

Oracle® Cloud

Implementing Oracle Fusion Analytics Warehouse



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Primary Author: CEAL Team

Contributors: User Assistance Team

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Preface

Learn how to implement Oracle Fusion Analytics for the first time.

Audience

This document is intended for IT administrators, power business analysts, and stakeholders who are about to implement Oracle Fusion Analytics for the first time.

Documentation Accessibility

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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

These related Oracle resources provide more information.

- Oracle Cloud <http://cloud.oracle.com>
- Getting Started with Oracle Cloud
- [Managing and Monitoring Oracle Cloud](#)
- Using Oracle Fusion Analytics Warehouse
- Getting Started with Oracle Analytics Cloud
- Visualizing Data and Building Reports in Oracle Analytics Cloud
- Preparing Data in Oracle Analytics Cloud

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.
<i>italic</i>	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

Introduction

Let's explore the concepts and procedures you need to implement Oracle Fusion Analytics Warehouse (Fusion Analytics).

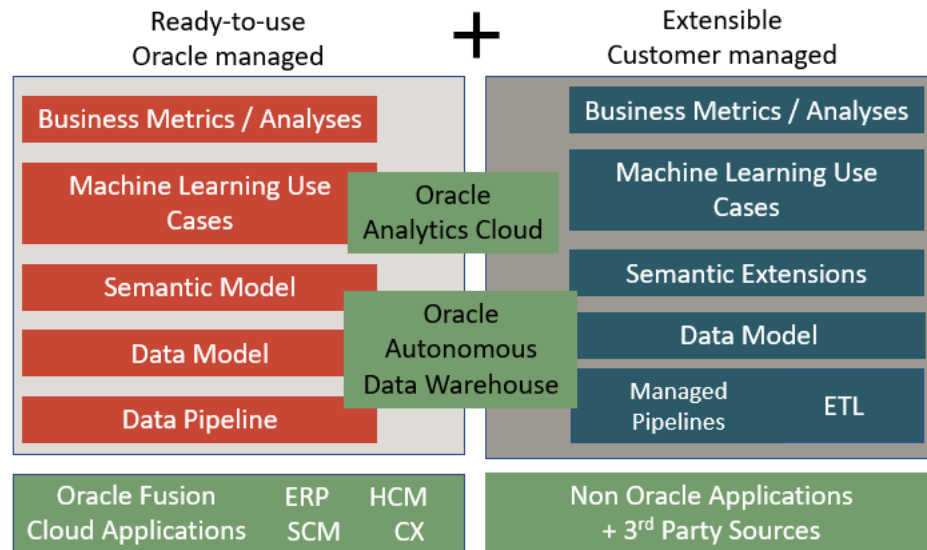
Topics:

- [About Fusion Analytics](#)
- [Learn About Fusion Analytics](#)
- [About this Guide](#)
- [Implementation Cheatsheet](#)

About Fusion Analytics

Fusion Analytics is a set of prebuilt, cloud-native analytics applications for Oracle Fusion Cloud Applications that provide line-of-business users with ready-to-use insights to improve decision-making.

Powered by Oracle Autonomous Data Warehouse and Oracle Analytics Cloud, it offers a library of over 2000 ready-to-use, best practice key metrics across HR, finance, supply chain, and customer experience to make quick and collaborative decisions.



You gain a ready-to-use, single analytics data model for all your Oracle Fusion Cloud Applications data that is extensible to include any external data. You can predict how business processes affect company goals by leveraging ready-to-use machine learning to predict business outcomes, mitigate risk, and detect anomalies.

Review these:

- [Fusion Analytics](#)
- [About Oracle Fusion Analytics Warehouse](#)

Learn About Fusion Analytics

Oracle offers many ways to learn about Fusion Analytics.

See [Trainings](#).

About this Guide

This guide enables you to consider, plan, and complete your first implementation of Fusion Analytics for all your business users.


It leverages experiences from successful implementations and provides practical guidance on all phases of the implementation in the form of best practices, recommendations, considerations, references, and required resources. You can follow the same practices to expand beyond your initial implementation.

In the Resources section, you'll find handy resources such as recommended training and links to useful information. See [Resources](#). This section also has checklists for each activity to help you assess the status of activity completion and capture activity details. See [Checklists](#).



Note:

If you're looking for an accelerated rollout of the ready-to-use content to your business, then see [Gather Basic Information and Determine the Implementation Approach, Team, and Partner](#).

An icon, , in a section heading denotes that the section is part of an accelerated, phased rollout approach.

Implementation Cheatsheet

Use the implementation cheatsheet table as a quick reference to understand the stages in a Fusion Analytics implementation and plan accordingly.

The following table displays the implementation process in its entirety.

Sequence	Stage	Tasks	More Information
1	Strategy and Training	<p>This stage includes these tasks:</p> <ul style="list-style-type: none"> Identify the implementation team Identify the implementation rollout strategy Identify the requirements Sign-off the scope and project timelines Define change management and support processes Identify trainings for the implementation team and business users Discuss need for a partner and identify a partner 	<p>See:</p> <ul style="list-style-type: none"> Gather Basic Information and Determine the Implementation Approach, Team, and Partner Define the Business Requirements and Use Cases Create the Project Plan Set Up the Support Process Trainings
2	Foundation	<p>This stage includes these tasks:</p> <ul style="list-style-type: none"> Pair Oracle Fusion Cloud Applications environment with the Fusion Analytics environment Use the same cloud account for Oracle Fusion Cloud Applications and Fusion Analytics Use the region that hosts Oracle Fusion Cloud Applications Decide on the compartment for Fusion Analytics 	<p>See:</p> <ul style="list-style-type: none"> Environment Pairing Compartments

Sequence	Stage	Tasks	More Information
3	Preparation and Provisioning	<p>This stage includes these tasks:</p> <ul style="list-style-type: none"> • Activate Fusion Analytics subscription • Configure single sign-on • Prepare Oracle Fusion Cloud Applications • Prepare to deploy Fusion Analytics privately (Optional) • Create Fusion Analytics instance (public or private) 	<p>See:</p> <ul style="list-style-type: none"> • Prepare for Implementation • Prepare Your Oracle Fusion Cloud Applications • Create an Instance • Overview of Private Fusion Analytics
4	Configuration and Customization	<p>This stage includes these tasks:</p> <ul style="list-style-type: none"> • Configure Fusion Analytics with private endpoints, if using • Configure Fusion Analytics (ready-to-use rollout) • Customize Fusion Analytics (tailored rollout) 	<p>See:</p> <ul style="list-style-type: none"> • Configure and Validate • Customize
5	Migration	<p>This stage includes these tasks:</p> <ul style="list-style-type: none"> • Finalize configuration • Finalize customization • Generate and migrate bundles 	<p>See:</p> <ul style="list-style-type: none"> • Migrate
6	Testing Strategy	<p>This stage includes these tasks:</p> <ul style="list-style-type: none"> • Validate data • Test functionality • Test performance • Complete user acceptance testing 	<p>See:</p> <ul style="list-style-type: none"> • Test
7	Go Live Readiness	<p>This stage includes these tasks:</p> <ul style="list-style-type: none"> • Evaluate the project • Evaluate the requirements • Evaluate the success criteria • Evaluate the customizations 	<p>See:</p> <ul style="list-style-type: none"> • Plan the Go Live Activities

Sequence	Stage	Tasks	More Information
8	Go Live and Post Go Live	<p>This stage includes these tasks:</p> <ul style="list-style-type: none">• Prepare the production environment• Engage and train end users• Communicate the go live date in your organization• Schedule the roll out• Engage Oracle Support, if required• Utilize community and forums• Keep the troubleshooting information handy	<p>See:</p> <ul style="list-style-type: none">• Plan the Post Go Live Activities

2

Plan the Implementation Process

A well-thought out implementation strategy is key to a successful implementation.

Your implementation strategy must cover these:

- Planning activities
- Rollout approaches
- Team roles
- Basic information needs
- Requirements
- Success criteria
- Timelines

Topics:

- [Gather Basic Information and Determine the Implementation Approach, Team, and Partner](#)
- [Define the Business Requirements and Use Cases](#)
- [Determine the Success Criteria](#)
- [Create the Project Plan](#)
- [Set Up the Support Process](#)
- [Manage Application Updates](#)

Gather Basic Information and Determine the Implementation Approach, Team, and Partner

A Fusion Analytics implementation comprises a broad spectrum of decisions and determinations. Save valuable time and prevent errors by carefully planning the implementation.

The most important decisions are the implementation cloud account and approach.

Based on experience working with hundreds of enterprise customers, Oracle recommends using the Oracle Fusion Cloud Applications cloud account and an accelerated phased rollout approach. This cloud account saves time and expenses and minimizes complexity when setting up the security integration between Fusion Analytics and Oracle Fusion Cloud Applications. The accelerated phased rollout approach allows early feedback from business users, minimizes complexity, quickly provides administrators with end-to-end implementation experience, and provides a baseline for customization requirements.

Important decisions include:

- Implementation approach

- Implementation team
- Implementation order
- Initial training
- Partner selection
- Activation - who, what, and where

Gather the essential basic information about:

- The Fusion Analytics order
- Identity management usage
- Oracle Fusion Cloud Applications environments
- Oracle Cloud Infrastructure
- The Fusion Analytics initial application and functional area

Refer to [Plan the Implementation of Oracle Fusion Analytics](#) for detailed guidance.

Define the Business Requirements and Use Cases

Define the business requirements and use cases to state the project's business needs and success criteria clearly.

Ensure that the requirements and use cases identify the critical business processes and the plan to monitor these processes. You must specify the functional and non-functional requirements in your implementation plan.

This task requires:

- Business Users
- Project Manager
- Business Leads

Define the Functional Requirements

Establish the business objectives to determine the success criteria and measure the success of your Fusion Analytics solution.

The implementation team must identify all the functional requirements and get approval from all the stakeholders to ensure that the project team fully understands what is required to be built. It's also important to agree upon the testing scenarios for each of the functional requirements.

Follow these steps to determine the business objectives:

- Review the end-to-end process maps with the Oracle Fusion Cloud Applications functional administrator for each area. Agree on the analytical reporting requirements and how they're measured.
 - Determine the business metrics that you want to monitor.
 - Agree on the analytical workbooks functionality that complements the business metrics and provides further insight into the process.
 - Agree on the applicable security setup such as permissions and data restrictions.

- Confirm the data sources for each reporting area.
- Agree on the frequency of the data load required to meet the reporting requirements.
- Map the Fusion Analytics modules to the configured Oracle Fusion Cloud Applications modules. You must ensure that the Fusion Analytics modules that you plan to activate relate to the Oracle Fusion Cloud Applications functional modules. This enables the data pipelines to function effectively.
- Do a fit-gap analysis to identify the gaps in the solution and initiate the conversation to remediate the feasibility gaps.
- Document these requirements and test them during the appropriate test phase of the project.

Use the checklist to confirm that the action items are planned for. See [Define the Functional Requirements Checklist](#).

Define the Non-Functional Requirements

Non-functional requirements are related to the Fusion Analytics system functionality and how Fusion Analytics is expected to perform.

Consider the non-functional requirements such as performance, security, and reliability in your implementation plan. Identify all non-functional requirements and ensure that all senior stakeholders on the project, ranging from the business community to the security teams agree on these requirements. Based on the documented non functional requirements inventory, ensure that you check for the Oracle Fusion Cloud Applications source objects that don't have the corresponding view objects available for reporting. Flag these technical gaps during the early stages of implementation to accommodate the turn around time required for implementing enhancement requests in Oracle Fusion Cloud Applications. This will ensure that the project team fully understands the non-functional objectives and how these are measured. It's also important to agree upon the testing scenarios for each of the non-functional requirements. Document these requirements and test them during the appropriate test phase of the project.

Use the checklist to confirm that the action items are planned for. See [Define the Non-Functional Requirements Checklist](#).

Define the Use Cases

Use cases describe the interaction between Fusion Analytics and the user to achieve a business process goal.

Identify all use case requirements and ensure that all stakeholders agree on them. The use cases can be related to an agreed business process map such as:

- Steps to create and deploy business metrics to a new or existing workbook.
- Steps to create new application roles and assign them to groups and users.
- Steps to monitor business metrics and related workbooks for a particular business process, such as monitoring headcount turnover.

Document the use cases to ensure that the project team fully understands the objectives and how these use cases would be fulfilled.

Determine the Success Criteria

The success of your Fusion Analytics implementation heavily relies on you choosing the proper criteria.

This enables you to evaluate and determine the working practices you need to continue working on and improve in the future. You must've qualitative and quantitative ways of determining your project's success. Track the following to measure the success of the implementation:

- Scope – Identify and achieve the intended results of the implementation.
- Schedule – Ensure that all the milestones are met with ample time for contingencies.
- Budget – Ensure that the project is delivered within the estimated cost.
- Satisfaction - Ensure that the key stakeholders are satisfied with the implementation.

This task requires a project manager.

Use the checklist to confirm that the action items are planned for. See [Determine the Success Criteria Checklist](#).

Create the Project Plan

As a project manager, create the project plan with clearly defined project milestones.

Communicate these milestones to the implementation team to enable the team to understand and plan for interdependencies of external IT systems within the organization landscape. Ensure that each of the milestones have a clear breakdown of tasks. Map the activities to specific resource ownership to effectively track the execution and progress of implementation activities.

Align the project implementation plan activities with the phased approach tasks. Ensure that the project timelines include additional time to cover pipeline activations, initial data loads, and any issues found. Plan for contingencies during the testing cycles and go-live preparation.

You may choose to create plans for quick or standard implementations based on your business requirements. Quick implementation is limited in scope, users, and may not involve customizations whereas a standard implementation goes through the entire implementation lifecycle.

□ Quick Implementation Plan

The following table explains the initial phase of a quick implementation plan:

Category	Task
Order and Activation	<p>Ordering tasks in this category are:</p> <ol style="list-style-type: none">1. Create a draft order with Oracle Sales.2. If no Universal Credits (UCC) subscription exists in the Oracle Fusion Cloud Applications cloud account, then add a Pay-as-you-Go (PAYGO) UCC subscription to the order.3. Add Fusion Analytics to the order.4. Place the order.5. Watch for welcome emails to the administrator's email address. <p>Activation tasks in this category are:</p> <ol style="list-style-type: none">1. Verify the prerequisites for order activation.2. If you ordered PAYGO UCC:<ol style="list-style-type: none">a. Activate it first into the Oracle Fusion Cloud Applications cloud account.b. Wait until you receive an activation confirmation email for UCC.3. Activate Fusion Analytics into the Oracle Fusion Cloud Applications cloud account.
Development and Production Environments	<p>Common tasks for both environments are:</p> <ol style="list-style-type: none">1. Synchronize Oracle Fusion Cloud Applications users and roles and enable single sign-on.2. Create a Fusion Analytics instance.3. Configure pipeline settings and activate the initial application functional area pipeline. Wait for the pipeline to complete.4. Configure initial reporting configurations.5. Configure initial security.<ol style="list-style-type: none">a. Assign initial Oracle Fusion Cloud Applications business users to the license groups.b. Create user credentials for the partner and Oracle resources.c. Assign internal, partner, and Oracle resources to system groups.d. Assign initial business users to appropriate security context values from the initial security context.6. Validate the ready-to-use functional area.<ol style="list-style-type: none">a. Validate the analytic content.b. Validate the data content.c. Validate content and data security assignments.

Category	Task
Development Environment	Tasks in this category are: <ol style="list-style-type: none">1. Perform user acceptance testing (UAT).2. Perform user training.3. Develop support procedures.
Production Environment	Tasks in this category are: <ol style="list-style-type: none">1. Have initial business users perform sanity checks on the initial content and data.2. Roll out to the remaining business users.

Standard Implementation Plan

The following table explains the standard implementation plan:

Category	Task
Order and Activation	Tasks in this category are: <ol style="list-style-type: none">1. Place the order.2. Verify the prerequisites for order activation.3. Activate the order.
Development	Tasks in this category are: <ol style="list-style-type: none">1. Verify the prerequisites for the Fusion Analytics applications.2. Synchronize the identity service and enable single sign-on.3. Create a development instance.4. Set up pipeline and reporting configurations.5. Activate the data pipelines.6. Set up the security assignments for the ready-to-use content.

Category	Task
Non-production Testing	Tasks in this category are: <ol style="list-style-type: none">1. Conduct user testing on the subject areas and metrics.2. Conduct user testing on the ready-to-use reports.3. Create reports.4. Document the testing feedback.5. Create and configure the additional testing instance (if purchased).6. Secure user acceptance testing sign off.7. Sign off for production connection.
Production	Tasks in this category are: <ol style="list-style-type: none">1. Upgrade the development instance to the latest application release level.2. Synchronize the identity service and enable single sign-on.3. Create a production instance.4. Set up pipeline and reporting configurations.5. Activate the data pipelines.6. Set up the security assignments for the ready-to-use content.7. Complete the pre-go-live activities.8. Roll out to business users.9. Complete the post go live activities.

This task requires a project manager.

Use the checklist to confirm that the action items are planned for. See [Create the Project Plan Checklist](#).

Set Up the Support Process

My Oracle Support is your initial point of contact for all product support needs.

If you encounter any issues with the product at any point in time, as a Fusion Analytics administrator, file an SR so that Oracle Analytics support can help you. The contact details of Oracle support are available in the Fusion Analytics Welcome email that you receive after Oracle processes your subscription order.

Review these:

- [My Oracle Support](#)
- [Customer Access Support](#)

- [How to Add a Support Identifier to a My Oracle Support User Account](#)
- [What to do now that you have your Support Identifier \[VIDEO\]](#)

This task requires a Fusion Analytics service administrator.

Use the checklist to confirm that the action items are planned for. See [Set Up the Support Process Checklist](#).

Manage Application Updates

As a service and functional administrator, ensure that you periodically check the Release Updates tile on the Console in Fusion Analytics for new releases and plan the update activities.

Fusion Analytics provides quarterly application updates with the control and flexibility to choose when to apply the updates within the scheduled auto-update date. Oracle applies any critical security patches automatically. These updates have zero downtime. The auto-update process updates the data model, immediately adds new content, and replaces existing content with the latest updates. The process preserves the activated functional area data pipelines and resets the functional area data pipelines in Saved or Scheduled status to the Saved status. See [About Application Updates and Update Your Application](#).

You can view the notifications displayed on the Data Configuration page when application updates are available for major releases (quarterly basis), patches (monthly basis), and emergency fixes (as needed). You must plan and communicate decisions on when you perform the updates. Ensure that the update activities align with your overall governance and compliance policies.

Use the checklist to confirm that the action items are planned for. See [Manage Application Updates Checklist](#).

3

□ Learn About Oracle Cloud Infrastructure Basics

Understand the essential components of Oracle Cloud Infrastructure that lay the foundation of a successful implementation.

Setting up the essential components requires:

Oracle Cloud Infrastructure Component	Resource
Cloud accounts	Cloud Account Administrator
Regions	Cloud Account Administrator
Identity services	Cloud Account Security Administrator and Fusion Analytics Cloud Account Security Administrator, if using two accounts
Environments	Fusion Analytics Cloud Account Administrator
Compartments	Fusion Analytics Cloud Account Administrator
Groups	Fusion Analytics Cloud Account Administrator
Policies	Cloud Account Administrator

Topics:

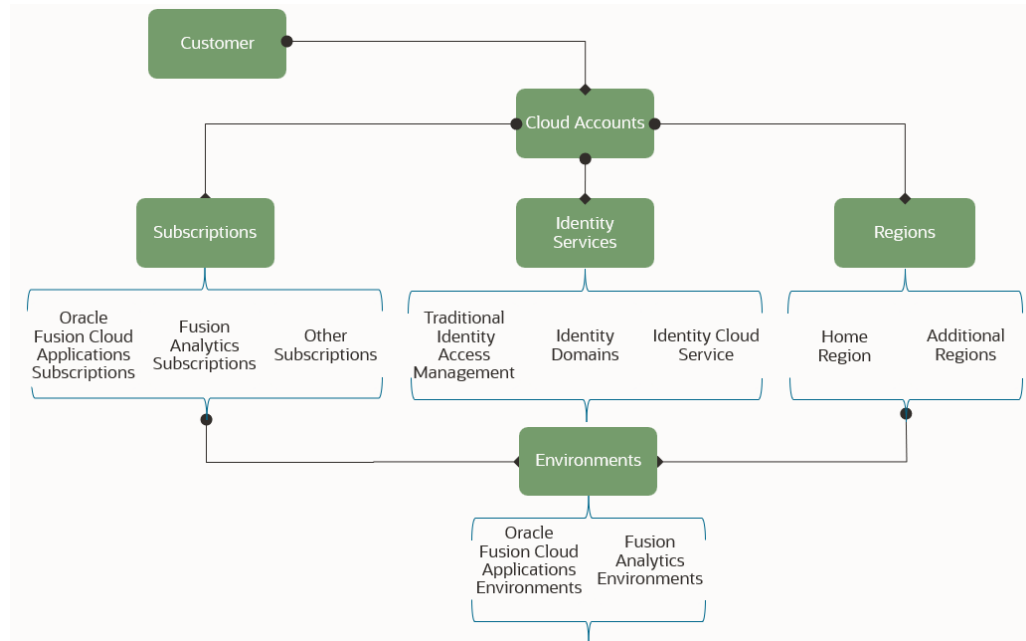
- [Cloud Accounts](#)
- [Regions](#)
- [Identity Services](#)
- [Environment Families and Environments](#)
- [Compartments](#)
- [Groups](#)
- [Policies](#)
- [Oracle Cloud Infrastructure Foundation](#)

Cloud Accounts

Cloud accounts enable organizations to access and utilize the Oracle Cloud services.

They provide a flexible and cost-effective way to build, test, and deploy applications and services on the cloud. The name "Cloud Account" is synonymous with tenancy. Cloud account is often used in Oracle Sales documents to order and activate cloud service subscriptions. The term tenancy is most often used in Oracle Cloud Infrastructure technical documents.

Oracle recommends using one cloud account for all cloud services. For Fusion Analytics, consider using the Oracle Fusion Cloud Applications cloud account. A single cloud account lowers administrative costs, provides synergies between all cloud services, and increases security. There is no way of imposing cross-cloud account policies or governance.



See [Cloud Accounts](#) and [Tenancies](#).

Use the checklist to confirm that the action items are planned for. See [Cloud Accounts Checklist](#).

Regions

An Oracle Cloud Infrastructure region is a localized geographic area that can be separated from other regions by vast distances across countries and continents.

Your cloud account has a home region, and you can subscribe to additional regions. The Oracle Cloud Infrastructure Console shows both subscribed and unsubscribed regions.

Know these components of regions:

- Region Infrastructures - Regions contain physical data centers. Some data centers contain the first generation of Oracle Cloud Infrastructure (generation 1 or Classic), whereas most data centers contain the second or later generations of Oracle Cloud Infrastructure (generation 2). Fusion Analytics instances exist in generation 2 regions and Oracle Fusion Cloud Applications instances exist in both generation 1 and 2 regions.
- Cloud Realms - Oracle Cloud regions are organized into separate cloud realms for customers with differing security and compliance needs. Realms are isolated from each other and share no physical infrastructure, accounts, data, resources, or network connections. Customer tenancies exist in a single realm and can only access regions that belong to that realm. The following realms are available:
 - Commercial Realm - These regions are accessible to any customer. Fusion Analytics instances exist in the commercial realm.
 - Sovereign European Union Realm - These regions are separated from the commercial regions and operate entirely within the European Union.

- US Government - These regions are isolated from commercial customers. Multiple realms are certified under different compliance standards for the US government. These regions support regulatory-compliant, mission-critical US public sector workloads.
- UK Government - These regions are designed in collaboration with multiple UK government and defense ministries. These regions are for the UK government and defense customers.

See [Regions and Realms](#).

Use the checklist to confirm that the action items are planned for. See [Regions Checklist](#).

Identity Services

Cloud accounts use either Oracle Identity Cloud Service or Oracle Cloud Infrastructure identity domains.

Fusion Analytics depends on identity service instances to:

- Manage users, groups, and application roles.
- Provide an integrated and synchronized single sign-on configuration.
- Provide user authentication and authorization services.

If you use a single cloud account for Oracle Fusion Cloud Applications and Fusion Analytics, then both use the same identity service and it eases administration.

See [Identity Cloud Service](#) and [Identity Domains](#).

Use the checklist to confirm that the action items are planned for. See [Identity Services Checklist](#).

Environment Families and Environments

Fusion Analytics and Oracle Fusion Cloud Applications provide environment families that are a set of production and non-production (test or development) environments.

An environment family is the set of environments a service uses in a cloud account. It eases administration of the environments within the family. It ensures environments are supported, upgraded, and patched at the proper times and levels.

An environment supplies a single management interface for the various services and a platform where services are provisioned. Environments are either production or non-production.

- Production Environment - The production environment supports your day-to-day real-time business operations by authorized users. An environment family is allotted one production environment.
- Non-Production Environments - Test and Development are examples of non-production environments. These can support the development of new capabilities and the final pre-production acceptance testing.

Fusion Analytics Environments

Fusion Analytics has one non-production environment and one production environment. You can subscribe to additional test environments for quality assurance and other needs such as pre-production staging of functionality and maintenance updates.

The default instances are named "Development/Test" and "Production". If you've an additional test environment, then Oracle names it "Additional Test Environment".

Use the checklist to confirm that the action items are planned for. See [Fusion Analytics Environments Checklist](#).

Oracle Fusion Cloud Applications Environments

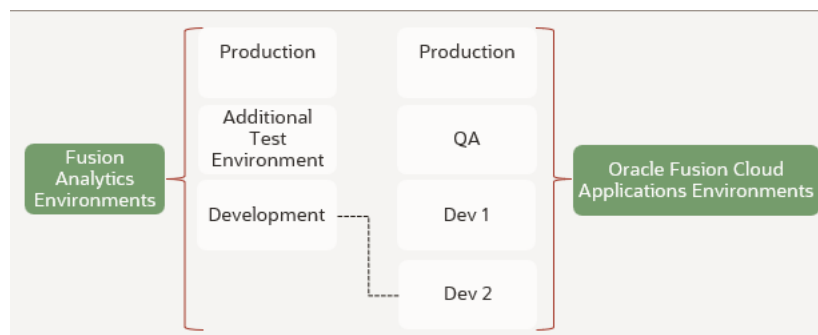
Oracle Fusion Cloud Applications environments typically have several non-production environments and a production environment. For example, if an Oracle Fusion Cloud Applications cloud account is named ABCD, then you can name two of the environments in that family ABCD-TEST and ABCD-PRODUCTION.

Use the checklist to confirm that the action items are planned for. See [Oracle Fusion Cloud Applications Environments Checklist](#).

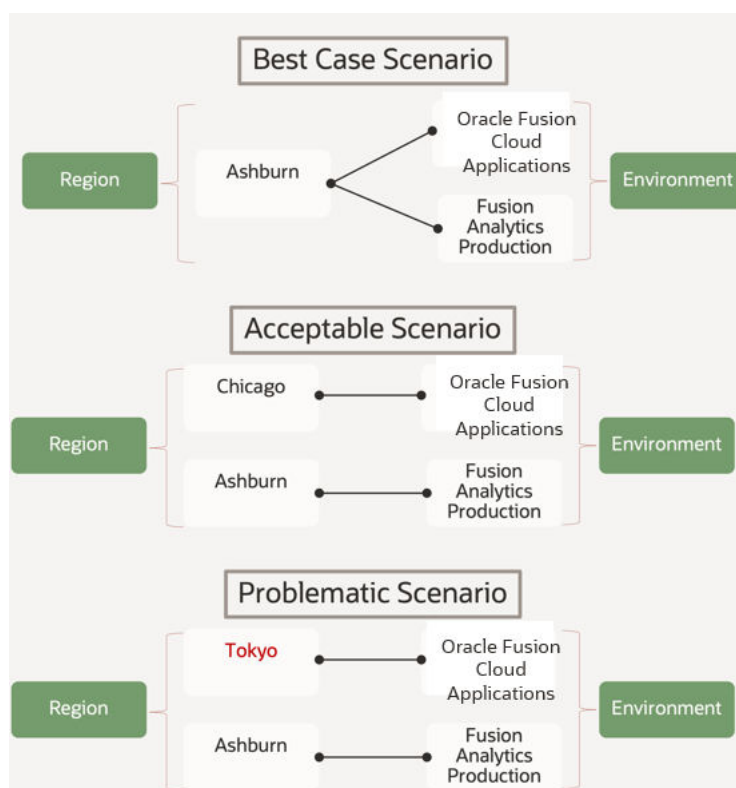
Environment Pairing

Each Fusion Analytics environment is paired with an Oracle Fusion Cloud Applications environment.

You can pair a Fusion Analytics non-production environment with any of the Oracle Fusion Cloud Applications non-production environments.



Review these pairing scenarios:



Use the checklist to confirm that the action items are planned for. See [Environments Pairing Checklist](#).

Compartments

Compartments are cross-region logical partitions within a cloud account. They control access to and set usage quotas for the Fusion Analytics environments.

As a Fusion Analytics cloud account administrator, create each Fusion Analytics environment in a separate compartment. For example, create the Fusion Analytics development environment in a compartment named FAW_Development. Create the Fusion Analytics production environment in a compartment named FAW_Production. This separation ensures administrators of each environment have unique privileges.

See [Compartments](#).

Use the checklist to confirm that the action items are planned for. See [Compartments Checklist](#).

Groups

Groups are collections of users who receive privileges to access and perform tasks in tenancies, compartments, and applications.

As a Fusion Analytics cloud administrator, create a Fusion Analytics Service Administrator group for the administrators of each of the Fusion Analytics environments; for example, FAW_Development_Administrators and FAW_Production_Administrators. These groups provide the privileges necessary to create and administer the Fusion Analytics environments.

See [Groups](#).

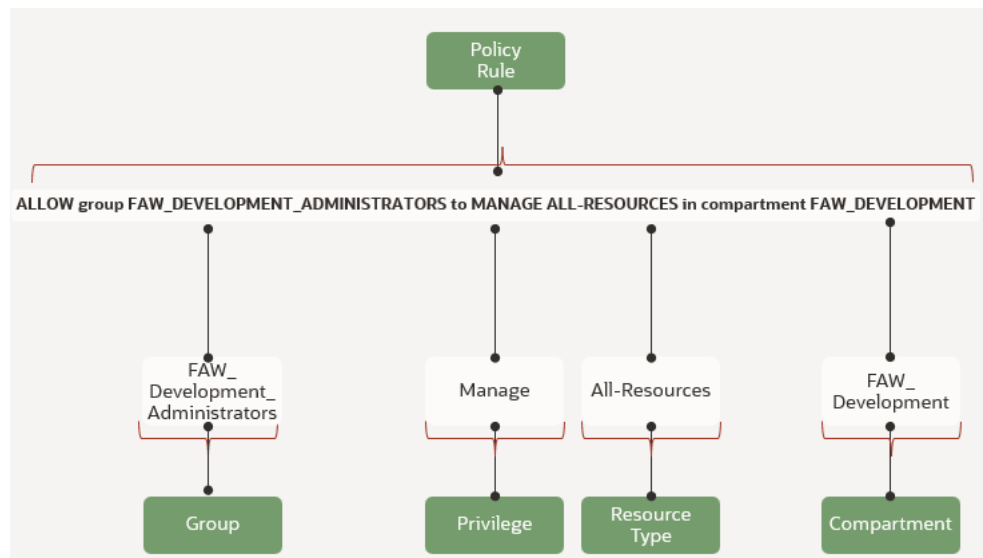
Use the checklist to confirm that the action items are planned for. See [Groups Checklist](#).

Policies

Policies are collections of rules that specify what groups can access which Oracle Cloud Infrastructure compartment resources and how. A policy rule allows a group to interact with a specific type of resource in a particular compartment.

As an Oracle Cloud Infrastructure administrator, create a rule for each compartment and group such as:

```
Allow group FAW_DEVELOPMENT_ADMINISTRATORS to MANAGE-ALL-RESOURCES in compartment FAW_DEVELOPMENT
```



See [Policies](#).

Use the checklist to confirm that the action items are planned for. See [Policies Checklist](#).

4

Perform the Fusion Analytics Implementation Activities

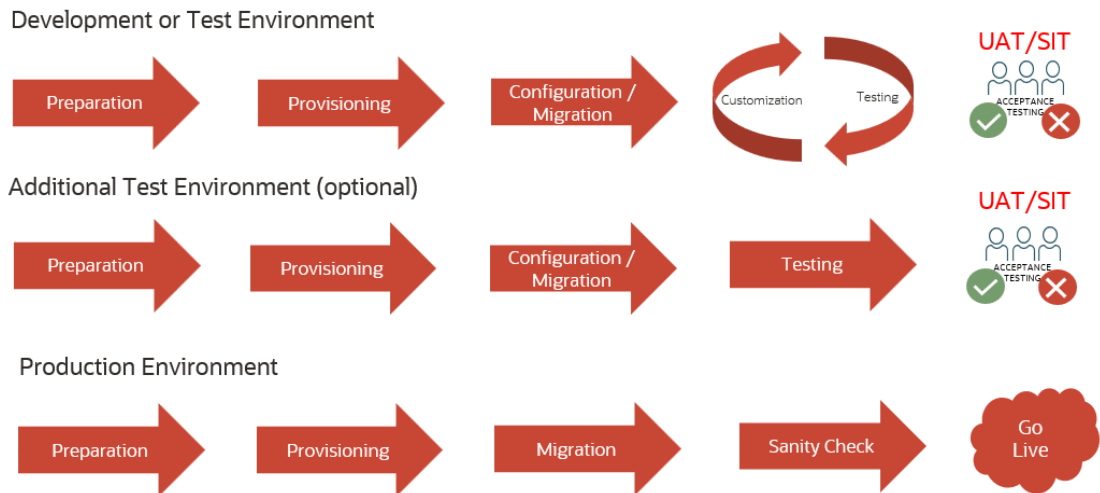
Perform these activities to successfully implement Fusion Analytics.

Topics:

- [Establish Environment Implementation Sequence](#)
- [Prepare for Implementation](#)
- [Create an Instance](#)
- [Configure and Validate](#)
- [Customize](#)
- [Test](#)
- [Migrate](#)

Establish Environment Implementation Sequence

As individual environment administrators, start by implementing your development or test environment and then implement the production environment.



The development or test environment is a controlled environment where developers can create, test, and modify the data models, extensions, and customizations before moving them into the production environment or other additional test environments, if any. This helps to identify and fix any issues before they impact the live system.

Determine the resources for performing the tasks illustrated in the implementation journey and to administer the development or test environment, optional additional test environment,

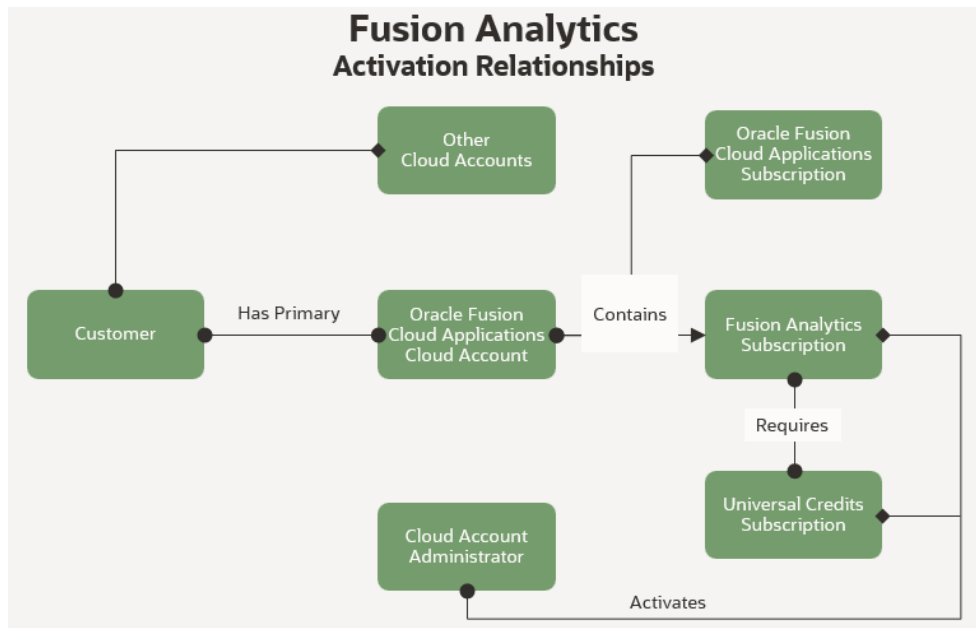
and the production environment. For migrations, develop a coordination plan for the administrators of the different environments. Utilize an additional test environment, if necessary, for quality assurance and testing. See [Implementation Cheatsheet](#).

Use the checklist to confirm that the action items are planned for. See [Establish Environment Implementation Sequence Checklist](#).

Prepare for Implementation

Prior to creating the Fusion Analytics instances, you must complete these preparatory tasks:

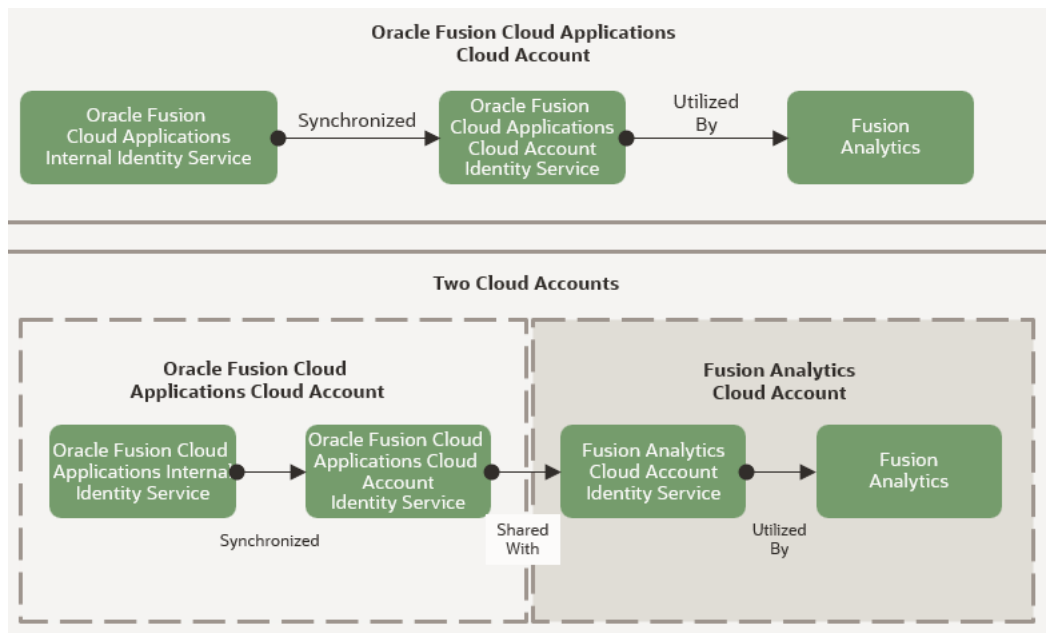
1. Activate a Fusion Analytics subscription.



See [About Activating Your Oracle Fusion Analytics Warehouse Subscription](#). This task requires:

- Fusion Analytics Cloud Account Administrator
- Oracle Fusion Cloud Applications Cloud Account Administrator

2. Set up user synchronization and single sign-on.



See these:

- [Set Up User Access to Oracle Fusion Analytics Warehouse Using Single Sign-On](#)
- [Using the SCIM Interface with IDCS](#)
- [Federating with Identity Providers](#)
- [Best Practices for Administering Fusion Analytics](#)
- [Setting up Fusion Analytics and Single Sign-On](#)
- [IDCS Sync and SSO](#)
- [How to add the FA_GSI_ADMINISTRATOR role to a user](#)

This task requires:

- Fusion Analytics Service Administrator
 - Fusion Analytics Cloud Account Identity Administrator
 - Third-Party Identity Administrator
 - Oracle Fusion Cloud Applications Cloud Account Identity Administrator
 - Oracle Fusion Cloud Applications Administrator
3. Prepare Oracle Fusion Cloud Applications. See [Prepare Your Oracle Fusion Cloud Applications](#).
 4. Optionally, prepare to deploy Fusion Analytics with a private endpoint if you don't want it accessible from the internet. This type of deployment requires additional network preparation. You can use existing virtual cloud network components or create additional components. See [Deploy Oracle Fusion Analytics Warehouse with a Private Endpoint](#) and [Preparing Private Fusion Analytics](#). This task requires a cloud account network administrator.

Use the checklist to confirm that the action items are planned for. See [Prepare for Implementation Checklist](#).

Prepare Your Oracle Fusion Cloud Applications

Oracle Fusion Cloud Applications is the primary source of Fusion Analytics data. As the Oracle Fusion Cloud Applications cloud administrator and functional administrator, ensure you configure the functional and non-functional components of Oracle Fusion Cloud Applications.

Review these configurations and modify, if required:

- Functional configurations - Examples of functional configurations that can increase the value of your analytics are:
 - Enterprise Calendar across all the Fusion Analytics applications.
 - Exchange rates from Enterprise Resource Planning.
 - Age bands from Human Capital Management.
 - Opportunity and revenue snapshots from Customer Experience.

See these resources for the subscribed applications to determine if you need to modify the configurations:

- [Customer Experience Prerequisites](#)
- [Oracle Fusion HCM Analytics: Best Practice Guidelines for Oracle Cloud HCM](#)
- [Enterprise Resource Management Prerequisites](#)
- [Human Capital Management Prerequisites](#)

This task requires:

- Oracle Fusion Cloud Applications Administrator
- Fusion Analytics Functional Administrator
- Network preparation - As an Oracle Fusion Cloud Applications cloud network administrator, prepare the Oracle Fusion Cloud Applications networking components such as the access control lists and location-based access control to allow Fusion Analytics to connect to Oracle Fusion Cloud Applications and extract data. See [Overview of Location-Based Access Control](#) and [Verify LBAC Setting](#). This task requires an Oracle Fusion Cloud Applications cloud network administrator.
- Authentication preparation - As the Oracle Fusion Cloud Applications security administrator, prepare Oracle Fusion Cloud Applications to authenticate Fusion Analytics to orchestrate data pipeline extractions and perform health checks. Authentication is possible through a JSON web token-based public key certificate and associated private key, or through a service account and password. Oracle recommends using the JSON web token-based authentication method because it increases security and decreases password administration. See [JWT-based documentation](#) and [JWT-based blog post](#) to create the X.509 components and upload the public key certificate to Oracle Fusion Cloud Applications. Develop a certificate maintenance schedule to replace the certificate before it expires. An expired certificate impacts the data refresh processes and health checks. This task requires an Oracle Fusion Cloud Applications security administrator.

Use the checklist to confirm that the action items are planned for. See [Prepare Your Oracle Fusion Cloud Applications Checklist](#).

Create an Instance

As a Fusion Analytics cloud account administrator and service administrator, typically, you create a Fusion Analytics instance with public IP addresses. Optionally, you can create a Fusion Analytics instance with private IP addresses. You may also plan for additional test environments.

In your Oracle Fusion Cloud Applications service, if you've selected integration with Oracle Fusion Analytics Warehouse, then you can create an integrated Oracle Fusion Analytics Warehouse instance. See [Create an Integrated Oracle Fusion Analytics Warehouse Instance](#).

Public Environment

Fusion Analytics, by default, is a public service deployed in the Oracle Services Network with public IP addresses.

Private Environment

This instance is deployed in a virtual cloud network with private IP addresses in your Fusion Analytics cloud account.

For both types of instances, you need the following information:

- The environment type, for example, development or test.
- The Oracle Fusion Cloud Applications environment name and URL.
- The JWT (JSON web token) certificate that was uploaded to Oracle Fusion Cloud Applications and the associated private key. The recommended authentication type is JWT token-based with security certificate and private key renewal; see [Using JWT Token with Fusion Analytics](#).
- The identity stripe or domain name used for the Fusion Analytics environment.
- The compartment name.
- The region name.
- An Oracle Autonomous Data Warehouse password.
- An email address for provisioning and any future updates.

To create the Fusion Analytics instance with private IP addresses, you need these details in addition to the details required for a public instance:

- The compartment hosting the virtual cloud network.
- The compartment hosting the private subnet.
- The compartment hosting the network security group.
- The virtual cloud network name.
- The private subnet name.
- The network security group name.

Create the production instance along with the development and additional test instances simultaneously.

See [Create an Oracle Fusion Analytics Warehouse Subscription Instance](#) and [Create an Oracle Fusion Analytics Warehouse Private Instance](#).

Use the checklist to confirm that the action items are planned for. See [Create Fusion Analytics Instance Checklist](#).

Configure and Validate

Fusion Analytics data analysis and visualization depend on the following:

- A Fusion Analytics service administrator configuring data extraction, reporting parameters, and security assignments.
- An Oracle Cloud Infrastructure administrator configuring network access to the services.

Configurations are required for each Fusion Analytics environment and determine what and how much source data from Oracle Fusion Cloud Applications is loaded, how frequently it is refreshed, how it is secured, and how it is displayed.

Fusion Analytics configurations comprise:

1. Data configuration.
2. Reporting configuration.
3. Security configuration.

Oracle Cloud Infrastructure configurations comprise:

- Access configuration for Fusion Analytics with private endpoints.
- Network security configuration for Fusion Analytics.

Refer to [Configure and Validate Oracle Fusion Analytics](#) for detailed guidance.

Configure Content

Content in this context refers to the prebuilt analytical visualizations, dashboards, and reports.

Oracle recommends modifying content in the customization phase. However, minor exceptions allow modifying prebuilt content immediately after provisioning.

Ensure that you:

- Delay any content modifications to the customization phase.
- If necessary, modify only reporting objects, not the underlying semantic model.
- Document the modifications so they are included in the customization phase.

See [Get Started with Key Metrics, KPIs, Cards, and Decks](#) and [Work with Projects](#).

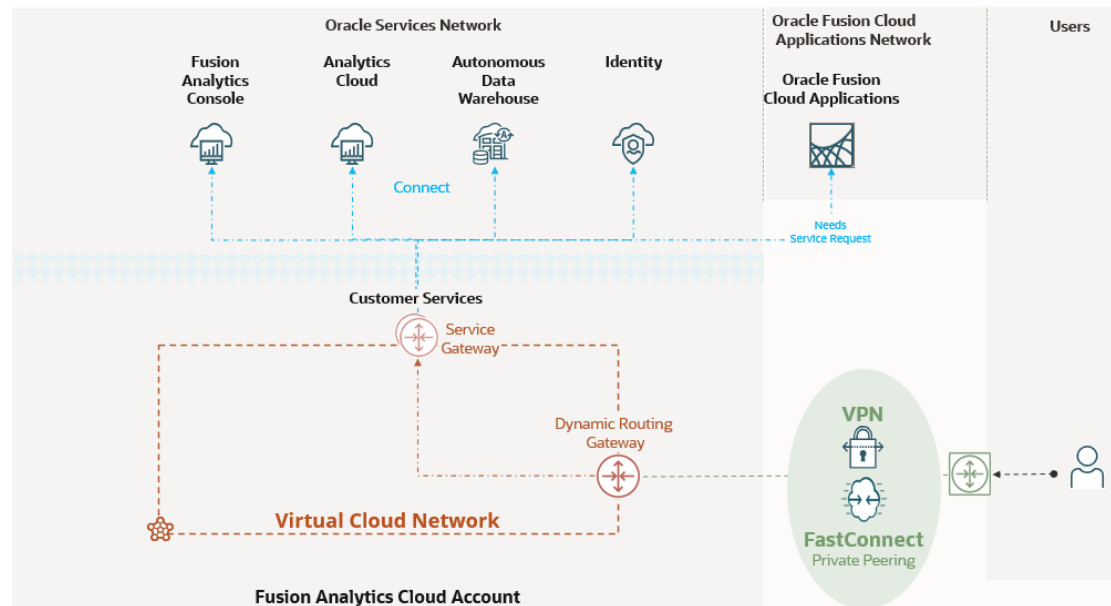
This task requires the Fusion Analytics service administrator and Fusion Analytics functional administrator.

Configure Private Network Access (Optional)

This information applies to Fusion Analytics environments provisioned with public IP addresses.

If you're planning to use private network access for Fusion Analytics deployed with private endpoints, then refer to [Configuring Oracle Fusion Analytics](#).

Private Access to Oracle Services, also known as Transit Routing, refers to a network topology in the customer's network that uses an intermediary to reach the Fusion Analytics services without the network traffic going over the public internet. In this scenario, the intermediary is a dynamic routing gateway attached to both the customer's network and a virtual cloud network in the Fusion Analytics cloud account. Traffic travels over a FastConnect private virtual circuit or Site-to-Site VPN, through the dynamic routing gateway and a service gateway to the Fusion Analytics services. This topology may currently exist in a cloud account containing services other than Fusion Analytics.



Review these prior to providing private access:

- [Private Access to Public Fusion Analytics](#)
- [Dynamic Routing Gateway](#)
- [Virtual Cloud Network](#)
- [FastConnect](#)
- [Site-to-Site VPN](#)
- [Service Gateway](#)

This task requires a Fusion Analytics service administrator, cloud account network administrator, and on-premises network administrator.

Enable the Preview Features (Optional)

As the Fusion Analytics service administrator or functional administrator, you can view all preview features and choose which ones to enable based on your business requirements.

You can monitor which features have been enabled or disabled through an activity report available under the Activity tab on the Enable Features page. Ensure that you:

- Review and perform the prerequisites for the features you enable.
- Enable preview features on a development or test environment first.

- Allow enough time in your project plan to thoroughly test the preview feature and ensure it is suitable for your needs.
- Enable the preview features in a production environment only after they have been thoroughly tested and functionality confirmed.

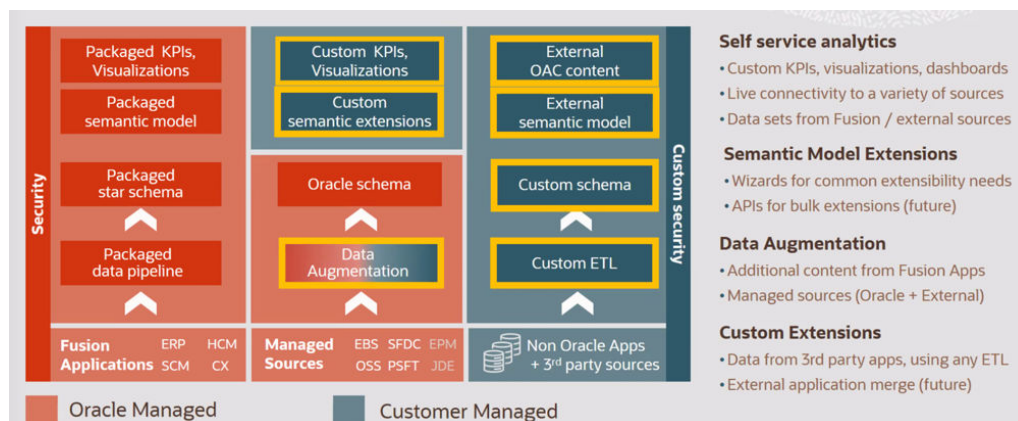
See [Preview Features](#).

Customize

You can customize Fusion Analytics to satisfy business requirements and increase reporting capabilities.

Oracle recommends following the phased implementation approach and perform the customizations after the two ready-to-use content rollouts. Performing customizations before signing off on the first two ready-to-use content phases adds unnecessary risks to an implementation project. You must perform customization activities in an environment that you consider the master development environment.

You can extend Fusion Analytics to modify and create reporting content, data content, semantic model content, and security assignments. These types don't necessarily depend on each other, aren't necessarily sequential, and may not all apply to the business requirements.



Use the checklist to confirm that the action items are planned for. See [Customize Checklist](#).

Custom Reports

Fusion Analytics includes ready-to-use reports and subject areas that allow users to create reports. As users create custom reports using the ready-to-use subject areas, it's important to organize them and secure them adequately to ensure that the correct business users with the correct permissions are allowed access to the custom reports and projects.

There are multiple types of custom reports. Plan to save each type in specific folders with adequate permission.

Ensure that:

- Developers or key power users define reports to be shared with specific groups of consumers.
- An application role is available to identify all the consumers that must have read access to these reports.
- A role is available for users who must have write access.
- Shared folders with appropriate read or write access to store these reports for each role are available.
- Service administrators always have full control for the folders.
- Ad hoc reports created by business users for themselves are saved in the user's folder.
- Ad hoc reports created by a business user to be shared are stored in specific shared folders with write access to everyone. If needed, the user who creates the report can configure permissions to give access only to the selected users.

See:

- [Begin building a workbook and create visualizations](#)
- [Assign shared catalog folder and workbook permissions](#)

This task requires Fusion Analytics service administrator, Fusion Analytics security administrator, and Fusion Analytics authors.

Semantic Model Extensions

Plan to extend the semantic model to meet your business requirements. This entails creating and modifying subject areas to leverage the data extensions.

Some examples are:

- Add or extend subject areas
- Add or extend dimensions
- Add facts
- Add or extend hierarchies
- Add session variables
- Add derived columns

Explore these options to extend the semantic model:

- Use data augmentation to automatically add new data into the semantic layer in some situations. When you use data augmentation to load additional information, you can use it sometimes to extend the semantic layer. There are three different types of data augmentation:
 - **Extend Entity:** Use this to add additional attributes to existing dimensions. Attributes loaded with this type of data augmentation are automatically in subject areas in the selected folder. This extension type is possible only with a join on the entity's primary key.
 - **Custom Dimension:** Use this to create an entirely new dimension. Attributes loaded with this type of data augmentation are added in subject areas only if they are joined with a custom fact created with data augmentation.

- Custom Fact: Use this to create a new fact table. Attributes and measures loaded with this type of data augmentation are automatically added to the subject areas selected. Note that specifying a subject area is not mandatory.

A common usage of data augmentation is to extend a dimension with additional attributes, assuming that the join key is included in the data source.

- Use the Semantic Model Extension wizards that can use tables created by the data augmentation processes. This is the primary tool to use to modify the semantic layer. Below are some examples, but they are not exhaustive:
 - Data is loaded through data augmentation, but data augmentation cannot make the appropriate modifications in the semantic model. For instance, the join with the existing dimension isn't based on the primary key, or some transformations must be applied after loading the data.
 - Extensions need to be added in prebuilt subject areas.
 - Calculations are based on prebuilt facts.

A common usage of this tool is to create derived metrics based on existing fact metrics or to extend a dimension with attributes that can't be joined through data augmentation.

You can use them together in the same Fusion Analytics environment. Though each possibility is helpful for specific use cases, review these recommendations:

- When creating a custom model, a custom fact in particular, ensure that you join it with prebuilt dimensions so that prebuilt columns and custom columns are used in the same report.
- Minimize the number of semantic layer customization steps as much as possible by applying all the required modifications to the corresponding object in each step. When additional customizations on the same object are added later, modify the existing step instead of adding a new one.

This task requires:

- Fusion Analytics Service Administrator
- Data Engineer

See:

- [About Augmenting Your Data](#)
- [Customize Oracle Fusion Analytics Warehouse](#)

Security Extensions

You can use new and existing application roles to configure data and object security for the data and semantic model extensions.

As a service administrator, security administrator, and semantic modeler administrator, you can:

- Provide data security by restricting user access to data using application data roles. This filters the data presented to users based on their application data roles. Data security configuration is significantly different depending on the source Oracle Fusion Cloud Applications. Each Fusion Analytics application has its way of handling data security. Even though Fusion Analytics platform features are always the same, they are used differently depending on the application. Security

assignment configuration is fully, partially, or not automated, depending on the Fusion Analytics application.

- Set up object permissions to restrict user access to catalog content (reports and visualizations) and subject area content (subject area, folders, and columns) using the ready-to-use and custom duty roles. Duty roles set either "Default (inherits from the parent element)", "No access", or "Read-only" permission levels to the objects they protect.
- Customize the permissions for the ready-to-use duty roles and create permissions for custom roles.

You must:

- Assess the ready-to-use data security configuration and determine what business requirements it satisfies. Use data security extensions for any requirements that aren't satisfied with the ready-to-use data security configuration.
- Document all security extensions.
- Maintain matrices of the extensions and the corresponding application roles that secure them.
- Validate the security extensions by testing them before publishing them to production.

See:

- [Configuring Custom Data Security in Fusion Analytics Warehouse in Nine Steps](#)
- [Configure Data Security](#)
- [Configure Object Security](#)
- [Configure Object Permissions](#)

Data Extensions

As a service administrator and data engineer, use data extensions to add additional data for analytics.

The storage capacity in Oracle Autonomous Data Warehouse is planned to support data coming from your subscribed Oracle Fusion Cloud Applications sources. However, if you add data coming from another source, you need to ensure that you have enough storage available. Fusion Analytics includes 50 GB of storage for external data. If you're planning to load more volume, you need to add additional capacity to the database (in storage and potentially OCPU). Adding capacity will consume Universal Credits. Plan to extend data using any or all of these options in the same environment for different use cases:

- Custom Data Configurations
- Data Augmentation
- Self-service using Oracle Analytics Cloud Datasets and Dataflows
- Third-party ETL tool such as Oracle Data Integrator

See:

- [Custom Data Configurations](#)
- [Data Augmentation](#)
- [Self-Service using Fusion Analytics Datasets and Dataflows](#)
- [Third-Party ETL \(Extract, Transform, and Load\) Tool](#)

Custom Data Configurations

Custom data configurations are ready-to-use templates that enable you to bring data into the autonomous data warehouse quickly.

Currently the only template available is for Descriptive Flex Fields (also referred to as DFF). You only need to select the list of DFF columns you want to import for each object. Data is loaded in the pipeline managed by Oracle and added to the semantic layer automatically.

See [Extend Data with Custom Applications](#).

Data Augmentation

Use data augmentation to add additional data from a supported data source that doesn't require transformation. Oracle Fusion Cloud Applications data must be available in a view object to be loaded through data augmentation. Data augmentation can extend existing dimensions, create new dimensions, and create new facts.

There are many benefits to using data augmentation:

- Oracle manages the execution.
- It's scheduled with the prebuilt pipelines, which is essential for data consistency (extract dates are the same).
- There is no need to buy, learn, or manage another extraction tool.

But data augmentation has these limitations currently:

- No data transformation.
- No joining with other tables and data sources.
- A limited number of supported data sources, most available in preview only.

Leverage views in the OAX_USER schema built on the augmentation tables to implement transformations and joins. Depending on the performance requirements, these views can be materialized. However, this is useful only for simple use cases. Performance and maintenance quickly become issues if the transformations are too complex (multiple joins, aggregates). In that case, using a third-party extraction tool is the best option.

See [About Augmenting Your Data](#).

Self-Service using Fusion Analytics Datasets and Dataflows

Fusion Analytics allows users to upload datasets directly and use them for reporting or joining them with existing subject areas.

These datasets can come from a file or be defined using a connection to an external application. Datasets are designed to provide self-service extension capabilities to business users to bring in external data that's not in the semantic model. Dataflows transform and load datasets data, for instance, into a custom schema in the Fusion Analytics database. Dataflows can load only a small volume of data and are currently accessible only by their owner. But once loaded in the database, the corresponding table can be added in the semantic layer. Depending on the mode selected, a dataflow can drop and recreate the target table when executed. Since tables used in the semantic layer must have access granted to user OAX\$OAC, granting access by

default to the entire custom schema is safer. Otherwise, execute the grant SQL statement after each execution of the data flow.

See:

- [What are Datasets](#)
- [Create datasets using dataflows](#)

Third-Party ETL (Extract, Transform, and Load) Tool

Fusion Analytics allows users to upload datasets directly and use them for reporting or joining them with existing subject areas.

Any third-party extraction tool that supports Oracle Autonomous Data Warehouse can load external data into the Fusion Analytics database. Oracle Data Integrator is an example of an extraction tool.

Plan to use an extraction tool to load external data as a last resort when none of the other solutions are appropriate. You must review data augmentation and connectors first and if you can't use either of these capabilities, then plan to use Oracle Data Integrator for Marketplace and other ETL tools.

There are a few elements that are important when loading data into the Fusion Analytics database with an extraction tool:

- Ensure that custom data loads don't run simultaneously with pipelines to avoid contention on database resources. You can determine that an incremental pipeline is finished when a new record is inserted into table DW_WH_REFRESH_SUMMARY with the process name _REFRESH_SCHEDULED.
- Use the Low service connection to the autonomous data warehouse. Using the High or Medium service consumes too many resources and can cause performance issues for other processes running on the database.
- Depending on the design of your load process, data inconsistencies and performance issues can appear in reports if users access the custom tables while they are being loaded. Try to load the data outside of business hours.

See [Configuring Custom ETL from Fusion Analytics Warehouse](#).

Test

Complete the functional, performance, and user acceptance testing for a successful implementation. The specific testing requirements may vary depending on the implementation and customization of the application.

Ensure that you:

- Use a variety of testing techniques. In addition to functional and performance testing, consider using other testing techniques such as usability testing, security testing, system integration testing, and regression testing to ensure that the Fusion Analytics artifacts are meeting all business requirements.
- Use realistic test data that accurately reflects the data used in the production Fusion Analytics instance. This will help ensure that the workbooks are working as expected and the results are accurate.
- Involve business stakeholders in testing to ensure the development objects meet business needs and requirements.

Review the following for:

- Functional testing - As a functional administrator:
 - Plan to grant appropriate application roles for each functional activity.
 - Plan to test the typical functional activities, such as creating a diversity report.
 - Perform role-based testing of Fusion Analytics metrics.
 - Validate data after loading it into Fusion Analytics. Validate the common library of metrics that exist in both Fusion Analytics and Oracle Transactional Business Intelligence.
 - Validate the functional security setup in Fusion Analytics and the alignment with the source system data.
 - Clearly define functional scenarios and use cases.

See [Validate Your Data](#).

- Performance testing - As a service administrator and functional administrator:
 - Once you configure the Fusion Analytics test environment, you must execute the performance tests. This involves running the performance testing scenarios and recording the performance metrics. Ensure not to use the additional test instances to conduct any performance testing because these instances are provisioned with less resource capacity compared to the standard instances provisioned as part of the original order. While connecting to Oracle Autonomous Data Warehouse to query the Fusion Analytics data, ensure that you select the service level as Low.
 - After completing performance testing, you must analyze the results to identify performance issues or bottlenecks. The recommendation is to use the Warehouse Refresh Statistics subject area for analysis. This may involve reviewing performance metrics, analyzing system logs, performing root cause analysis, and analyzing the size and customizations complexity of the source system.
 - If testing identifies performance issues or bottlenecks, then you must work with the development team to optimize system performance. This may involve changing the system configuration, activating only the required functional areas, modifying the ETL process, or changing the data sources. Note that patching of source or target systems might impact the performance, hence avoid benchmarking the performance during this time window.

See [Best practices to optimize the Fusion Analytics data pipeline refresh performance - YouTube](#) and [About Data Refresh Performance](#).

- □ User acceptance testing - As a functional administrator and quality assurance specialist:
 - Ensure that the testing end users have the necessary groups and roles to perform the tests.
 - Develop a set of test scenarios covering all aspects of Fusion Analytics. Test scenarios should be written in a way that's easy to understand and follow. They should also be representative of real-life scenarios that users will encounter.
 - Perform tests based on the test scenarios that were created. This includes performing functional tests, usability tests, and performance tests. It's essential to document any issues or defects that are encountered during testing.

- After all the tests have been completed and any high priority issues resolved, review and approve the application for production release.

Use the checklist to confirm that the action items are planned for. See [Test Checklist](#).

Migrate

There are times when you need to migrate application artifacts across environments even during your first implementation. Use Bundles, which are snapshots of your application artifacts at a certain point in time to migrate application artifacts or to back up your application artifacts.

You may need to do a complete system restore when something goes wrong with an environment. As a service administrator, review your environment strategies and plan for migration activities for each environment. You must allocate the necessary time for migration activities in your implementation project.

Review these:

- [Bundle Your Application Artifacts](#)
- [Fusion Analytics Warehouse: Migrate Data Augmentations Across Environments \(oracle.com\)](#)
- [Oracle Fusion Analytics: Migrate Oracle Analytics Content, KPIs, and Decks Across Environments using a Content Bundle](#)
- [Best Practices for Administering Fusion Analytics Warehouse](#)
- [Provisioning Private Oracle Fusion Analytics](#)

Use the checklist to confirm that the action items are planned for. See [Migrate Checklist](#).

5

Plan the Go Live Activities

Prior to going live, as a project manager, you must ensure that the service is ready to go live and then rollout the service to your business users.

Topics:

- [Evaluate Go Live Readiness](#)
- [Go Live](#)

Evaluate Go Live Readiness

A Fusion Analytics implementation comprises a broad spectrum of activities. Save valuable time and prevent errors by carefully evaluating implementation go live readiness for the phase rolled out to the business community.

Determine if the business is prepared to accept and manage Fusion Analytics in production. Evaluate the Fusion Analytics production environment, the project status, business and technical requirements, success criteria, and the migration of customizations.

Complete these evaluations:

- **Environment** - The Fusion Analytics service administrator and Oracle Fusion Cloud Applications security and functional setup administrators ensure the production Fusion Analytics environment is ready for rollout.
- **Project** - The project manager evaluates the project status and ensures Fusion Analytics is ready for rollout.
- **Requirements** - The technical and functional administrators confirm the defined requirements are satisfied.
- **Success Criteria** - The executive sponsor, implementation lead, and project manager ensure the implementation goals, objectives, and success criteria are attained.
- **Migration** - The Fusion Analytics service administrator ensures a prebuilt baseline is available, the migration of artifacts from the test environment is completed successfully, and customizations meet the specific customization requirements and success criteria.

Refer to [Fusion Analytics Implementation Go-Live Readiness](#) for guidance and checklists.

Go Live

Planning your rollout to users is essential for a successful Fusion Analytics implementation. This includes assessing system readiness, preparing your user community, scheduling go-live, and preparing for an audit. By adequately preparing for go-live, you can establish a solid foundation for the rollout of Fusion Analytics.

Complete these tasks:

- **Prepare the production environment** - As a service administrator, you can create the production environment along with the development and additional test environments

simultaneously. This avoids last-minute issues and provides sufficient time for unanticipated events. You must:

- Ensure your Fusion Analytics production environment is in place. This means configurations are enabled, users are set up, and data security roles are turned on. It also means all the content is migrated.
- Update the production environment with the latest release and align with the development environment release version to facilitate migration activities. If required, keep resources ready for migration.
- Ensure all the configurations and migrations are complete.
- Ensure the descriptive flex fields configuration migration is complete.
- Confirm that there are no open issues.
- Ensure that the Oracle Analytics Cloud URL has been communicated to users and is accessible.

 **Note:**

Only the administrators and developers must use the Fusion Analytics URL, while the business users must directly access the corresponding Oracle Analytics Cloud URL without going through Fusion Analytics.

- Establish collaboration - As a project manager, establish collaboration between all parties. Successful Fusion Analytics implementations revolve around building a mutual understanding of the goals and objectives of the implementation. It is crucial for everyone, from the sponsor to end users, to be in synchronization. Everyone needs a clear understanding of the implementation plan, its benefits, and what to expect during the Fusion Analytics implementation process.
- Prepare the business users - As business leads and service administrators, prepare your business users because this is a crucial task for successful application go-live and adoption. You must engage users at the outset of the project, and at key milestones, especially during user acceptance testing. Have a plan for business user preparation, training, and revised operating procedures communication and confirm that the plan is executed before go-live. Share the go live plans with the user community. Ensure that the user community is well aware of the organizational support process and reaches out to the core implementation team for assistance. This helps ensure a smooth go-live experience. Review the sample plan to onboard the Fusion HCM Analytics users, see [Plan for Onboarding Fusion HCM Analytics Users](#).
- Prepare organizational communication - The implementation team should assess organizational preparation for go-live readiness early and frequently. It must communicate early and often regarding each activity's status, readiness, completeness, and maturity to the project stakeholders and the steering committee. Based on this information, the executive sponsor must communicate with a focus on the benefits to the organization and what's in it for the business users. The project manager must:
 - Set up a communication plan for project stakeholders.
 - Ensure that the solution has been validated.

- Assign at least one person whose priority is to respond to inbound communications.
- Ensure organizational change control processes are in place.
- Plan to mitigate external dependencies across the organization.
- Create Post Go-Live standard operating procedures.
- Confirm that a change management process is in place.
- Plan for user training and adoption.
- Plan to review accessibility requirements.
- Create a monitoring and maintenance routine for production.
- Build excitement and set expectations.
- Conduct user demos of the Fusion Analytics application navigation and functionality. Makes these demos a part of organization communication events to promote data-driven culture.
- Build metrics to show alignment with organization goals, and arrange display monitors across organization premises to showcase the organization's broad key metrics tracking adoption.
- Recommend users to set up and use mobile application features to view the refreshed data daily and host office hours sessions with business users to clarify open questions to drive adoption.

This task requires:

- Service Administrator
- Change Management Team
- Project Management Team
- IT Support Team

See [Accelerate Oracle Fusion Analytics customer journey](#).

- □ Schedule the rollout - Communicate the schedule to the impacted business units.
- Support go live - Plan for the first few weeks after your Fusion Analytics implementation goes live for the core implementation team to provide go-live support. The goal of the go-live support is to have the implementation team quickly address any issues as the business users start to use the service.
- Track usage - As the implementation and business leaders, plan to consistently track the system using the Usage Tracking workbook that offers user-level audit reports. To keep an audit log of users who have logged in to the system, Fusion Analytics service administrators can use the Usage Analytics page. This capability is essential for protecting the organization's data by identifying roles that have access to sensitive information. The sensitive data identifier enhances the user logging experience by producing audit logs that show which users have access to sensitive data. This feature is particularly beneficial for organizations that have multiple roles with varying levels of access to certain data and require detailed auditing to track users who have accessed sensitive information. To maintain segregation of duties between roles, Fusion Analytics service administrators can download the security duty roles assignment report in the non-production and production environments to view all the duties assigned to a role. You can configure this report to run on any collection of roles.
- Consult the audit logs - As a service administrator and security administrator, consult the different audit logs that you can generate for troubleshooting purposes.

Use the checklist to confirm that the action items are planned for. See [Go Live Checklist](#).

Plan for Onboarding Fusion HCM Analytics Users

Review this sample onboarding plan while preparing your plan to onboard administrator and business users. The sample plan discusses how to onboard Fusion HCM Analytics users.

Plan user onboarding as follows:

- Administrators - Include around 1 to 10 users who are either a service administrator, security administrator, and functional administrator, or all.
- HR, HR Analyst, Analyst - Include around 0.3% to 3% of the workforce with the following access:
 - HR Analyst – All Access
 - AOR based access (Recommended)
 - * Set up Area of Responsibility (AOR) in HCM Cloud
 - * Set up custom security using AOR
 - * AOR changes will automatically be updated unless AOR structure changes
 - Other Options (Ongoing maintenance)
 - * Ready-to-use predicates such as Business Unit (BU), Legal Entity (LE), Country, Department
 - * Custom security in Fusion Analytics
 - * Extract, Transfer, and Load (ETL)
- Line managers - Include upto 10% of the workforce with the following:
 - Supervisor Hierarchy
 - * Automatic with Abstract Line Manager Role in Cloud HCM
 - * Quick setup in Fusion Analytics for HCM Cloud users with custom line manager role
 - Override as needed using AOR, ready-to-use objects, custom security, or ETL
- Non-HCM users - Include users such as Taleo User, Survey Analyst, SI partners depending on your business requirements. Plan to:
 - Create user account in Fusion Analytics
 - Grant access using custom security
- Functional analyst - includes Payroll Analyst, Recruitment Analyst, Talent and Development, and Learning Analyst. Plan to:
 - Grant functional access to respective content area
 - Grant data access using AOR, ready-to-use objects, custom security, or ETL

Plan for these additional controls:

- Author versus Consumer
- Access by functional areas such as Recruiting, Talent, and Compensation

- Access by objects such as Aggregate versus Detailed Reports and Hide prebuilt reports

6

Plan the Post Go Live Activities

"Post Go Live" refers to the period after a phase of the implementation has been put into production use.

During this period, you must plan to:

- Monitor the service closely.
- Track the system performance, user adoption, and user feedback.
- Address any problems promptly.
- Provide ongoing training, user manuals, and online support for the new business users to ensure they're comfortable using the new system correctly.

Topics:

- [Engage with Oracle Support](#)
- [Update Fusion Analytics](#)
- [Adopt and Expand](#)
- [Implement a Governance Program](#)

Engage with Oracle Support

As Fusion Analytics users, if you come across any issues while using Fusion Analytics, it's recommended that you reach out to Oracle Support for assistance. When creating a support ticket, be sure to provide an accurate description of the issue and specify the severity based on the project timelines.

Review these:

- [Creating a Fusion Analytics Service Request with Oracle Product Support](#)
- [Fusion Analytics Issue Categorization](#)
- [How to collect browser logs](#)
- [Request Management Attention to a Service Request](#)

Use the checklist to confirm that the action items are planned for. See [Engage with Support Checklist](#).

Update Fusion Analytics

After the initial implementation, service administrators can update Fusion Analytics by uptaking the latest releases, modifying the number of subscribed Fusion Analytics users, and adding Fusion Analytics applications.

Complete these tasks:

- To update Fusion Analytics content, periodically check for notifications regarding new releases, plan and communicate decisions on when updates are performed, and discuss

and ensure these align with your overall governance and compliance policies. See [Update Your Application](#) and [About Oracle Fusion Analytics Warehouse Releases](#).

- To modify the number of subscribed Fusion Analytics users and add new applications such as Oracle Fusion HCM Analytics to your existing Fusion Analytics subscriptions that contains Oracle Fusion ERP Analytics, see [Update Your Subscriptions](#).

Use the checklist to confirm that the action items are planned for. See [Update Fusion Analytics Checklist](#).

Adopt and Expand

Adoption refers to the journey by which Fusion Analytics is accepted and used by all business users.

It's critical to an implementation's success, as even the best-planned implementation fails if it isn't adopted. It's essential because first impressions of Fusion Analytics and your department's ability to support it set the tone for adoption. During adoption, new business users become aware of the new implementation, try it out, understand its value, and begin to use it.

It's essential to measure adoption immediately after going live and over time. After onboarding users, monitor their usage. Use the prebuilt visualizations to analyze and gauge their usage patterns. If necessary, determine courses of action to align these patterns to your goals.

Expand the capabilities of Fusion Analytics to a larger group of users and additional business units. For detailed implementation guidance, see [Oracle Fusion Analytics Implementation Series: Adopting and Expanding](#).

Implement a Governance Program

Governance plays a critical role in enforcing regional compliance requirements.

A well-planned governance program can keep all your sensitive corporate data private and comply with regional compliance laws such as HIPAA or FedRAMP. It also supports data protection laws such as CCPA in California and GDPR in international markets such as the European Union, which impose strict customer data privacy and security compliance requirements on businesses. See [About Data Governance](#).

Fusion Analytics data governance involves managing and controlling data assets, including their collection, storage, use, and distribution. The goal is to ensure that Fusion Analytics data is accurate, complete, secure, and used in compliance with relevant laws and regulations. Your organization must:

- Define the scope of the Fusion Analytics data governance program and the goals you want to achieve. This involves identifying the types of Fusion Analytics data that need to be governed, the business processes and systems that use the data, and the stakeholders impacted by the program.
- Establish a data governance framework management plan, including policies, procedures, and Fusion Analytics data management standards. This framework includes roles and responsibilities for data stewards and custodians, who oversee the data's use and management.
- Develop a data governance strategy for the organization.

- Choose the best governance model for your organization.
- Build a data-driven culture.
- Develop plans for the Fusion Analytics data that needs to be governed. These plans specify the business rules and data quality metrics that must be followed.
- Implement controls and monitoring mechanisms to ensure compliance with Fusion Analytics data management plans. This includes automated data quality checks, access controls, and usage monitoring.
- Improve the Fusion Analytics data governance program by continuously monitoring and evaluating its effectiveness.

This task requires:

- Business Executives
- Project Managers
- Fusion Analytics Functional Administrators
- Fusion Analytics Security Administrators

Use the checklist to confirm that the action items are planned for. See [Implement a Governance Plan Checklist](#).

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Resources

Use the resources such as recommended training, checklists, and links to useful information to help you implement Fusion Analytics effectively.

Trainings

Oracle offers many ways for users and partner implementation teams to learn about Fusion Analytics and Oracle Fusion Cloud Applications capabilities. The implementation team members, administrators, partners, and business users must complete the trainings listed in this section before going through the implementation stages.

Visit the training offerings periodically using the Training tab on the [Oracle Analytics Community page](#).

▮ Introductory Training

The following courses are designed to help the learner understand and familiarize themselves with Fusion Analytics and its architecture. See [Getting Started with Fusion Analytics and Implementation Success](#).

▮ Administrator Training

This training enables administrators to acquire the knowledge and skills to prepare, configure, and maintain Fusion Analytics. See:

- [Fusion Analytics Administrator Workshop](#)
- [Fusion Analytics Implementation Best Practices](#)
- [Fusion Analytics On-Demand Courses for IT-Pros on Oracle University](#)
- [Fusion ERP Analytics Usage and Practices](#)
- [Fusion HCM Analytics Usage and Practices](#)
- [Oracle Analytics Cloud Enterprise Professional Certification](#)

Business User Training

Business user training for Fusion Analytics and Oracle Analytics Cloud (on-demand, live training, and replays of live training) empowers business users to use Fusion Analytics seamlessly and confidently. See:

- [Replay: End User Workshop](#)
- [Oracle Analytics Cloud On-Demand Business User Training](#)
- [Fusion Analytics On-Demand Business User Training](#)

Insight Hub

Short videos and blogs to address targeted functions (called Live Lab Sprints) and general discussion sessions (Tech Talks and Coffee Talks) also provide current and vital information. See:

- [TechTalk](#)
- [Coffee Talks](#)
- [LiveLabs Sprints](#)
- [Live Lab Sprint Videos](#)
- [Blogs](#)

Workshop Registration

Subscribe to [Cloud Customer Connect](#) to receive notifications about Fusion Analytics events. See the Training tab on the [Oracle Analytics Community page](#).

Use the checklist to confirm that the action items are planned for. See [Trainings Checklist](#).

Checklists

Use the checklists to confirm that the action items for each implementation task are completed. The checklists summarize and gather the information needed in subsequent sections and ensures that the implementation runs smoothly. Each checklist contains tasks and a checkbox to record their response.

Define the Functional Requirements Checklist

- Have all the available functional areas been reviewed?
- Have all the available subject areas been reviewed?
- Have all the available critical metrics been reviewed?
- Are there hierarchies required that are not available out of the box?
- Have security rules been confirmed?

Define the Non-Functional Requirements Checklist

- Are there data residency requirements that affect region selection?
- Are there additional security requirements?
- Are there disaster recovery requirements?
- Are there specific performance requirements?
- Are there availability requirements because Fusion Analytics has a service-level objective (SLO) of 99.9%?
- Are there scalability requirements?

Determine the Success Criteria Checklist

- Who are the key stakeholders that need to weigh in?
- What is the project budget?
- Has the schedule been determined?
- What is the project scope?

Create the Project Plan Checklist

- Is the project plan ready?
- Is resource planning completed?
- Is the project plan scheduled by activity?
- Do you have a contingency plan?
- Do you have approval from the project stakeholders?

Set Up the Support Process Checklist

- Do you have a Customer Support Identifier, and can you see Fusion Analytics in the product list?

Manage Application Updates Checklist

- Have you read and do you understand the Fusion Analytics update activities?
- Have you established a communication and scheduling plan for the updates?

Cloud Accounts Checklist

- Are you planning to follow the recommendation and use a single cloud account for Fusion Analytics and Oracle Fusion Cloud Applications?
- What is the name of the cloud account that contains the primary Oracle Fusion Cloud Applications subscriptions?

Regions Checklist

- What region is the paired Oracle Fusion Cloud Applications environment in?
- Is it a generation 1 or a generation 2 region?
- If it is generation 2, is it a supported Fusion Analytics region?
- If it is a generation 1 region or a generation 2 region that isn't supported, what is the supported generation 2 region you plan to use?

Identity Services Checklist

- Does the Oracle Fusion Cloud Applications cloud account use Oracle Identity Cloud Service or identity domains?
- If using two accounts, does the Fusion Analytics cloud account use Oracle Identity Cloud Service or identity domains?

Fusion Analytics Environments Checklist

- Have you subscribed to an additional test environment?

Environments Pairing Checklist

- What is the Oracle Fusion Cloud Applications environment paired with the additional test environment, if subscribed?
- What is the Oracle Fusion Cloud Applications environment paired with the development environment?

Oracle Fusion Cloud Applications Environments Checklist

- What is the Oracle Fusion Cloud Applications cloud account name?
- What is the name of an Oracle Fusion Cloud Applications environment used for the Fusion Analytics development or test environment?
- If subscribed, what is the Oracle Fusion Cloud Applications environment paired with the additional test environment?
- What is the name of the Oracle Fusion Cloud Applications production environment?

Compartments Checklist

- What compartment is used for the Fusion Analytics development instance?
- What compartment is used for the Fusion Analytics additional test instance if subscribed?
- What compartment is used for the Fusion Analytics production instance?

Groups Checklist

- What group contains the Fusion Analytics development administrators?
- What group contains the Fusion Analytics additional test environment administrators, if subscribed?
- What group contains the Fusion Analytics production administrators?

Policies Checklist

- Have you implemented the recommended rule for each Fusion Analytics environment?

Establish Environment Implementation Sequence Checklist

- Have you determined the resources needed for performing individual tasks from the implementation workflow?
- Have you determined an individual administrator for each of your environments?
- Do you have additional test environments?
- Have administrators prepared a migration handoff plan for migrations from development or test and additional test environments to production?

Prepare for Implementation Checklist

- Has the Fusion Analytics subscription been activated in the recommended Oracle Fusion Cloud Applications cloud account?
- If not, what is the name of the cloud account where it is activated?
- Does an Oracle Cloud Infrastructure administrator have the activation welcome email?
- Based on the documentation, what user synchronization scenario number or method must be utilized?

- If Oracle Identity Cloud Service is being used, does the administrator setting up user synchronization have the FA_GSI_ADMINISTRATOR and the IDCS Identity Domain Administrator roles?
- Are existing virtual cloud networking components used for deploying Fusion Analytics with private endpoints?
 - If so, do the components adhere to the requirements listed in the references? Is the virtual cloud network preparation complete?
- Is the virtual cloud network preparation complete?

Prepare Your Oracle Fusion Cloud Applications Checklist

- List the necessary configuration modifications and confirm whether the modifications are complete.
- List the network components requiring modification and confirm whether the modifications are complete.
- Have you configured the JSON Web Token-based authentication in Oracle Fusion Cloud Applications?

Create Fusion Analytics Instance Checklist

- What identity stripe or domain are you provisioning into?
- Is this the identity stripe or domain you signed into?
- What region are you provisioning into?
- What compartment are you provisioning into?
- What is the instance display name?
- What is the instance name?
- What is the type of environment (intended use)?
- What is the name of the Oracle Fusion Cloud Applications environment?
- What is the Oracle Fusion Cloud Applications URL?
- Are the JWT public-key certificate and private key available?
- What is the Oracle Autonomous Data Warehouse administrator password you plan to use?
- What is the notification email address for provisioning status updates?

Create Fusion Analytics Instance with Private IP Addresses (Optional)

- What is the compartment hosting the virtual cloud network?
- What is the compartment hosting the private subnet?
- What is the compartment hosting the network security group?
- What is the virtual cloud network name?
- What is the private subnet name?
- What is the network security group name?

Customize Checklist

- Have you decided which application roles are used to secure read and write access to custom reports?
- Have you created custom folders with appropriate permissions for each domain or set of users?
- Have you explained how to use their folder and the shared folder structure to authors?
- Have you reviewed the options to select the best solution for each additional data type that Fusion Analytics needs to include?
- Did you enable the descriptive flex field columns needed in the custom data application?
- Is your data coming from a source supported in data augmentation?
- Do you need to transform your additional data significantly before loading it into Fusion Analytics?
- Can data augmentation be used to modify your semantic model?
- Did you define the overall model design required for your external data for new dimensions and facts?
- Did you combine your custom facts with the ready-to-use dimensions for cross-subject area analysis?
- Did you review the ready-to-use security configurations available?
- Do you need to create security assignments for each user or not?

Test Checklist

- Are the focus areas (data, visualizations) for testing identified?
- Are testing objectives defined?
- Have you defined the development and review process for approval?
- Are functional, user, and data volume testing approaches in place?
- Do you have a plan for test data creation?
- Are defect tracking and resolution processes defined?
- Did you complete the stakeholder assessment on the testing strategy?
- Did you run through functional scenarios?
- Did you run through functional use cases?
- Is functional validation aligned with operating business processes defined?
- Are functional security roles restricting access to Fusion Analytics content, as required?
- Are functional filters and prompts working correctly and returning the expected data?
- Are cross application functional scenarios captured for testing?
- Are functional content extensions adequately tested?
- How many concurrent users load is expected?

- List the data augmentations that were reviewed.
- List the number of descriptive flex fields in the custom data application that were reviewed.
- Did you use "low service" while connecting to the autonomous data warehouse schema?
- Have you benchmarked the performance of the ready-to-use subject areas?
- Do you have customizations?
- Do you have custom schema development driven by external extraction tools?
- Have you followed semantic model best practices?
- Have you followed data augmentation best practices?
- Is the performance of the Fusion Analytics application degraded when multiple users access it simultaneously?
- Do you use any artificial intelligence and machine learning use cases as part of functional preview features?
 - If yes, then are these features tested for performance benchmarks?
- Is the performance of transactional grain reports tested to ensure they load promptly?
- How many business users are testing?
- Is the scope of user acceptance training defined?
- Are the users and roles identified for user acceptance training?
- Is the preparation of the test scenarios complete?
- Is the execution of test cases complete?
- Is testing cycle feedback collected from the begin date to the end date of user acceptance training?
- Is the scope and approach of the testing signed off?

Migrate Checklist

- Are all the required functional areas activated in the source and the target Fusion Analytics environment?
- Are all the required descriptive flexfields in the Fusion Analytics source environment enabled in the Fusion Analytics target environment?
- Does the user performing bundle migration belong to the Fusion Analytics service administrator group?
- Are the Fusion Analytics source and target environments on the same release version?

Go Live Checklist

- Is the production environment up-to-date with the latest release?
- Are the bundles, if required, migrated to production?
- Is the production environment configured?
- Are the pipelines activated and executed?
- Are users, groups, and data security contexts in place?

- Are all communication templates and distribution lists in place for issue resolution and mitigation?
- Do users understand the scope of the Fusion Analytics solution?
- Are the business user and power-user training complete?
- Are the administrators trained to handle the post-go live issues?
- Is the go live date communicated to users?
- Is there a communication plan with implementation stakeholders?
- Is there a business sign-off on the solution? Is there a change control process in place?
- Is there a plan to align external dependencies?
- Are post-go live standard operating procedures in place?
- Is there a plan for user training and adoption?
- Is there a plan to mitigate accessibility needs?
- Is there a plan to track the completion of all pre-go live change management activities?
- Have you examined the audit reports for any changes to security settings?
- Have you examined the Security Activity log?
- Have you examined the Request History log?
- Have you examined the Console Audit log?
- Have you examined the Upload Activity log?
- Have you examined the bundle activity log?
- Have you examined the Semantic Model Extensions activity log?
- Have you examined the Enable Features activity log?

Engage with Support Checklist

- Does the service request provide information about the impact on your business or the risk to your implementation plans?
- Is the severity level of the service request appropriate?
- If there is a workaround or suggestion, is it practical and appropriate?
- Is the calendar date specified in the service request after a business milestone or implementation milestone?
- Is the problem statement accurately described in the service request?

User Assistance Checklist

- Is the implementation team aware of any known issues?
- Has the implementation team reviewed Oracle Help Center?

Trainings Checklist

- Have the business users undergone training?
- Are processes developed for communicating available training?

- Have users completed the introductory training?
- Has the implementation team reviewed administrator training and best practices?
- Has the implementation partner completed the specialized training?
- Have you set targets for business users to complete the training?
- Has the team subscribed to Fusion Analytics Events?

Community Checklist

- Is the implementation team aware of the Fusion Analytics Community?
- Does the implementation team have permission to post in the Community?
- Do you have knowledge of Cloud Customer Connect?
- Do you have access to Cloud Customer Connect?
- Have you been informed of the Oracle Idea Lab, a forum-based feedback channel for submitting new ideas, commenting on existing ideas, voting for favorites, and seeing which requests have been implemented by Oracle?
- Have you signed up for Fusion Analytics events?
- Does the implementation team have access to Cloud Customer Connect?

Implement a Governance Plan Checklist

- Have you defined the scope and goals of the Fusion Analytics data governance program?
- Which data governance tool are you using?
- Have you established a Fusion Analytics data governance framework?
- Have you determined what Fusion Analytics data needs to be governed?
- Have you implemented processes to ensure Fusion Analytics data governance compliance?
- Have you developed plans to continuously improve the Fusion Analytics data governance program?

Update Fusion Analytics Checklist

- Have you read and do you understand the Fusion Analytics update activities?
- Have you established a communication and scheduling plan for the updates?
- How many Fusion Analytics user licenses do you have currently?
- What is the new number of Fusion Analytics user licenses?
- List the current application subscriptions.
- What are the new application subscriptions?

Community

The implementation team benefits from joining the Fusion Analytics community. This is a platform where Fusion Analytics users and implementors interact with one another and post questions and feature requests. The implementation team can watch for upcoming Tech

Talks, events, training, share product knowledge, and look for implementation recommendations.

See [Oracle Analytics Community](#).

Use the checklist to confirm that the action items are planned for. See [Community Checklist](#).

Oracle Help Center

Oracle Help Center is Oracle's official website that offers a variety of content and user assistance assets, including product documentation, API documentation, tutorials, hands-on labs, reference architectures, solution playbooks, best practices, integration design patterns, and videos.

Fusion Analytics Help

See [Fusion Analytics Warehouse](#).

Oracle Analytics Cloud Help

See [Analytics Cloud](#).

Oracle Cloud Infrastructure Help

See [Oracle Cloud Infrastructure Documentation](#).

Use the checklist to confirm that the action items are planned for. See [User Assistance Checklist](#).