Oracle Risk Management Cloud
Creating Analytics and Reports for Risk Management

19C
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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons 🔄 to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.
- Guides and Videos: Go to the Oracle Help Center to find guides and videos.
- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 Introducing Risk Management Reporting

Overview of Risk Management Analytics and Reports

Oracle Risk Management Cloud provides predefined subject areas from which you can build analyses, dashboards, and reports. This guide, Creating Analytics and Reports for Risk Management, documents these subject areas and discusses how to develop the reporting instruments they support:

- An analysis is a display of real-time data. It may incorporate a table, chart, or both.
- A dashboard is a set of related analyses or a combination of an analysis and parameters.
- Analytics is a generic term that encompasses analyses and dashboards.
- A report is a data snapshot formatted for printing.

Risk Management provides predefined dashboards. For Financial Reporting Compliance, Advanced Access Controls, and Advanced Financial controls, dashboards include analyses that return administrative information. An Access Certification dashboard includes an analysis that returns details of certification projects.

Risk Management also provides predefined reports available from Financial Compliance Reports and Advanced Controls Reports work areas. These are documented separately in user guides for Financial Reporting Compliance, Advanced Financial Controls, and Advanced Access Controls. They're unrelated to the analytics and reports you can develop from subject areas.

Considerations for Saving Analytics and Reports

You save analyses, dashboards, and reports in the business intelligence (BI) catalog, along with other objects, including prompts and filters. The catalog has a hierarchy of folders, starting with My Folders and Shared Folders. One important folder is Custom, which you can find in Shared Folders. Use it to store analytics and reports that you create or modify.

My Folders

You're the only one who can access anything you save in My Folders. You can see your saved items in My Folders on the Reports and Analytics work area, but not in My Folders in the Reports and Analytics pane on any other work area. The only exception is when you create an analysis using the wizard in the Reports and Analytics pane, and save it in My Folders. In this case, the analysis is available in the pane on all work areas.

Shared Folders

If you have the appropriate roles, you can also save in Shared Folders. Reports and analytics you create or modify are then available to anyone with the correct access. You should save objects in the Custom subfolder, which has subfolders organized by product family.
Custom Folder

If you have access to Shared Folders, use its Custom folder to store all analytics and reports you create or modify.

- You ensure that those objects aren’t affected during upgrades, which can change predefined analytics and reports outside the Custom folder. You might lose changes saved outside the Custom folder during upgrades.
- You can easily find your objects.
- You can edit objects in the Custom folder without compromising security on the original objects.

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

Related Topics
- Reports and Analytics Work Area and Panel Tab
- How You Create and Edit Reports
- Create and Edit Analytics

Security for Risk Management Analytics

To work with Risk Management subject areas, analytics, and reports, you must have a job role that includes at least one of the following duty roles. Each provides functional access to reporting features for the component in its name:

- Financial Reporting Compliance Transaction Analysis Duty
- Advanced Access Control Transaction Analysis Duty
- Advanced Financial Control Transaction Analysis Duty
- Access Certification Transaction Analysis Duty

Your data access is determined by data security policies mapped to roles that provide other functional access. For example, suppose you’re a controls manager for a New York business unit. You’re assigned a job role that grants access to all functionality in the Controls work area. It’s mapped to a data security policy that provides access only to controls tagged as being appropriate for the New York business unit. This data limitation applies also to your analytics and reports, even if a distinct job role gives you access to a reporting duty role.

For more on configuring functional and data access, see Risk Management Cloud: Securing Oracle Risk Management.

Synchronize Report Data

For analyses and reports to display current data, two Risk Management jobs must run regularly.

- A job called Report Synchronization applies to data for Risk Management components other than Access Certification.
- A job called Access Certification Synchronization applies to the Access Certification component of Advanced Access Controls. Among other things, it updates reporting tables with changes to Access Certification administrator, owner, and certifier assignments.
The Report Synchronization job runs, by default, once a week, on Sundays. However, you're expected to modify the default schedule. The job should run often enough to reflect the frequency of changes to the data included in your analyses and reports. In a typical environment, it runs daily.

To modify the schedule for this job:

1. Open the Scheduling page in Risk Management Tools: Select the Scheduling tab in the Setup and Administration work area.
2. Select the row that represents the Report Synchronization schedule, then click the Edit option.
3. In a Schedule Parameter dialog box, enter new values in fields, and make new selections among radio buttons, to define a new schedule. Click the Reschedule button.

The Access Certification Synchronization job begins running only when your organization creates its initial certification. At that point the job runs once a day. You're expected not to modify this schedule.

You can also run either job on demand: In the Scheduling page, select the row for the job and click the Run Now button. You can’t cancel the schedule for either job.

Flexfields in Analyses and Reports

Descriptive flexfields are fields your company defines to store details unique to its requirements. Your company can add these to records of processes, risks, controls, issues, and assessments in Financial Reporting Compliance. You can include flexfields in analyses and reports, but before you can do so, you must enable them for Transactional Business Intelligence.

Here are some preliminary considerations:

- In part, enabling flexfields for Transactional Business Intelligence involves selecting an option as you configure or edit flexfields. However, this topic does not fully discuss how to configure or edit a flexfield. For information on those tasks, see the Flexfields chapter of a guide titled Configuring and Extending Applications.
- There are three types of flexfield: key, extensible, and descriptive. However, Risk Management uses only descriptive flexfields. As you review information about flexfields in the Configuring and Extending Applications guide, you can ignore information about key and extensible flexfields.

Enable Flexfield Segments

To configure descriptive flexfields, you use the Manage Descriptive Flexfields task in the Setup and Maintenance work area. For each flexfield, you define global or context segments. Broadly, a global segment is a piece of information that becomes part of an object record under any circumstance. A context segment is a piece of information that applies only under circumstances you define as you create the flexfield.

As you create either type of segment, select a BI Enabled check box if you want that segment to be available for analyses and reports, or clear the check box if not. You can perform either action as you initially configure the flexfield, or as you edit it later.

Run Jobs to Make Flexfields Available for Reporting

When you finish configuring or editing a set of flexfields, run the Import Oracle Fusion Data Extensions for Transactional Business Intelligence process. It’s available under Scheduled Processes in the Tools work area. As you set parameters for this process, be sure to select the Risk Management check box (or the All check box) under Basic Options.
When that job finishes running, also run a Report Synchronization job. It’s available on the Scheduling page of the Setup and Administration work area of Risk Management Tools. The job is scheduled to run regularly (by default, once a week on Sundays). However, you can run it on demand: Select its row in the Scheduling page, then click a Run Now button.

### Risk Management Flexfields for Business Intelligence

This table shows the Risk Management descriptive flexfields and the subject areas in which you can use these flexfields.

<table>
<thead>
<tr>
<th>Descriptive Flexfield</th>
<th>Subject Area</th>
<th>Folder</th>
</tr>
</thead>
<tbody>
<tr>
<td>FRC_ CONTROL_DFF</td>
<td>Risk Management Cloud - Assessment Results Real Time</td>
<td>Control Details</td>
</tr>
<tr>
<td></td>
<td>Risk Management Cloud - Compliance Real Time</td>
<td></td>
</tr>
<tr>
<td>FRC_ PROCESS_DFF</td>
<td>Risk Management Cloud - Assessment Results Real Time</td>
<td>Process Details</td>
</tr>
<tr>
<td></td>
<td>Risk Management Cloud - Compliance Real Time</td>
<td></td>
</tr>
<tr>
<td>FRC_RISK_DFF</td>
<td>Risk Management Cloud - Assessment Results Real Time</td>
<td>Risk Details</td>
</tr>
<tr>
<td></td>
<td>Risk Management Cloud - Compliance Real Time</td>
<td></td>
</tr>
<tr>
<td>FRC_ISSUE_DFF</td>
<td>Risk Management Cloud - Compliance Real Time</td>
<td>Issue Details</td>
</tr>
<tr>
<td>FRC_ ASSESSMENT_ CONTROL_DFF</td>
<td>Risk Management Cloud - Assessment Results Real Time</td>
<td>Assessment Result Details</td>
</tr>
<tr>
<td></td>
<td>Risk Management Cloud - Compliance Real Time</td>
<td></td>
</tr>
<tr>
<td>FRC_ ASSESSMENT_ PROCESS_DFF</td>
<td>Risk Management Cloud - Assessment Results Real Time</td>
<td>Assessment Result Details</td>
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<td></td>
<td>Risk Management Cloud - Compliance Real Time</td>
<td></td>
</tr>
<tr>
<td>FRC_ ASSESSMENT_ RISK_DFF</td>
<td>Risk Management Cloud - Assessment Results Real Time</td>
<td>Assessment Result Details</td>
</tr>
<tr>
<td></td>
<td>Risk Management Cloud - Compliance Real Time</td>
<td></td>
</tr>
<tr>
<td>FRC_REMEDIATION_PLAN_DFF</td>
<td>Risk Management Cloud - Compliance Real Time</td>
<td>Remediation Plan Details</td>
</tr>
</tbody>
</table>
Schedule Analytics and Briefing Books

Analytics and briefing books can run based on a schedule that you define. You can set up other automated tasks, for example to deliver results to specific recipients, send notifications, or to generate a list of changes implemented today using the CURRENT_DATE repository variable. You create what’s called an agent to set this all up for an analysis, dashboard, or briefing book. The agent itself is saved as an object in the business intelligence (BI) catalog. Agents can

Creating an Agent

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas.
2. Click the Browse Catalog button.
3. Click New and select Agent in the Actionable Intelligence section.
4. Ensure that you enter information on the Delivery Content tab to specify the analysis, dashboard, or briefing book to run.
5. Save the agent in My Folders.

Note: To edit an agent, browse the BI catalog to find the agent.

Related Topics
- Reports and Analytics Work Area and Panel Tab

Schedule Reports

Reports can run based on a schedule that you define. You can set up other automated tasks, for example to deliver results to specific recipients or send notifications. You submit a report with the schedule and criteria for other automated tasks defined. If a report is set up as a scheduled process, you submit the process as you would any scheduled process. You can schedule them from:

- Any work area where there is a link to the report.
- The Scheduled Processes work area, where you can submit all processes that you have access to.
- The Reports and Analytics work area or panel tab, if the report is set up for submission from there.

Submitting a Report or Scheduled Process

Follow these steps:

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas where you can find the report.
2. Click the name of your report.
3. Click Schedule if the option is there. The report is set up as a scheduled process.
   a. Enter any parameters to avoid unnecessarily large results.
   b. Click Advanced to enter a schedule, deliver results to a specific destination (including e-mail or printer), or define criteria for sending notifications.
4. If you don't see **Schedule**, then click **View**.
   a. Click the **Actions** button for the report and select **Schedule**.
   b. Enter information similar to step 3.

**Related Topics**

- Overview of Scheduled Processes
- Reports and Analytics Work Area and Panel Tab
- View Status and Other Details for Scheduled Processes
- Submit Scheduled Processes and Process Sets
2 Analytics

Create and Edit Analytics

Create and edit analytics to provide real-time reporting on your transactional data. You can:

- Create an analysis. You may, for instance, want to track overdue assessments. Your analysis includes assessment name, state, and due date. It filters records to exclude completed assessments and include those with due dates earlier than the present date. An analysis may present information in a table, graphically, or both.
- Create a dashboard. You may, for example, group the overdue-assessment analysis together with other analyses that display other information about assessments.
- Use predefined dashboards.

Analytics display data retrieved from subject areas, which are logical groupings of columns that store individual data points.

You may use the BI catalog to create either an analysis or a dashboard. For an analysis, however, you have the option of using a wizard available in the Reports and Analytics pane.

Risk Management Subject Areas

To create real-time analyses for Risk Management, familiarize yourself with its subject areas, folders, and attributes.

Subject Areas

Financial Reporting Compliance has two subject areas:

- Risk Management Cloud - Compliance Real Time
- Risk Management Cloud - Assessment Results Real Time

The Advanced Controls Management module has three subject areas:

- Risk Management Cloud - Advanced Financial Controls Real Time
- Risk Management Cloud - Advanced Access Controls Real Time
- Risk Management Cloud - Access Certification Real Time

To create an analysis, begin by selecting a subject area containing columns of information to include in the analysis. For example, to create an analysis that displays records of overdue assessments, you would select the Risk Management Cloud - Assessment Results Real Time subject area.

The simplest and fastest way to generate an analysis is to use a single subject area. You can use more if one subject area doesn't contain all the dimension attributes and fact metrics you need. An analysis that does so is called a cross-subject area query.
Folders

Each subject area may have fact folders and dimension folders. Folders may have subfolders.

- Fact folders contain attributes that can be measured, meaning that they’re numeric values.
- Dimension folders may hold attribute columns or hierarchy columns.
  - An attribute represents a piece of information about an object. Values may be dates, IDs, or text.
  - A hierarchy contains values with parent-child relationships. For Risk Management purposes, only Perspective folders provide hierarchy columns.

Guidance in Using Subject Areas

A subject area is a collection of related data logically representing a certain functional domain in Risk Management Cloud. Each subject area is built on a star schema approach. In the center of the star is a fact, which is a metric about the information contained in the star. For example, the compliance Real Time subject area has several facts about the Process, Risk, and Control objects. Facts about the Control object, for example, include the count of controls and count of key controls.

Dimensions branch out from facts, and they define characteristics about the fact. For example, the Control object has dimensions such as Control Name, Type, and Frequency.

Risk Management objects have defined relationships to one another, and subject areas are built on star schemas that reflect these relationships. In Financial Reporting Compliance, for example:

- The Process object is the hierarchical parent of the Risk object. In the Compliance Real Time subject area, a Process fact extends to dimension details pertaining to processes and to risks.
- The Risk object is the hierarchical child of the Process object, but parent of the Control object. In the Compliance Real Time subject area, a Risk fact extends to dimension details pertaining to risks, processes, and controls.
- The Control object is the hierarchical child of the Risk object. In the Compliance Real Time subject area, a Control fact extends to dimension details pertaining to controls and to risks.
- In the Compliance Real Time subject area, Process and Control have no dimensions in common.

Assume you want to build a simple analysis that includes Process Name, Risk Name, and Control Name. Your data includes Process1 and Process2; Risk1, Risk2, and Risk3; and Control1 and Control2. Your analysis should show:

- Process1 is related to Risk1, which is related to Control1 and Control2.
- Process2 is related to Risk2 and Risk3.
  - Risk2 is related to Control1 and Control2.
  - Risk3 is related to Control2.

If you were to build the analysis without adding any facts, however, it would not return any values for Process Name. It would return one value each for Risk1 and Risk2, and for Control1 and Control2, but it would not show their relationships to other objects.

That’s because the Process star schema and the Control star schema are not related by any common dimensions. To show the proper output, you need to include a process fact and a control fact. The Process and Control stars then have a relationship through the Risk star, and so the analysis would return the proper results. If you don’t want the analysis to show the facts you have added, you can hide them.
Knowing the relationships between the objects you’re working with is key to building analyses in Risk Management. Basically, if you find an analysis doesn’t return the results you expect, try adding a fact from each dimension in your analysis one by one, until it returns the data you expect.

However, because facts are the center of a star schema and serve as a gateway between dimensions and other star schemas, one fact may override another fact and cause a join between dimensions you didn’t intend. Your best bet is to start small, run your analysis, and add to it across dimensions so that you can tweak the facts required for inclusion as you go.

Also keep the following guidelines in mind:

- In all Risk Management subject areas:
  - Change History cannot be combined with any other dimension.
  - Inaccessible Records and Worklists cannot be combined with any other dimension.
  - Unassigned Perspective cannot be combined with any other dimension.
  - Day Name attribute in the Time dimension, when queried with another dimension or fact, is displayed as a number.

- In the Risk Management Cloud - Assessment Results Real Time subject area, an Assessment Results folder contains Assessment Result Details and Control Test Plan Results subfolders. These should not be reported with any fact other than Facts - Assessment Results.

- In the Risk Management Cloud - Compliance Real Time subject area:
  - Assessment Details should not be reported along with Facts - Issue.
  - Facts - Remediation should be reported only along with the following dimensions: Issue Details, Time, and Fiscal Calendar.
  - Risk Analysis should not be reported with any fact other than Fact - Risk.
  - Process Action Item Details should not be reported with any fact other than Fact - Process.
  - Remediation Plan Details and Remediation Task Details should not be reported with any fact other than Fact - Remediation.
  - Fact - Remediation should be reported only along with the following dimensions: Remediation Task, Remediation Plan, Issue Details, Time, and Fiscal Calendar.
  - Remediation Task dimension should not be reported with any dimension or fact other than Issue, Time, Fiscal Calendar, Remediation Plan, Remediation Fact, and Issue Fact.
  - Process and Control related to a risk are displayed only when queried with Process Fact and Control Fact.
  - Process and Risk are joined through the Control Fact. To see only Process and Risk in an analysis (without Control), you must add a metric from the risk fact. (You can hide it in the analysis.)
  - Do not combine Perspective dimension and Survey Facts Results.

- In the Advanced Controls subject areas, perspective folders apply only to results. There is no way to report on perspectives associated with controls.

Also, keep in mind that subject areas have default joins:

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Default Fact Join</th>
</tr>
</thead>
<tbody>
<tr>
<td>Risk Management Cloud - Compliance Real Time</td>
<td>Control Fact</td>
</tr>
<tr>
<td>Risk Management Cloud - Assessment Results Real Time</td>
<td>Assessment Result</td>
</tr>
</tbody>
</table>
Subject Area | Default Fact Join
--- | ---
Risk Management Cloud - Advanced Financial Controls Real Time | Incident Transaction Result Details
Risk Management Cloud - Advanced Access Controls Real Time | Incident Transaction Result Details
Risk Management Cloud - Access Certification Real Time | Facts - Access Certification

The default fact for a subject area determines the join to be used when you combine dimensions. To override that default fact, you add facts. For example, you may use the Compliance Real Time subject area to create an analysis that includes Process Name and Perspective. To see perspective values assigned to processes, you need to add a metric from the Process fact; otherwise, control perspectives appear. Note, there is no way to include perspectives for more than one of the Process, Risk, and Control objects in one report, since the fact determines the perspectives to be shown.

These tips also apply to cross-subject reporting, so keep them in mind when you create an analysis that includes dimensions from, for example, the Compliance Real Time and Assessment Results Real Time subject areas.

**Analyses**

***Create and Edit Analyses Using a Wizard***

You can use a wizard that guides you through creating and editing analyses. Even though the wizard doesn't give you all available features, you can still use it to make typical changes, for example adding views or filters. For other tasks, such as creating dashboards or deleting analyses, use the advanced business intelligence features.

**Creating an Analysis**

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas.
2. Click **Create** and select **Analysis**.
3. Select the subject area that has the columns you want for your analysis.
4. Optionally, add more subject areas or remove any that you no longer need.
5. Select the columns to include, set options for each column, and click **Next**.
6. Optionally, enter a title to display for the analysis.
7. Select the type of table or graph to include, specify the layout of the views, and click **Next**.

   **Note:** At any point after this step, you can click **Finish** to go to the last step, to save your analysis.

8. Optionally, set more options for the table or graph, and click **Next**.
9. Optionally, add sorts or filters based on any of the columns you included, and click **Next**.
10. If you have a table, optionally define conditional formatting for select columns, for example to display amounts over a certain threshold in red. Click **Next**.
11. Enter the name of your analysis and select a folder to save it in.
12. Click **Submit**.
Editing an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas where you can find the analysis.
2. Select your analysis and edit it. In the Reports and Analytics work area, click More for the analysis and select Edit. In the Reports and Analytics panel tab, click the analysis, then click Edit.
3. Perform steps 4 through 10 from the preceding Creating an Analysis task, as needed.
4. To update an existing analysis, select the same name in the same folder. To save this analysis as a new copy, either name it with a new name or save it in a new folder.
5. Click Submit.

Related Topics
- Reports and Analytics Work Area and Panel Tab
- Where to Save Analytics and Reports
- How Data Is Structured for Analytics

Create and Edit Analyses with Advanced Features

Even though you can use a wizard to create or edit analyses, you might have to use advanced features for complicated analyses or specific requirements. For example, you can create view selectors so that users can toggle between views within an analysis, or define criteria for filters using SQL statements.

You can also perform other actions on analyses, for example delete them or copy and paste them within the business intelligence catalog.

Creating or Editing an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas.
2. Click the Browse Catalog button.
3. Click the New button, select Analysis in Analysis and Interactive Reporting, and select a subject area.
   Or, select your analysis in the Folders pane and click Edit.
4. Use the tabs as described in this table.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>Select and define the columns to include. Add filters.</td>
</tr>
<tr>
<td>Results</td>
<td>Add views and set options for results.</td>
</tr>
<tr>
<td>Prompts</td>
<td>Define prompts to filter all views in the analysis.</td>
</tr>
<tr>
<td>Advanced</td>
<td>View or update the XML code and logical SQL statement that the analysis generates.</td>
</tr>
<tr>
<td></td>
<td>Set options related to query performance.</td>
</tr>
</tbody>
</table>
Performing Other Actions on an Analysis

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas where you can find the analysis.
2. Select your analysis and click **Action** and select **More**.
3. Click **More** for your analysis and select the wanted action, for example **Delete** or **Copy**.

Related Topics
- Reports and Analytics Work Area and Panel Tab
- How Data Is Structured for Analytics
- Where to Save Analytics and Reports

Reporting on Transaction Control Results

You can create an analysis or a report that presents results returned by controls created in Advanced Financial Controls. If so, you must take several factors into account.

Principal among them, results returned by each control differ from the results returned by any other control. That’s because:

- A transaction model cites business objects and attributes of those objects, which supply data for analysis. Each business object is a set of related data fields from a business application; an attribute is one field within the set.
- While creating a model, a user selects result attributes. For each risky transaction it finds, the model returns a value for each of these attributes.
- Controls are developed from models, and each control inherits the result attributes selected for its model. For each incident it generates, a control returns a value for each of these attributes.

Because the selection of result attributes is unique for each control, results are incompatible across controls. So as you run an analysis or report that returns transaction control result values, you must focus on a single control.

Here’s an example:

1. Open the BI Catalog: Select Tools > Reports and Analytics, then click Browse Catalog.
2. Click New > Analysis.
4. In the Subject Areas list of the Criteria tab, expand the Advanced Control Details folder. Drag the Name dimension to the Selected Columns region.
5. Expand the Transaction Incident Result Headers folder. Drag the Result Header 1, Result Header 2, and Result Header 3 dimensions to the Selected Columns Region.
6. Click the Results tab. In the Compound Layout region, a grid displays records for all the controls you can access. In the grid, each of the dimensions you have selected is a column header, and each row identifies the attributes selected for one control.

In this example, suppose you have access to two controls. The Compound Layout grid might look like this:

<table>
<thead>
<tr>
<th>Name</th>
<th>Result Header 1</th>
<th>Result Header 2</th>
<th>Result Header 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duplicate Invoices</td>
<td>Supplier, Supplier Name</td>
<td>Payables Invoice, Amount</td>
<td>Payables Invoice, Date</td>
</tr>
</tbody>
</table>
Note that:

- The standard way to identify an attribute is to concatenate its name with the name of its business object, with a period as the delimiter. For example, "Supplier.Supplier Name" indicates the Supplier Name attribute of the Supplier business object.
- The order in which result attributes are selected for a model, and therefore for its control, is the same as the order in which they’re made available for an analysis or report. For the Duplicate Invoices control, for example, Supplier.Supplier Name is Result Header 1 because it was the first result attribute selected for the model that served as the basis of the control.
- By convention, if results include a payment-amount attribute and a payment-date attribute, the amount comes second and the date third among the result attributes. However, it’s up to your organization to enforce this convention while creating models.

7. After viewing return values for your controls, decide which control you want to select for an analysis. Make a note of its result headers. Later, you will rename result-value columns. The result headers will serve as reminders of what the new names should be.

8. Click the Criteria tab. Create a filter that selects the one control you want. For example:

   - In the Name dimension, click the menu icon (it looks like a gear) and select Filter.
   - In a Filter dialog, "Name" is selected as a Column value because you opened the dialog from the Name dimension. Specify an operator and a value to complete the filter, for example "Is equal to" and "Duplicate Invoices."
   - Click Ok to close the dialog.

9. Remove the three result-header dimensions. Open the menu for each and select Delete.

10. In the Risk Management Cloud - Advanced Financial Controls Real Time subject area, expand the Transaction Incident Result Values folder. Drag the Result Value 1, Result Value 2, and Result Value 3 dimensions to the Selected Columns region.

11. Rename the column headers. For each result value:

   - Click the menu icon and select Column Properties.
   - In a Column Properties dialog, select the Column Format tab.
   - Select the Custom Headings check box.
   - Enter a new name in the Column Heading field. For example, as you rename Result Value 1, you might enter "Supplier Name."
   - Click OK to close the dialog.

12. Click the Results tab. The grid in the Compound Layout region now displays results only for the control you selected. These results consist of return-attribute values for each incident generated by the control, rather than return-attribute names.

Link Analyses to Application Pages

An analysis can contain links to Financial Reporting Compliance pages, where you can work on items included in the analysis. For example, from an analysis that lists issues raised against high-priority risks, you might drill down to an issue so that you
can take action on it. Analyses can link to application pages concerning processes, risks, controls, remediation plans, issues, and assessments.

**Create Links**

To configure a link, you enter a URL in your analysis that is appropriate for the Financial Reporting Compliance page you want to link to. The following table lists the objects you can link to and the URL appropriate for each.

As you work with these URLs:

- Replace `<server_url>` with the URL of your instance.
- In URLs that contain object IDs, replace the ID placeholder with the identifier for an object, such as a Risk ID or a Control ID.

<table>
<thead>
<tr>
<th>Object Type</th>
<th>Sample Deep Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>MANAGE_RISKS</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeMANAGERISKS</td>
</tr>
<tr>
<td>VIEW_RISK_OBJECT</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeVIEWRISKOBJECT&amp;objKey=ObjectKey=@@{RISKID}</td>
</tr>
<tr>
<td>CREATE_RISK_OBJECT</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeCREATERISKOBJECT&amp;objKey=</td>
</tr>
<tr>
<td></td>
<td>calledByAction%3Dcreate</td>
</tr>
<tr>
<td>MANAGE_CONTROLS</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeMANAGECONTROLS</td>
</tr>
<tr>
<td>VIEW_CONTROL_OBJECT</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeVIEWCONTROLOBJECT&amp;objKey=ObjectKey=@@{CONTROLID}</td>
</tr>
<tr>
<td>CREATE_CONTROL_OBJECT</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeCREATECONTROLOBJECT&amp;objKey=</td>
</tr>
<tr>
<td></td>
<td>calledByAction%3Dcreate%3BcalledAsTaskFlow%3DY</td>
</tr>
<tr>
<td>MANAGE_PROCESS</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeMANAGEPROCESS</td>
</tr>
<tr>
<td>VIEW_PROCESS_OBJECT</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeVIEWPROCESSOBJECT&amp;objKey=ObjectKey=@@{PROCESSID}%3BcalledAsTaskFlow%3DY</td>
</tr>
<tr>
<td>CREATE_PROCESS_OBJECT</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeCREATEPROCESSOBJECT&amp;objKey=</td>
</tr>
<tr>
<td></td>
<td>calledByAction%3Dcreate</td>
</tr>
<tr>
<td>MANAGE_ISSUES</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeMANAGEISSUES</td>
</tr>
<tr>
<td>VIEW_ISSUE_OBJECT</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeVIEWISSUEOBJECT&amp;objKey=ObjectKey=@@{ISSUEID}%3BcalledAsTaskFlow%3DY</td>
</tr>
<tr>
<td>CREATE_ISSUE_OBJECT</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeCREATEISSUEOBJECT&amp;objKey=</td>
</tr>
<tr>
<td></td>
<td>calledAsTaskFlow%3DY</td>
</tr>
<tr>
<td>MANAGE_REMED_PlANS</td>
<td>https://&lt;server_url&gt;/fscmUI/faces/deeplinkobjTypeMANAGERREMEDPLANS</td>
</tr>
</tbody>
</table>
## Object Type | Sample Deep Link
--- | ---
VIEW_REMED_PLAN | https://<server_url>/fscmUI/faces/deeplinkObjectType=VIEWREMED PLAN&objKey=ObjectKey=@3D{REMISSIONPLAN ID}%3BcalledAsTaskFlow%3DY
CREATE_REMED_PLAN | https://<server_url>/fscmUI/faces/deeplinkObjectType=CREATEREMED PLAN&objKey=calledAsTaskFlow%3DY
MANAGE_ASSESSMENTS | https://<server_url>/fscmUI/faces/deeplinkObjectType=MANAGEASSESSMENTS
VIEW_ASSESSMENT | https://<server_url>/fscmUI/faces/deeplinkObjectType=VIEWASSESSMENT&objKey=ObjectKey=@3D{ASSESSMENTID}%3BAssessmentName%3D{ASSESSMENT NAME}%3BisOpenMainTask%3DY

### Add Links to Analyses

Add a link to an analysis as an action link on a column value. The following example adds an action link to the control name in a simple control listing analysis.

1. Use the Compliance Real Time subject area to create a simple analysis with Control ID and Control Name.
2. Click the menu icon (it looks like a gear) for the Control ID. Select Column Properties, and then the Data Format tab. Change the data format of the Control ID to Number (with no decimals or commas).
3. Click the menu icon for the Control Name. Select Column Properties, and then the Interaction tab. Select Action Links under Primary Interaction. Then click the plus icon. Enter a value, for example "View Control in Application," in the Link Text field. Then select Create New Action.
4. Select Navigate to a Web Page, and enter a URL. In this example, this would be:

   https://<server_url>/fscmUI/faces/deeplink?objType=VIEW_CONTROL_OBJECT&objKey=ObjectKey=@{CONTROL_ID}

   Be sure to replace <server_url> with your URL.
5. Click the Define Parameters button.
   - You might notice VIEW_CONTROL_OBJECT was replaced in the URL with {1}. The first prompt corresponds with that.
   - Click the plus icon to add one more parameter. Name it CONTROL_ID. Select the Value drop down and select column value, then select the column value drop down and select the ID, in this case: "Control Details"."Control ID"
6. Select the Hidden check box for both parameters, so that the user is not prompted to enter values.
7. Select Options, and check the option to open in a new window.

## Dashboards

### Create and Edit Dashboards

You can create and edit dashboards to determine their content and layout. In addition to objects in the business intelligence (BI) catalog, such as analyses, reports, and prompts, you can add text, sections, and more to a dashboard.
Creating a Dashboard

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas.
2. Click Browse Catalog.
3. Click New and select Dashboard under Analysis and Interactive Reporting.
4. Enter the dashboard’s name and description, and select a folder to save in.
5. With the Add content now option selected, click OK.
6. Optionally, add more pages, or tabs, within the dashboard.
7. Drag and drop items from the Dashboard Objects or Catalog pane to add content to a page.
8. Click Save.

Note: The first dashboard page is saved with the page 1 name by default. To rename this page:
   1. Click the Catalog link.
   2. In the Folders pane, select your dashboard.
   3. For page 1, click More and select Rename.
   4. Enter the new name and click OK.

Editing a Dashboard

1. Open the Reports and Analytics work area, or the Reports and Analytics panel tab if available in other work areas where you can find the dashboard.
2. Select your dashboard in the pane and click More.
3. Click Edit.
4. Perform steps 5 and 6 from the preceding Creating Dashboards task, and make other changes as needed, for example:
   - Remove content from the dashboard.
   - Drag and drop within a page to move content around.
   - Change the layout of a page.

Related Topics
- Where to Save Analytics and Reports
- Reports and Analytics Work Area and Panel Tab

Use Predefined Risk Management Dashboards

For each of Advanced Access Controls, Advanced Financial Controls, and Financial Reporting Compliance, three predefined dashboards provide administrative information. Each dashboard consists of a single analysis. The same three dashboards apply to each product, with each set displaying information about its product.

The three analyses are:
- Change History: Provides information on changes recorded in revision history for objects under the different product areas.
- Inaccessible Records and Worklists: Provides information on records and worklist items that are no longer accessible by any application user.
• Unassigned Perspective Values: Provides information about perspective hierarchies and values that aren't assigned to any object.

For Access Certification, a predefined dashboard provides an analysis called Access Certification Details. It displays details about a selected certification project. These include:

• The job roles it scopes, the users assigned each role, and the action selected for each user-role pairing.
• The certifiers and owners who participate in reviewing each user-role pairing.
• The start and due dates for the certification.

For Financial Reporting Compliance, a Related Records dashboard reports relationships you have configured between processes, risks, and controls. For example, you might relate several controls to a risk to indicate that each control plays a part in reducing the risk.

To use these dashboards and their analyses, open them from the BI catalog.

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click the Browse Catalog button.
3. In the Folders tree, navigate to Shared Folders > Risk Management > [Product Name] > Administration > [Dashboard Name].
How You Create and Edit Reports

Use reports to generate and print documents for internal operations, external business transactions, or legal requirements. To meet specific requirements, you must create or edit reports to capture different data, or present data in another way.

Report Components

Each report has components that you can modify, as described in this table:

<table>
<thead>
<tr>
<th>Report Component</th>
<th>Description</th>
<th>Tool for Modifying</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data model</td>
<td>Defines the data source, data structure, and parameters for the report. Multiple reports can use the same data model. Each report has one data model.</td>
<td>Data model editor in the application</td>
</tr>
<tr>
<td>Layout</td>
<td>Defines the presentation, formatting, and visualizations of the data. A report can have multiple layouts. Different types of layout templates are available, for example Excel and RTF.</td>
<td>Depending on the template file type:</td>
</tr>
<tr>
<td>Properties</td>
<td>Specifies formatting and other settings for the report.</td>
<td>Report editor in the application</td>
</tr>
</tbody>
</table>

What You Can Create or Edit

This table gives just a few examples of creating or editing reports.

<table>
<thead>
<tr>
<th>Task</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit the layout of a report.</td>
<td>Add your company logo to the report output.</td>
</tr>
<tr>
<td>Add a new layout to a report.</td>
<td>Design a new layout template that provides less detail than the existing template.</td>
</tr>
<tr>
<td>Edit a data model.</td>
<td>Add two fields to the data model used by a report so you can add those new fields to a layout for the report.</td>
</tr>
<tr>
<td>Create a new report based on a new data model.</td>
<td>Create a new data model based on data from an external system, and create reports using the data model.</td>
</tr>
</tbody>
</table>
Create Reports

As you create a report, you may select either a data model or a subject area as the data source for the report. If you plan to use a data model, ensure that one has been created before you begin to develop the report. Risk Management doesn’t provide predefined data models.

Create a Report

1. Open the Reports and Analytics work area, or the Reports and Analytics pane in other work areas, if it’s available there.
2. Click Create and select Report.
3. By default, a wizard prompts you to select a data model. Either do so, or click a Use Subject Area button and then select a subject area.
4. To continue using the wizard, accept the default Guide Me option and click Next. (You may instead opt to close the wizard and use a report editor.)
5. Select a report layout and click Next.
6. Select columns from your data source. Also decide whether to display or hide a row of total values. Then click Next.
7. In a final pane, accept a default View Report option and click Finish. (You may instead open the layout editor so that you can make further modifications.)

Set Up Access

You or your administrator can:

- Create a job definition so that users can run your report as a scheduled process.
- Set up the report for scheduling in the Reports and Analytics pane.
- Secure general access to your report and its job definition, if any.

Data Models

Modify Data Models

A data model defines where data for a report comes from and how that data is retrieved. If a data model can’t give you all the data that you need in your report, then you can either copy and edit an existing data model or create a new one. You must be a BI Administrator to create new data models.
Creating a Data Model

1. In the business intelligence (BI) catalog, click the New button and select Data Model in Published Reporting.
2. Optionally click the Data Model node in the Data Model pane to set properties for the data model.
3. Click the Data Set node in the Data Model pane to create or edit data sets, which determine where and how to retrieve data.
4. Click the New Data Set button and select a data set type. It’s best practice to use the BI repository as a data source, so you should select either:
   - Oracle BI Analysis: To use columns from a selected analysis.
   - SQL Query: To use a Query Builder tool to define what to use from the repository. Select Oracle BI EE as the data source.
5. Optionally, to limit the data included in the report output, click the Parameters node in the Data Model pane to define variables that users can set when they use the report.

   Note: The order of parameters is important if there are job definitions defined for reports that use your data model. If you change the order in the data model, you must also update the job definitions.

6. Optionally, define other components of the data model.
7. Click Validate to validate your data model. Errors and warnings pertaining to query performance are displayed. In case of errors in validation, the model is usable in development, but will not be available in production until errors are resolved.
8. Save your data model.

Editing a Data Model

1. To edit a predefined data model:
   a. Find the data model in the BI catalog and click Copy.
   b. Paste within Shared Folders > Custom in a subfolder that has a folder path similar to the folder that stores the original data model.
   c. For the data model you pasted, click More, and select Edit.
2. Optionally click the Data Model node in the Data Model pane to set properties for the data model.
3. Click the Data Set node in the Data Model pane to create or edit data sets.
   Most predefined data models are of type SQL Query, and are set up to get application data from the following tables:
   - ApplicationDB_FSCM: Financials, Supply Chain Management, Project Management, Procurement, and Incentive Compensation
   - ApplicationDB_CRM: Sales
   - ApplicationDB_HCM: Human Capital Management
4. Perform steps 5 through 8 from the preceding Creating a Data Model task, as needed.

Related Topics
   • How You Access and Modify Report Components
   • How You Set Up Reports to Run as Scheduled Processes
   • How Data Is Structured for Analytics
Layouts

Create and Edit Report Layouts

The layout determines what and how data is displayed on report output. Each report has at least one layout template. This topic describes the following aspects of report templates:

- Layout templates
- Layout template types
- Overall process of managing layouts
- Deleting layout templates

Layout Templates

To modify a layout, you edit the layout template, which:

- Defines the presentation components, such as tables and labeled fields.
- Maps columns from the data model to these components so that the data is displayed in the correct place.
- Defines font sizes, styles, borders, shading, and other formatting, including images such as a company logo.

Layout Template Types

There are a few types of template files to support different report layout requirements.

- **RTF**: Rich text format (RTF) templates created using Microsoft Word.
- **XPT**: Created using the application’s layout editor, these templates are for interactive and more visually appealing layouts.
- **eText**: These templates are specifically for Electronic Data Interchange (EDI) and electronic funds transfer (EFT) information.

You can also create and edit other types of templates using Adobe PDF, Microsoft Excel, Adobe Flash, and XSL-FO.

Overall Process to Create or Edit Layouts

Editing or creating report layout, for example using Microsoft Word or the layout editor, involves making the actual changes to the template file. But that task is just one part of the entire process for modifying layouts.

1. Copy the original report and save the new version in **Shared Folders > Custom** in the business intelligence (BI) catalog. You create or edit templates for the new copy of the report.

   **Tip:** You can use the Customize option if the original is a predefined report.

2. Review report settings for online viewing.
3. Generate sample data for the report.
4. Edit or create the layout template file.
5. Upload the template file to the report definition. Skip this step if you’re using the layout editor.
6. Configure the layout settings.
Deleting Layout Templates
To remove a layout template for a report:

1. Select your report in the BI catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. Select the layout template and click **Delete**.

Make Reports Available for Online Viewing
Some reports are set up so that you can only view them through another application or submit them as scheduled processes. To view your report online while you’re editing it, you must define a few settings. When you’re done editing your report, make sure that you reset these settings as needed.

Updating Report Properties

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **Properties**.
3. In the Report Properties dialog box, select **Run Report Online** and deselect **Report is Controlled by External Application**.

Updating Layout Settings

1. Back in the report editor, click **View a list**.
2. Make sure that the **View Online** check box is selected.

Related Topics
- How You Access and Modify Report Components

Generating Sample Report Data: Procedure
Depending on the type of report layout changes you’re making, sample data can be required or optional. You generate sample data, and then load it for use with your layout so that you can map data fields to layout components. For example, for the Start Date table column in your layout, you can set it so that the data displayed in that column comes from the Start Date field in the sample data.

You can generate sample data from the:

- Report data model
- Report viewer
- Scheduler

Generating Sample Data from the Data Model
Follow these steps:

1. Select your data model in the business intelligence (BI) catalog and click **Edit**. Alternatively:
   a. In the catalog, find the report to generate sample data for and click **Edit**.
   b. Click the data model name in the report editor.
2. In the data model editor, click View Data.
3. Enter values for any required parameters, select the number of rows to return, and click View.
4. To save the sample data to the data model, click Save As Sample Data.
   If you’re designing a .rtf template, click Export to save the file locally.
5. Save the data model.

Saving Sample Data from the Report Viewer
For reports that are enabled for online viewing, you can save sample data from the report viewer:
1. Select the report in the BI catalog.
2. Click Open to run the report in the report viewer with the default parameters.
3. On the Actions menu, click Export, then click Data.
4. Save the data file.

Saving Sample Data from the Scheduler
For reports that are enabled for scheduling (not necessarily as a scheduled process), you can save sample data from the scheduler:
1. Select the report in the BI catalog.
2. Click Schedule.
3. On the General tab, enter values for any report parameters.
4. On the Output tab, ensure that Save Data for Republishing is selected.
5. Click Submit.
7. On the global header, click Open, then click Report Job History.
8. Select your report job name in the Job Histories table.
9. On the details page, under Output and Delivery, click the XML Data Download icon button.

Related Topics
- How You Access and Modify Report Components

Create and Edit Report Layout Templates Using the Layout Editor
The layout editor in the application provides an intuitive, drag-and-drop interface for creating pixel-perfect reports with PDF, RTF, Excel, PowerPoint, and HTML output. The layout template files you create with this tool have an .xpt extension. The layout editor tool is the only editing tool that provides dynamic HTML output. Users can interact with this output in a browser, for example by sorting, applying filters, and so on.

Prerequisite
Make sure that sample data is generated from the data model that your report is using.

Using the Layout Editor
To create or edit XPT templates:
1. Select the report in the business intelligence (BI) catalog and click Edit.
2. In the report editor, click Edit to update a template.
   Or, click Add New Layout and select a template type in the Create Layout section.
3. Create or edit the layout.
4. Click **Save** to save the layout to the report definition.

**Related Topics**
- How You Access and Modify Report Components

## Set Up for RTF and Excel Report Layout Templates

You can use Microsoft Word or Microsoft Excel to create or edit RTF and Excel layout templates, in addition to the layout editor in the application. If you use Word or Excel directly, you must download and install the appropriate add-in so that the Microsoft application has the features you need to design report layouts.

**:Note:** If you’re designing a new layout for your report, consider using the layout editor instead unless you are an experienced layout designer.

### Installing the Add-In

1. Open the Reports and Analytics work area.
2. Click the **Browse Catalog** button.
3. Click **Home**.
4. In the Get Started pane, click **Download BI Desktop Tools**.
5. Select the add-in for the type of template you’re working with.
   - **Template Builder for Word**: RTF templates
   - **Analyzer for Excel**: Excel templates
6. Save and then run the installer.

### Protecting Reports by Using Passwords

You can assign a password to your report and protect it from unwanted access. You can do this by setting the runtime properties at the server level using the Runtime Configuration page. The same properties can also be set at the report level, from the report editor’s Properties dialog. If different values are set for a property at each level, then report level takes precedence.

The following table describes the properties you can use to set passwords for reports in different formats.

<table>
<thead>
<tr>
<th>Report Format</th>
<th>Property Name</th>
<th>Description</th>
<th>Default</th>
<th>Configuration Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>DOCX output</td>
<td>Open password</td>
<td>Use this property to specify the password that report users must provide to open any DOCX report.</td>
<td>NA</td>
<td>docx-open-password</td>
</tr>
<tr>
<td>PPTX output</td>
<td>Open password</td>
<td>Use this property to specify the password that report users must provide to open any PPTX report.</td>
<td>NA</td>
<td>pptx-open-password</td>
</tr>
<tr>
<td>XLSX output</td>
<td>Open password</td>
<td>Use this property to specify the password that report users must provide to open any XLSX report.</td>
<td>NA</td>
<td>xlsx-open-password</td>
</tr>
</tbody>
</table>
Create and Edit RTF Report Layout Templates

An RTF template is a rich text format file that contains the layout instructions to use when generating the report output. Use Microsoft Word with the Template Builder for Word add-in to design RTF templates.

Prerequisites
Install the Template Builder for Word add-in, and generate sample data.

Using Template Builder for Word
To modify an RTF template:

1. If you are editing an existing layout:
   a. Select your report in the business intelligence catalog and click Edit.
   b. In the report editor, click the Edit link of the layout to download the RTF file.

   If you are creating a new layout, skip this step.

2. Open the downloaded RTF template file in Microsoft Word. Or, if you’re creating a new template, just open Microsoft Word.

3. Load the sample data that you generated.

4. Edit or create the layout template.

5. Save the file as Rich Text Format (RTF).

Related Topics
• How You Access and Modify Report Components

Upload the Layout Template File to the Report Definition
If you’re creating or editing a report layout using the layout editor, the layout is automatically saved to the report definition, so you can skip this step. For all other layout types, for example RTF, upload the template file to the report definition after you’re done making layout changes.

Uploading the Template File

1. Select your report in the business intelligence catalog and click Edit.
2. In the report editor, click View a list.
3. In the table that lists the layouts, click Create.
4. Click **Upload** in **Upload or Generate Layout**.
5. In the Upload Template File dialog box:
   a. Enter a layout name.
   b. Browse for and select the layout template file that you created or edited.
   c. Select the template file type.
   d. Select the locale, which you can't change once the template file is saved to the report definition.
   e. Click **Upload**.
6. Save the report definition.

**Related Topics**
- How You Access and Modify Report Components
- eText Report Layout Templates: Explained

## Configure Layout Settings for Reports

As part of creating or editing layout, you can set report properties related to layout. These settings determine, for example, which layouts users can choose from when viewing or scheduling the report. The settings apply only to your report.

### Setting Layout Properties

1. Select your report in the business intelligence catalog and click **Edit**.
2. In the report editor, click **View a list**.
3. Set layout properties, some of which are described in this table.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Usage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Output Formats</td>
<td>Depending on the requirements for a report, you may want to limit the output file formats (for example, PDF or HTML) that users can choose. The available output formats vary depending on the template file type.</td>
</tr>
<tr>
<td>Default Format</td>
<td>When multiple output formats are available for the report, the default output format is generated when users open the report in the report viewer.</td>
</tr>
<tr>
<td>Default Layout</td>
<td>When multiple layouts are available for the report, you must select a default layout to present it first in the report viewer.</td>
</tr>
<tr>
<td>Active</td>
<td>Active layouts are available for users to choose from when they view or schedule the report.</td>
</tr>
<tr>
<td>View Online</td>
<td>Select this check box so that layouts are available to users when they view the report. Otherwise, the layout is available only for scheduling the report.</td>
</tr>
</tbody>
</table>

4. Click **Save Report**.

**Related Topics**
- How You Access and Modify Report Components
Glossary

analysis
A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.

analytics
Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

briefing book
A collection of static or updatable analyses or dashboard pages that you can download, print, and share with others.

business intelligence catalog
The repository where all business intelligence objects, including analyses, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and modified objects.

business intelligence repository
The metadata that determines all of the columns, or pieces of data, that you can include in analytics. You can also use the repository as a source of data for reports.

dashboard
A collection of analyses and other content, presented on one or more pages to help users achieve specific business goals. Each page is a separate tab within the dashboard.

ETI
A page that provides quick access to key tasks and summary information for various objects within a functional area of interest.

data model
The metadata that determines where data for a report comes from and how that data is retrieved.

EDI
Abbreviation for electronic data interchange.

EFT
Acronym for Electronic Funds Transfer. A direct transfer of money from one account to another, such as an electronic payment of an amount owed a supplier by transferring money from a payer’s disbursement bank account into the supplier’s bank account.
**job definition**  
The metadata that determines what a job does and what options are available to users when they submit the scheduled process. A job is the executable for a scheduled process.

**prompt**  
A parameter that you set when you use analytics, limiting the data in the analysis or in all analyses on the dashboard or dashboard page (tab).

**report**  
An output of select data in a predefined format that’s optimized for printing.

**scheduled process**  
A program that you run to process data and, in some cases, generate output as a report.

**subject area**  
A set of columns, or pieces of data, related to a specific business object or area.

**view**  
A specific way to present the results of an analysis, for example as a table or graph. Other types of views, such as the title view, show other components of the analysis.

**work area**  
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.