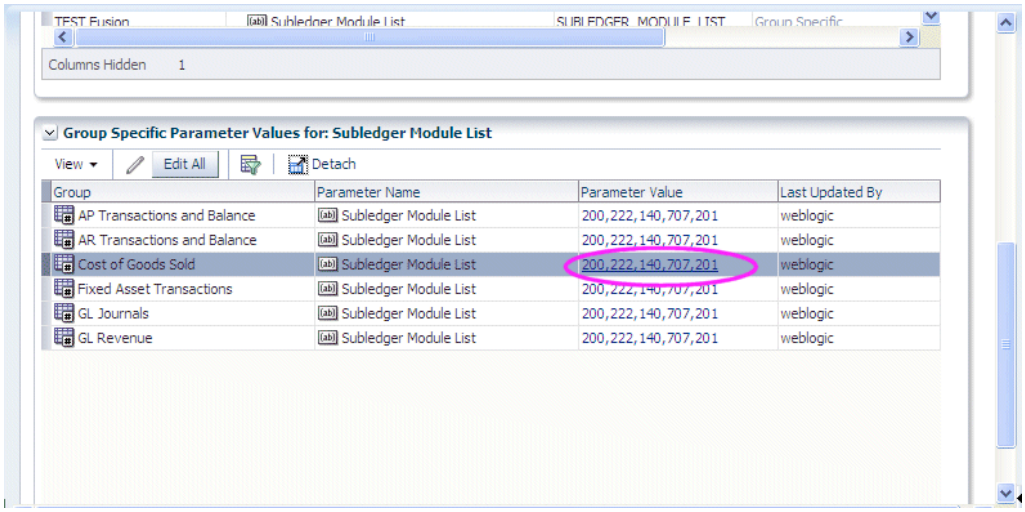
   - To update a Global parameter, in the **Data Load Parameters** list click the value displayed in the **Global Parameter Value** field to display the Edit Parameter Value

Dialog (Data Load Parameters), and edit the value. Alternatively, select the row and click the **Edit** icon.

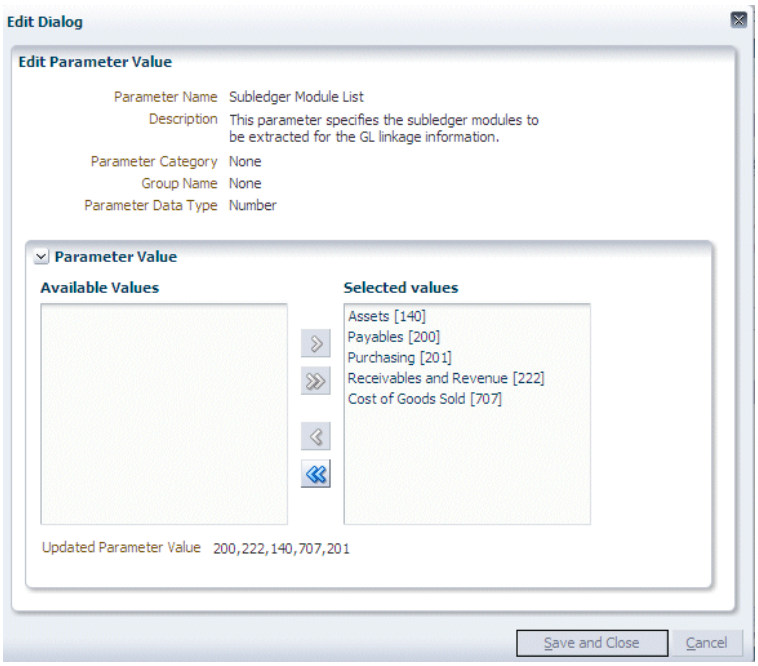


If a Global parameter is associated with Fact Groups or Dimension Groups, you can override the Global value for specific Fact Groups or Dimension Groups by editing the parameter value in the **Group specific Parameter Values for** pane.

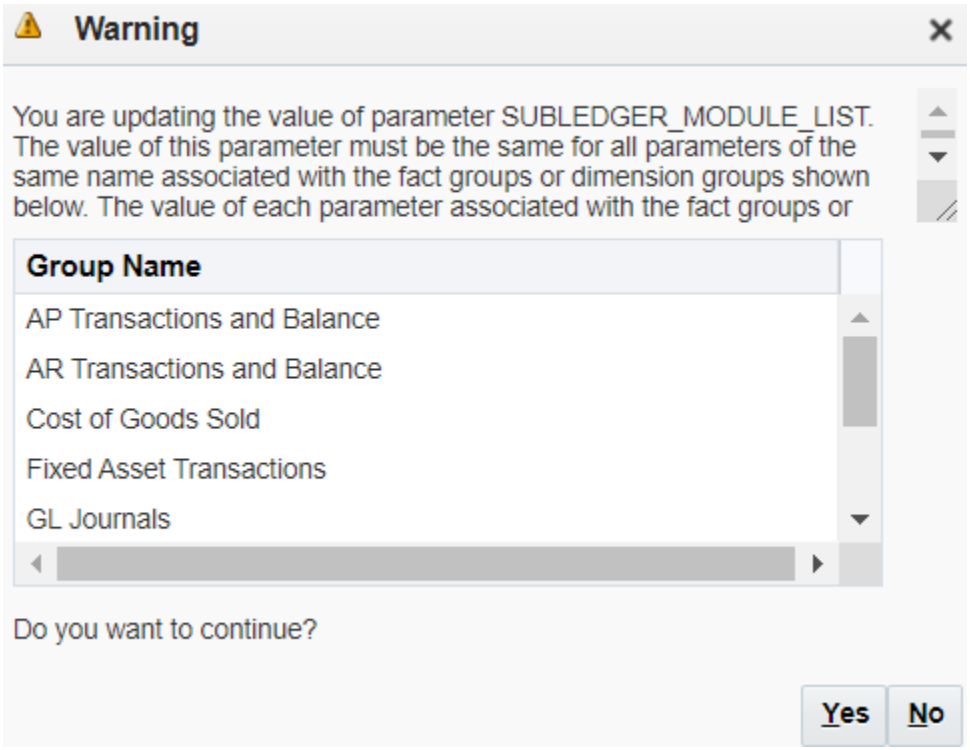
- To update an Application Specific parameter, select the parameter in the Data Load Parameters list, scroll down to the **Group Specific Parameter Values for** list, and click either the Edit icon, or the value in the Parameter Value column (or select the parameter row and click the **Edit** icon).



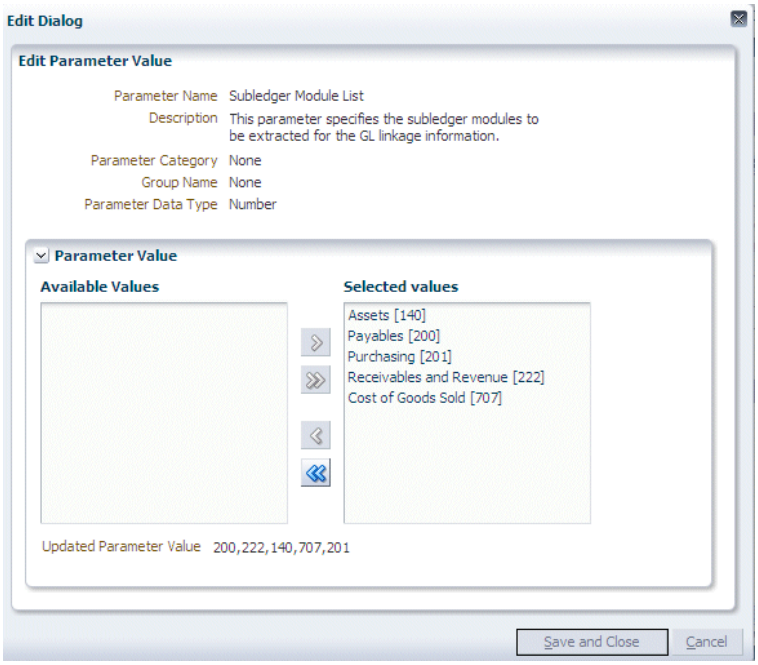
If the parameter is overridable at the Group level, then you update only that specific Fact Group or Dimension Group using the Edit Parameter Value dialog.



If the parameter is Non-Overridable at the Group level, then a Warning dialog displays a list of Fact Groups and Dimension Groups that will be affected if you click Yes to edit the value.



- To update the parameter value for all Fact Groups and Dimension Groups in the **Group Specific Parameter values for** list, click **Edit All** to display the Edit Parameter Value dialog.



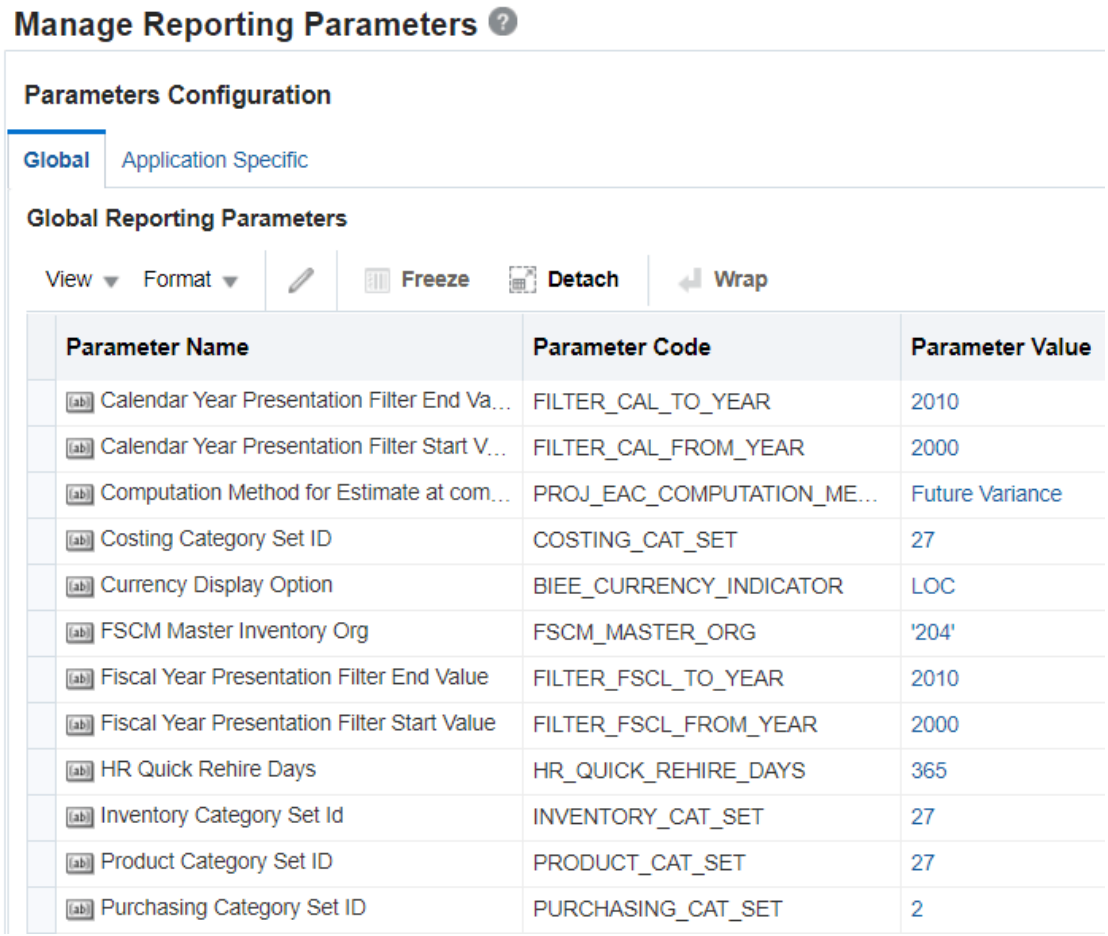
About Working With Reporting Parameters

Reporting Parameters are configuration values that specify how data is presented in Business Intelligence dashboards.

There are two categories of Reporting Parameter:

- Global, which apply to all applications. These are displayed on the Global tab.
- Application Specific, which apply to specific applications. These are displayed on the Application Specific tab.

You manage and edit Reporting Parameters using the Manage Reporting Parameters: Global/Application Specific tab.



You display the Manage Reporting Parameters: Global/Application Specific tab by doing one of the following:

- In Configuration Manager, select the **Manage Reporting Parameters** link in the Tasks pane.
- In FSM, select the **Go to Task** link for a Task that updates a Reporting Parameter.

To edit a Reporting Parameter, select the parameter in the parameter list, then either click the **Edit** icon, or click the value in the Parameter Value column.

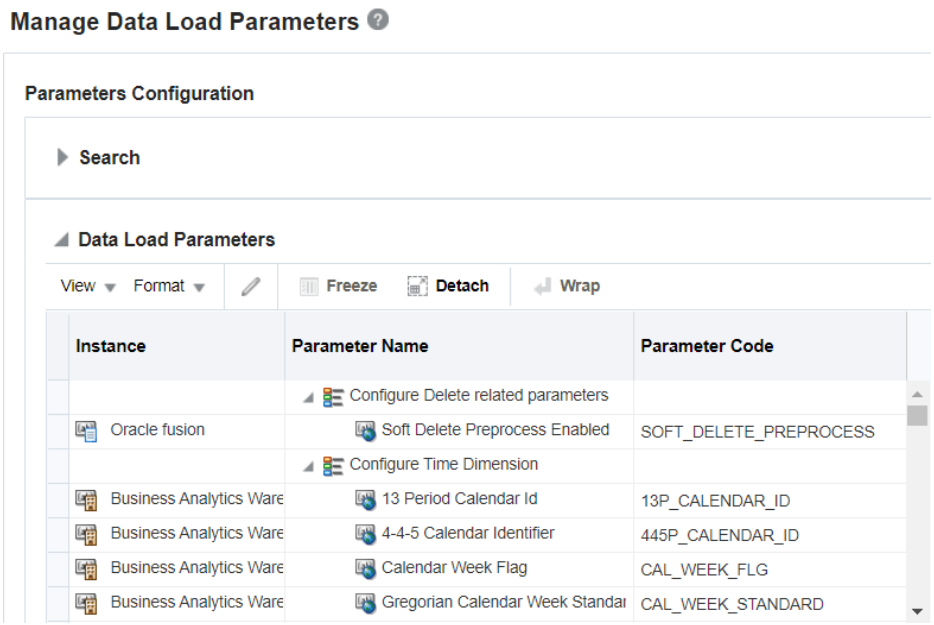
About Monitoring Setup Data

During a functional configuration project, you monitor Setup Data to ensure that your Offerings are being correctly configured. For example, you might use the Parameters By Offerings report on the Overview page to visually monitor the number of parameters that have been configured.

You can monitor the setup data in the following ways:

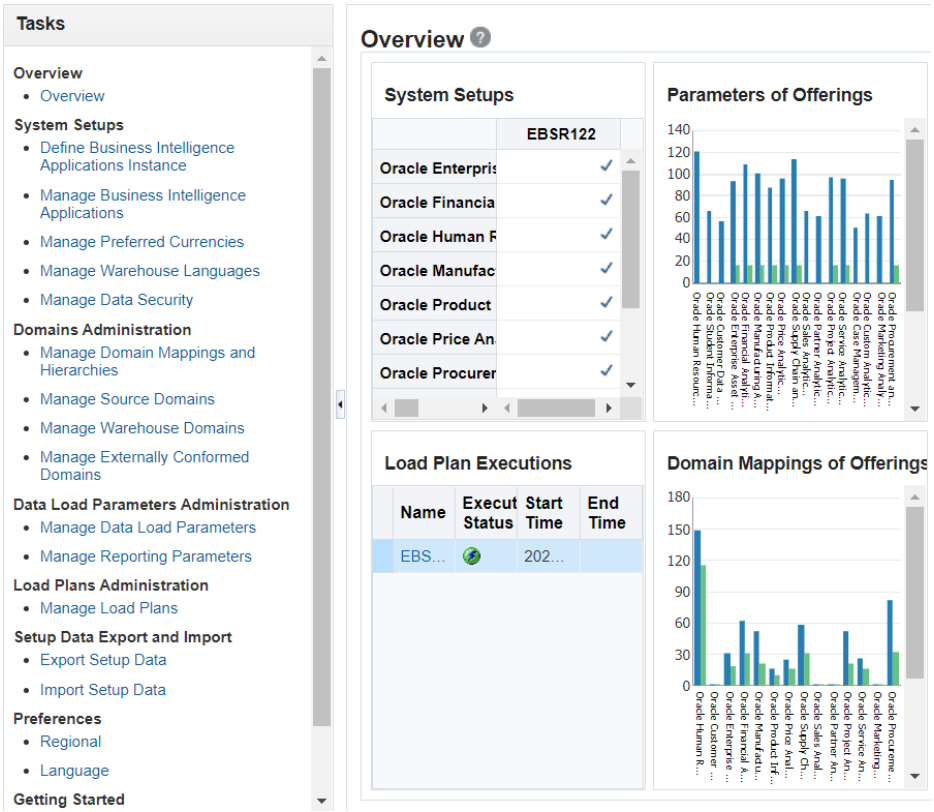
- In Configuration Manager, you can monitor the status of the underlying set up data values, as follows:
  - Use the pages and tabs in the Setup Data Maintenance and Administration area on the Tasks bar.

From the Tasks bar, select one of the links in the Setup Data Maintenance and Administration area. For example, select the Manage Data Load Parameters link to display the Manage Data Load Parameters page.



– Use the Reports panes on the Overview page.

For example, you might use System Setups list to monitor which Offerings have been enabled for deployment.

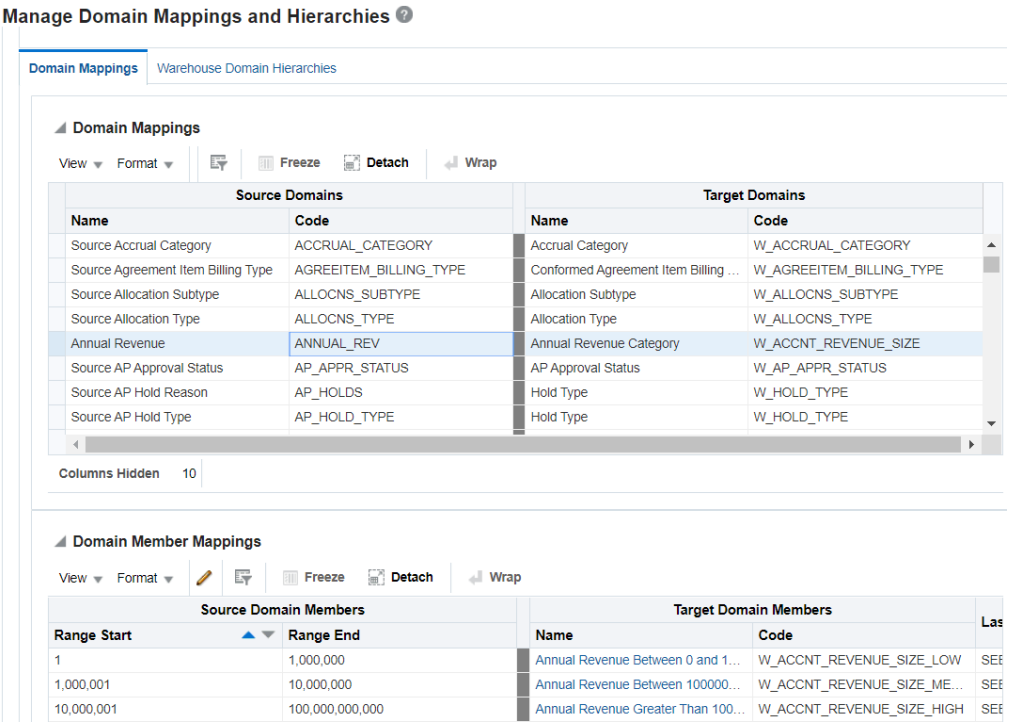


Changing Configuration Values Using Configuration Manager

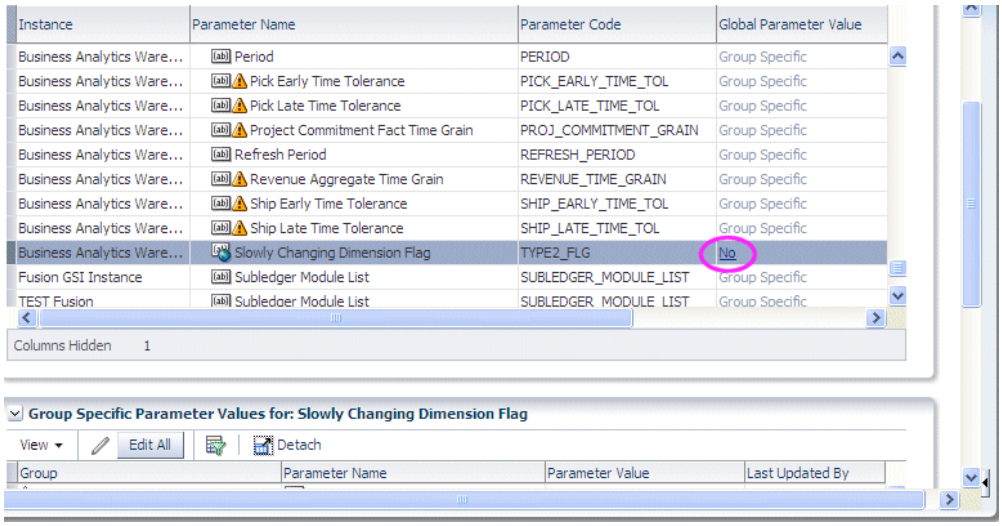
If you need to make configuration changes after an Implementation Project has been completed in FSM, you can use Configuration Manager to update setup data.

To change setup data values, you use the options in the Setup Data Maintenance and Administration area on the Tasks bar.

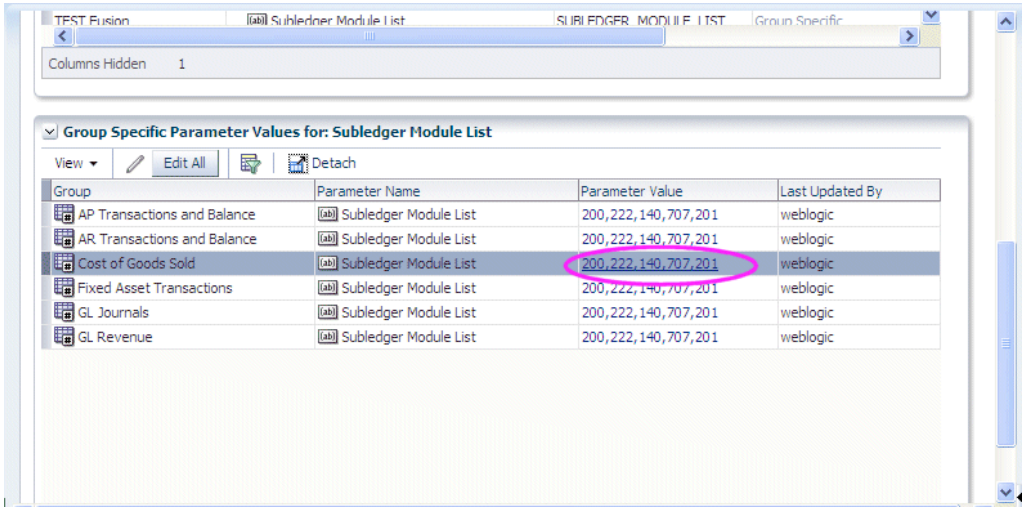
- In Configuration Manager, use options in the Setup Data Maintenance and Administration area on the Tasks bar:
  - To make changes to domain mappings, select **Manage Domains Mappings and Hierarchies** and display the tab for the domain type that you want to edit. To edit a Domain Mapping, select a domain in the Domain Mapping list and click the **Edit** icon in the Domain Member Mappings pane.



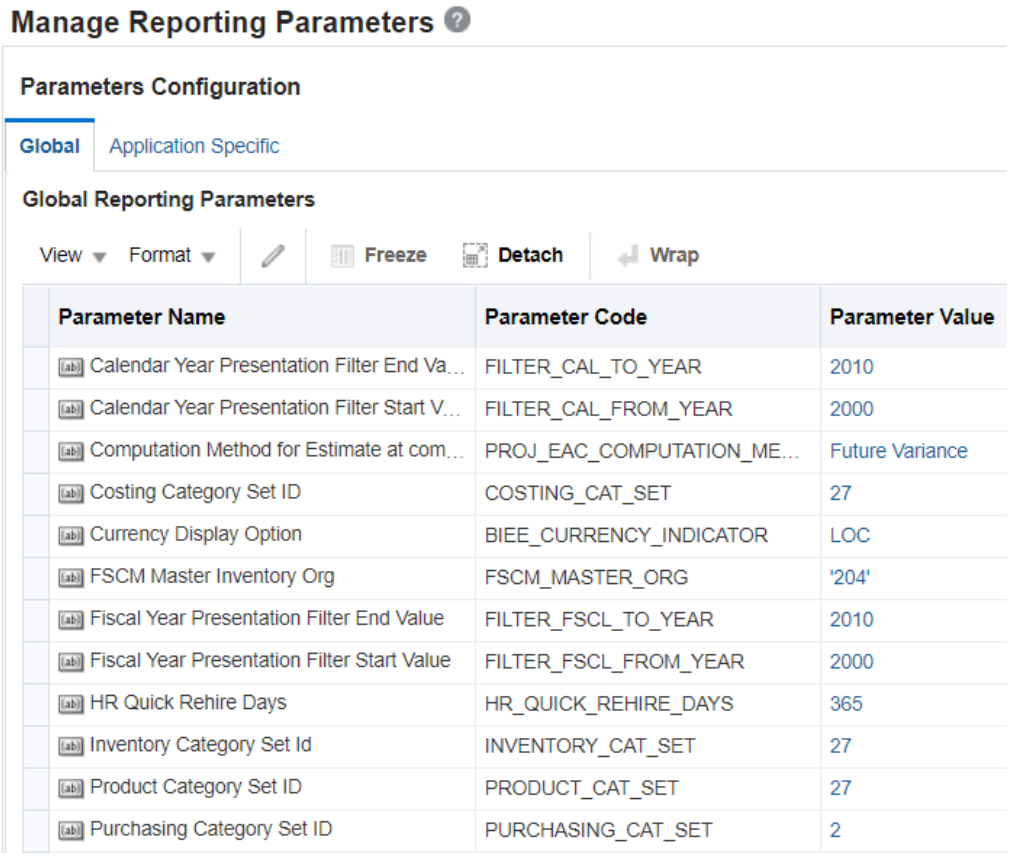
  - To make changes to data load parameters, select **Manage Data Load Parameters** and use the Search pane to locate the parameters that you want to edit. To edit the value of a Global Data Load Parameter, click the value in the **Global Parameter Value** column (or select the row then click the **Edit** icon).



For Application Specific parameters, select the parameter in the Data Load Parameters list, scroll down to the Group Specific Parameter Values for list, and click either the **Edit** icon or the value in the Parameter Value column (or select the parameter row and click the **Edit** icon).



- To make changes to reporting parameters, select **Manage Reporting Parameters**, and display either the Global tab or the Application Specific tab. To edit the value of a Reporting Parameter, click the value in the Parameter Value column (or select the row then click the **Edit** icon).



Tip:

To locate unmapped domain values, see Locating Unmapped Domain Values in Configuration Manager.

Locating Unmapped Domain Values in Configuration Manager

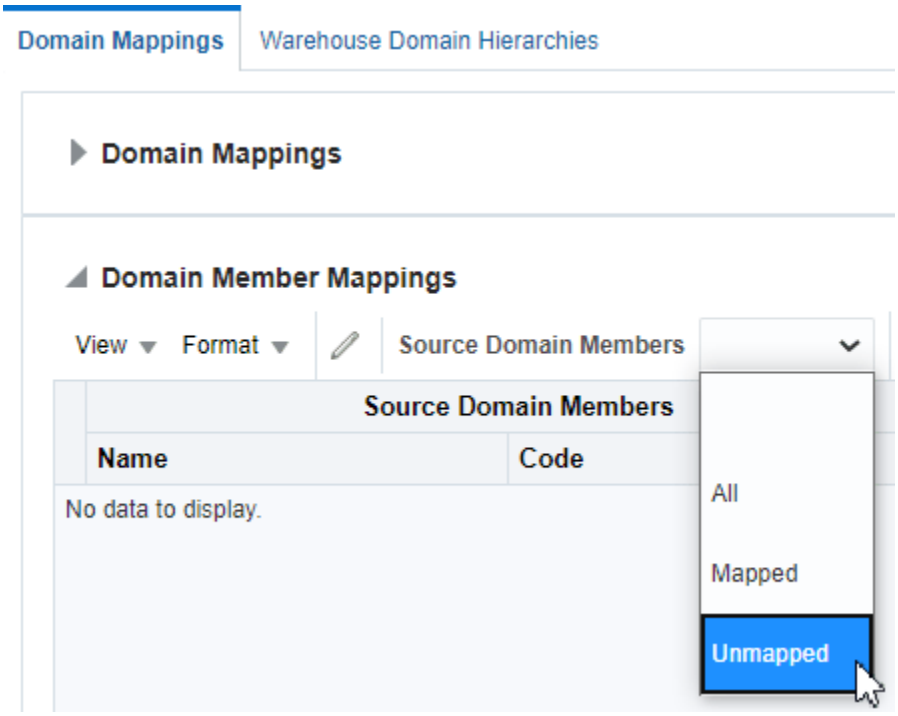
You locate unmapped Domain Values to enable you to make sure that you have mapped all of your source system domain values.

You can also use the Alerts pane on the Overview page in Configuration Manager to identify target domains with one or more unmapped source members. Display the Overview page, and navigate to the Domain Maps with Unmapped Source Members pane.

1. Start Configuration Manager.
2. Do one of the following:
   - From the Tasks bar, select **Manage Domains and Mappings** to display the Manage Domains and Mappings dialog.

     Display the Manage Domain Mappings and Hierarchies: Domain Mappings tab.

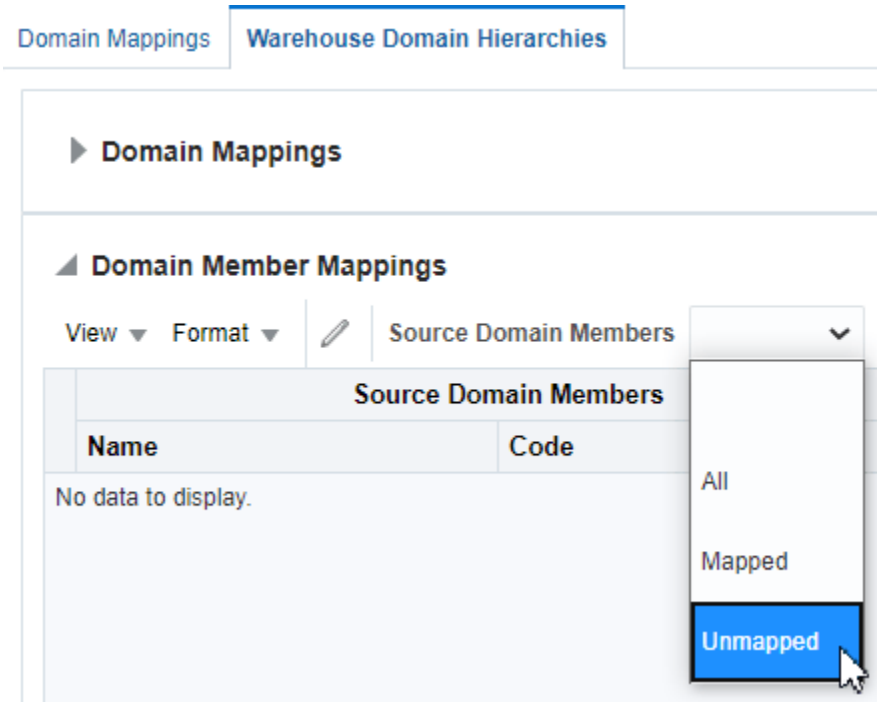
     In the Domain Member Mappings pane, select **Unmapped** from the **Source Members** list.



- From the Tasks bar, select **Manage Domains and Mappings** to display the Manage Domains and Mappings dialog.

  Display the Manage Domain Mappings and Hierarchies: Warehouse Domain Hierarchies tab.

  In the Domain Member Mappings pane, select **Unmapped** from the **Source Members** list.



Locating Data Load Parameters with No Values in Configuration Manager

You locate Data Load Parameters with no values to check all Tasks in FSM relating to Data Load Parameters have been completed correctly.

1. Start Configuration Manager.
2. Do one of the following:
   - From the Overview page, use the **Data Load Parameters with no Values** list in the Alerts pane.
   - From the Tasks bar, select **Manage Data Load Parameters** to display the Manage Data Load Parameters dialog, which enables you to view and edit parameters.

Adding Target Domain Members

You add Target Domain Members to extend Oracle Business Analytics Warehouse.

For example, you might want to create a new salary category called 'Range 5' so that you can map salary values to this new category.

1. Display the Warehouse Domains tab.

   In FSM, the Warehouse Domain tab is displayed when you perform a Task that edits a Warehouse Domain value.

   In Configuration Manager, from the Tasks bar, select **Manage Domains Mappings and Hierarchies** to display the Manage Domain Mappings and Hierarchies dialog.
2. In the Domain Member Mappings pane, click **Add Warehouse Domain Member** to display the Add Warehouse Domain Member/Add Target Domain Member dialog.
3. Use this dialog to specify the details.
4. Click **OK** to save the details and close the dialog.

About Exporting and Importing Setup Data for Configuration Manager

You export and import the setup data Data for Configuration Manager.

You export and import the setup data to:

- Make a backup of your configuration settings for security purposes. For example, you might keep a record of the configuration changes that you have made.
- Migrate the setup data for Configuration Manager from one environment to another environment. For example, you might move the configuration changes that you have made from a Test environment to a Production environment.

What Data is Exported?

When you export the setup data, you export the changes that you have made to the values of the following objects:

- Data Load Parameters
- Domains and Mappings
- Reporting Parameters

You export all changes that are different from the default values each time. The export process does not export the unchanged configuration values. In other words, if you only change the value of DEFAULT_CURRENCY from USD to Euro and then you export your data, then the export ZIP file that is produced will only contain columns for 'DEFAULT_CURRENCY=Euro'.

> **Note:**
>
> Other Configuration Manager details such as the configuration settings of the source system and Oracle Business Analytics Warehouse aren't included in the export files. In other words, before you import on the target system, you must first respecify the source system and Oracle Business Analytics Warehouse. Also, externally conformed domains aren't exported.

What Data is Imported?

When you import the setup data from a ZIP file, you import whatever configuration changes were exported to that ZIP file. For example, if you first export only Reporting Parameters to a ZIP file, then you import only the changes that were made to Reporting Parameters.

About Migrating Setup Data

To migrate the setup data, you do the following:

- In the source environment, export the Configuration Manager setup data as a ZIP file. See Exporting Setup Data.
- Copy the ZIP file from the source environment to the target environment.
- In the target environment, import the Configuration Manager setup data from the ZIP file. See Importing Setup Data.

> **Note:**
>
> For a successful migration, the data source number (DSN) in the target system must be the same as the DSN in the source system.

About Backing Up Setup Data

To back up the setup data, you do the following:

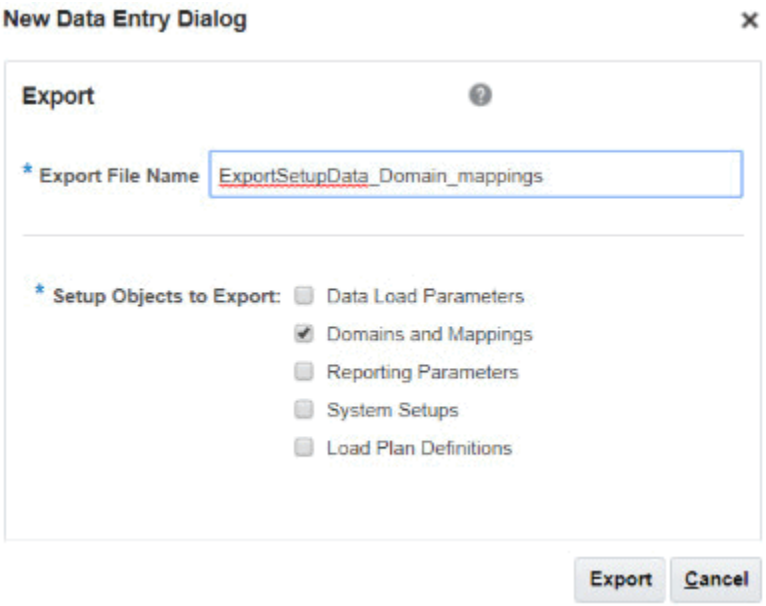
- In the source environment, export the Configuration Manager setup data as a ZIP file.
- Store the ZIP file in a secure location.
- In the target environment, make sure that you have installed Configuration Manager, which installs the default setup data. The data source number in the target system must be the same as the data source number in the source system.

- To restore the backed up data, you import the Configuration Manager setup data from the ZIP file.

Exporting Setup Data

You can export the setup data to back up or migrate a Configuration Manager environment.

1. In the source environment, start Configuration Manager.
2. From the **Tasks** bar, select **Export Setup Data** to display the Export Setup Data dialog.
3. In the Export Setup Data dialog, click the **Export** icon to display the Export Data dialog.
4. Specify the setup objects that you want to export.



5. Click **Export**.
6. When the File Download dialog is displayed, click **Save** to save the ZIP file to a location that you specify.

   If you first click **Open** at the File Download dialog to open the ZIP file, then make sure that you save the ZIP file in the ZIP program that you are using.

The Export Setup Data table is updated with the export details.

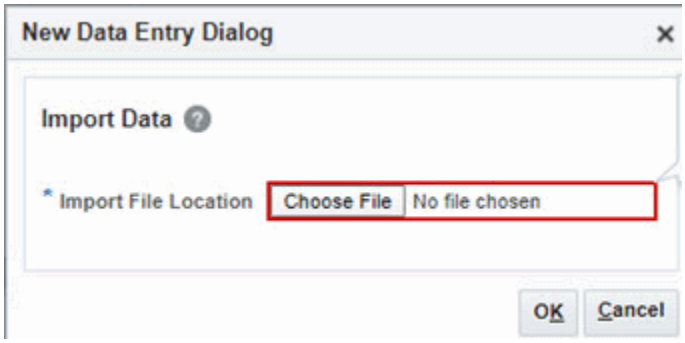
Importing Setup Data

You import the setup data to restore or migrate the setup data. Before you import the setup data, you must copy the previously exported ZIP file to a file location that is accessible from the machine that is running the Configuration Manager client.

When you import the setup data, the data source number in the target system must be the same as the data source number in the source system.

1. In the source environment, start Configuration Manager.
2. From the **Tasks** bar, select **Import Setup Data** to display the Import Setup Data dialog.

3. In the Import Setup Data dialog, click the **Import** icon to display the Import Data dialog.



4. Specify the location and name of the ZIP file that contains the configuration changes that you want to import.
5. Click **OK**.

The setup data is imported from the ZIP file, and the Import table is updated with the details.

Customizing a Product Hierarchy

You can customize product hierarchies by associating Dimension Groups or Fact Groups with Offerings and Functional Areas.

1. From the Tasks bar, select **Manage Business Intelligence Application Offerings**.
2. In the Business Intelligence Application Offerings list, select the Offering that you want to customize.
3. In the Associated Fact and Dimension groups area below, do one of the following:
   - To add a Fact Group, choose Actions, then Create Fact Group to display the Create/Edit Fact Group dialog.
   - To add a Dimension Group, choose Actions, then Create Fact Group to display the Create/Edit Dimension Group dialog.
4. If necessary, use the **Edit** and **Delete** options to modify the Dimension Groups or Fact Groups that you have added.

> **Note:**
>
> You can only edit or delete Fact Groups or Dimension Groups that you have created. You cannot edit or delete default groups that are provided on installation.

A

Integrating with Oracle Data Relationship Management to Enable Custom Hierarchies

By default, Oracle E-Business Suite does not support creation of a hierarchy for the Business Unit (BU) dimension. You can create a custom hierarchy for the Business Unit dimension by integrating Oracle Business Intelligence Applications (Oracle BI Applications) with Oracle Data Relationship Management (Oracle DRM).

A hierarchical structure in a dimension table enables users to drill up and down the data when viewing reports. By creating and maintaining grouping nodes of a detail tree in Oracle DRM, you can create a hierarchy for the business unit data that is gathered from different E-Business Suite instances.

Prerequisites

In the Oracle DRM environment:

- Ensure that the Oracle DRM Server is up and running.
- Install an application template for Oracle BI Applications with the Oracle DRM server installation. The template file, biapps-app-template.xml, is available in the /app-templates subdirectory within the Oracle DRM installation directory. This template contains predefined DRM metadata, such as properties, categories, validations, node types, and exports. Use the Data Relationship Management Migration Utility to load the template into a DRM application. After the template is loaded, you can modify the application metadata from the template to support custom requirements.

In the Oracle BI Applications environment:

- In Oracle BI Applications Configuration Manager (Configuration Manager), enable the functional setup task "Configure Data Load Parameters for Oracle Data Relationship Management Tool Integration".
- In Functional Setup Manager (FSM), perform the task "Configure Data Load Parameters for Oracle Data Relationship Management Tool Integration".
- Run the Oracle BI Applications Generated Load Plan at least once.

Creating a Custom Hierarchy

> **Note:**
>
> This procedure lists the high-level steps only.

1. Use an Import Profile provided in the Oracle DRM application template to import Business Unit data from Oracle BI Applications into Oracle DRM.
2. Create a custom hierarchy with this data by referring to the Oracle DRM product documentation.

> **Note:**
>
> - It is recommended that you create custom hierarchies in DRM in a separate version and not in the version that was imported.
> - Do not use Business Unit IDs as names for nodes in Oracle DRM. It is recommended that you use some prefix with the Oracle DRM node names to help distinguish them from the Business Unit IDs.

3. Use an Export Profile provided with the Oracle DRM application template to export Business Unit data from Oracle DRM to Oracle BI Applications.
4. In Configuration Manager, run the Oracle BI Applications Generated Load Plan. This brings the custom BU hierarchies in the Internal Organization dimension, which can then be used for reporting.
5. Customize the repository file by adding the Business Unit Logical Hierarchy as a Presentation Hierarchy in the required Subject Area.