

# Oracle Fusion Cloud SCM

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## **Creating and Administering Analytics and Reports for SCM**

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# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

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# 1 Overview

## About This Guide

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

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

## Overview of Transactional Business Intelligence

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

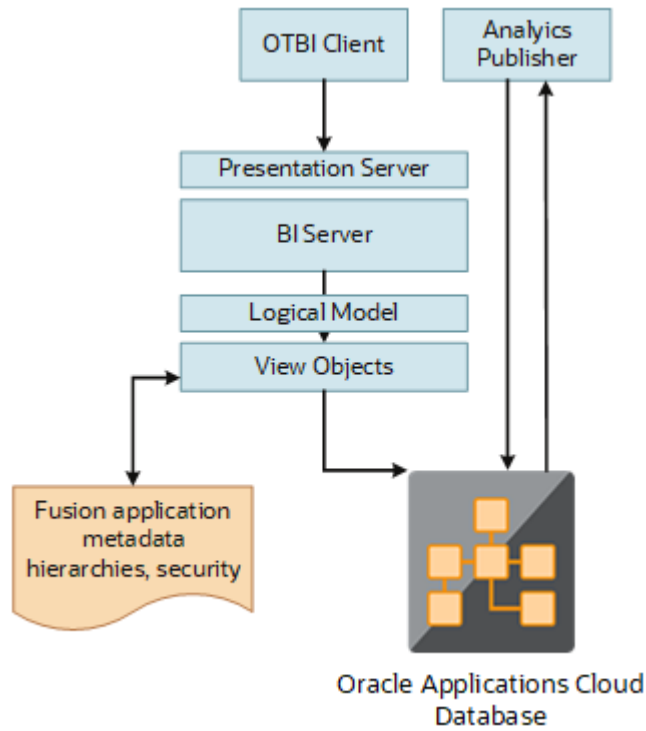
Key metrics and attributes of your business and organization are organized into subject areas of data you use as building blocks to answer your business questions.

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

## Architecture

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

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



Here's the OTBI architecture.

## BI Objects and Tools

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

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



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

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

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

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

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

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

#### Related Topics

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

## More About Oracle Transactional Business Intelligence Components

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

## Oracle Transactional Business Intelligence

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

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

*Creating Analyses and Dashboards in Oracle Transactional Business Intelligence*

- Administer analyses, dashboards, and other content.

*Administering Oracle Transactional Business Intelligence*

## Oracle Analytics Publisher

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

- Run and view reports.

*Using Oracle Analytics Publisher in Oracle Transactional Business Intelligence*

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

*Designing Pixel-Perfect Reports in Oracle Transactional Business Intelligence*

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

*Administering Oracle Analytics Publisher in Oracle Transactional Business Intelligence*

# Overview of Creation and Administration of SCM Analytics and Reports

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

## Types of Business Intelligence

This table describes the purpose of analyses and reports.

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

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

For a list of predefined analyses and reports, see *SCM Reports and Analyses*

## Modification of Analyses and Reports

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

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

## Setup and Administration

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

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

# Security Overview of SCM Analytics and Reports

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

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

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

## Related Topics

# View Analytics, Reports, and Dashboards



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

## View Analytics in Infolets

Use your favorite infolet pages to find analytics.

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

## View Objects in Familiar Work Areas and Pages

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

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

## View Objects in the Reports and Analytics Work Area

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

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

1. Click **Navigator > Tools > Reports and Analytics**.

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

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

## View Analyses

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

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

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

## View Grouped Analyses in Dashboards

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

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

## View Reports

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

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

## BI Administrator Permissions

If you're an Administrator you have lots of permissions already. But you might want to perform high-level tasks in BI as well. To get these extra permissions you need the BI Administrator role. BI Administrators have access to these additional things:

- Catalog groups
- Privileges
- Sessions
- Publisher scheduling and delivery

## Assign the BI Administrator Role

1. Sign in as a Security Manager. For example, IT\_SECURITY\_MANAGER.
2. Click **Tools > Security Console**.
3. Select the **Roles**.
4. Click **Create Role**.

5. Fill in the required information.

This is the Create Role page for entering basic information.

Basic Information | Function Security Policies | Data Security Policies | Role Hierarchy | Segregation of Duties | Users | Summary

### Create Role BI Admin Job Role : Basic Information

Back Next

\* Role Name: BI Admin Job Role

\* Role Code: BI\_ADMIN\_JOB\_ROLE1

\* Role Category: Default

Predefined role

Description: BI admin job role to provide BI access to users

6. Click **Next** until you come to the Role Hierarchy page.
7. Click the Plus icon to bring up the Add Role Membership page.
8. Search All for BI Administrator Role.

This is the Add Role Membership page for creating roles.

ORACLE

### Add Role Membership

\* Search: All | bi admin

Search Results (0)  
No data to display.

Roles

- BI Administrator Role

Add Role Membership Cancel

9. From the search result select BI Administrator Role and click **Add Role Membership**.
10. Click **Next** until you get to the Users page.
11. Add the users that you want to have the BI Administrator role. You can assign the BI administrator role to users later too.
12. Click **Next**.
13. Click **Save and Close**.

## Assign Additional Users

After the BI Administrator role is created you can assign additional users to the same role.

1. Sign in as a Security Manager. For example, IT\_SECURITY\_MANAGER.

2. Click **Tools > Security Console**
3. Select the **Users** tab.
4. Search for the user to be assigned the BI Administrator role.
5. Select the user and choose **Edit**.
6. Click **Add Role**.
7. Search for the BI Administrator role you created in the steps for Assigning the BI Administrator Role.
8. Click **Done**.
9. Click **Save and Close**.

*Related Topics*

- [Assigning access permissions](#)



## 2 Setup and Management

### Set Up Currency

#### Currency and Exchange Rate Settings for Analytics

CX Sales applications let you to decide how currency is shown in the application and set preferences for how analytics show currency for different regions and calculate exchange rates.

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

There are three ways you set up currency:

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

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

#### Set General User Currency

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

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

#### Set Analytics Currency

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

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

This shows the currency display options for users:

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

## Set a Default Currency Conversion Option for All Users

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

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

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

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

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

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

## Set a Global Currency Conversion Profile

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

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

### Related Topics

- [Update Existing Setup Data](#)

## Define Currency Profile Values

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

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

## How User Preferred Currency Exchange Works

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

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

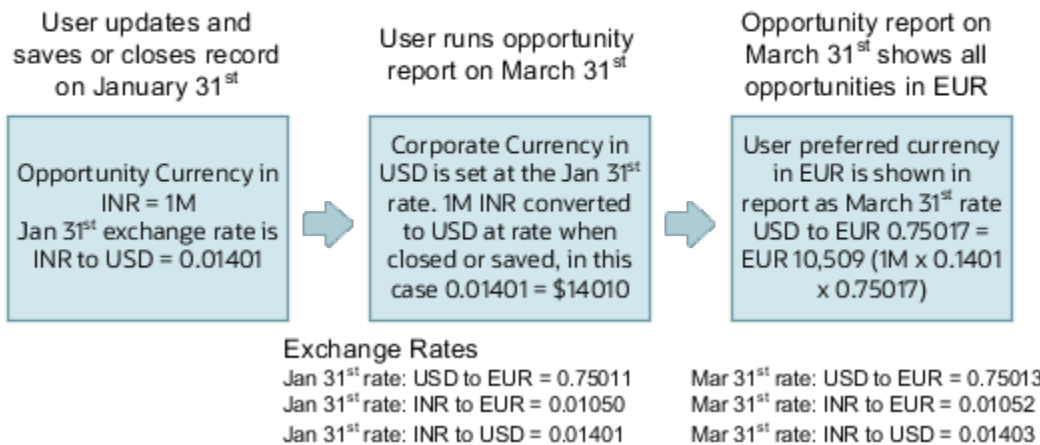
## User Preferred Currency using Simple Currency Management

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

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

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

### Example of User Preferred Currency using Simple Currency Management:



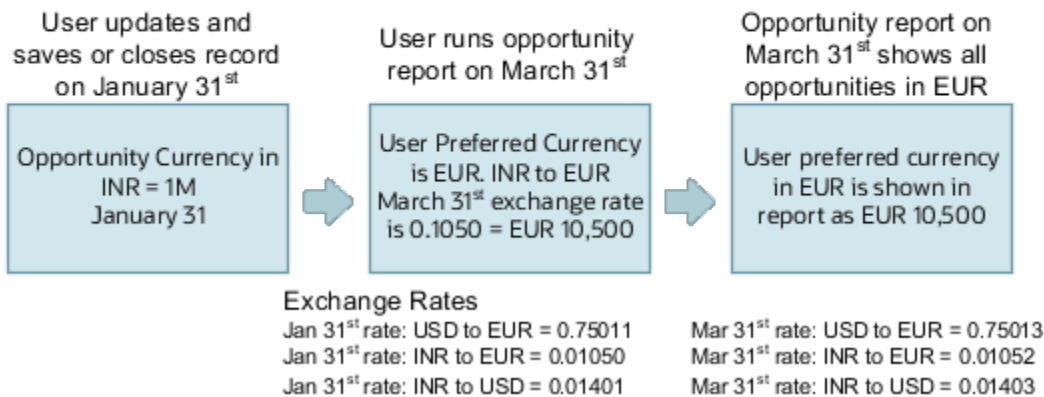
## User Preferred Currency using Advanced Currency Management

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

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

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

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



## Why do I see amounts of zero in analyses?

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

## Create the Treasury Conversion Rate Type

You must create a conversion rate type with the name 'Treasury' to generate reports with constant dollar related data.

You can create this conversion rate from the Currency Rates Manager page.

Based on your access permissions, you can access this page either from the

- Period Close work area; or
- Functional Setup Manager, with tasks like the Manage Conversion Rate Types and Manage Daily Rates.

For example, to create the Treasury conversion rate from the Period Close work area:

1. In the Navigator, click Period Close.
2. In the Period Close work area, from the Tasks panel, select Manage Currency Rates.
3. From the Actions menu, select Add Row and create the new conversion rate type with the name Treasury.
4. On the Daily Rates tab, enter the currency rates for the Treasury conversion rate type.

**Note:** You must set up the constant dollar conversion rate from every currency to CD for all dates in a year. During currency conversion, the "From" currency is taken from the transaction and the "To" Currency will always be CD for constant dollar.

## Map to Work Areas

### Set Up the Reports and Analytics Panel Tab

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

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

#### Map and Remove Objects from Your Work Area

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

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

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

#### Map and Remove Objects from Any Work Area

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

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

9. Click **Save**.

#### Related Topics

- [Why can't I see analytics and reports when I edit settings for the Reports and Analytics panel tab?](#)
- [Why can't I see analytics and reports when mapping to work areas for the Reports and Analytics panel tab?](#)
- [Set Up Reports for Scheduling](#)
- [Update Existing Setup Data](#)

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

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

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

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

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

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

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

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

## Scheduled Processes

### Create Job Definitions to Run Reports as Scheduled Processes

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

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

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

## Create Job Definitions

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

1. In the Setup and Maintenance work area, go to the **Manage Enterprise Scheduler Job Definitions and Job Sets** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area.

**Note:** If you don't see the task, make sure that the Enterprise Scheduler Job Definitions and Job Sets feature is enabled at the offering level.

2. On the Manage Enterprise Scheduler Job Definitions and Job Sets page, click the Manage Job Definitions tab.
3. Click the **Create** icon.
4. Fill in the Job Definition section.

Field or Check Box	What You Do
Display Name	Enter the name that users see and select to submit the scheduled process.
Name	Enter a name with only alphanumeric characters, for example, <b>AtkEssPrograms1</b> . It can't have spaces or any special characters.
Job Application Name	Select the application to associate the job definition with. What you select depends on the task you're using. <ul style="list-style-type: none"> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications: Select <b>CrnEss</b>.</li> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications: Select <b>FscmEss</b>.</li> <li>○ Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications task: Select <b>EarHcmEss</b>.</li> </ul>
Enable submission from Enterprise Manager	Make sure you don't select this check box.
Job Type	Select <b>BIPJobType</b> . Don't select any other type.
Default Output Format	Select the output format users get by default when they submit the scheduled process.
Report ID	Enter the path to the report in the BI catalog, starting with the folder within Shared Folders, for example: <b>Custom/&lt;Family Name&gt;/&lt;Product Name&gt;/&lt;Report File Name&gt;.xdo</b> .  Make sure to include the <b>.xdo</b> file extension for the report definition.
Enable submission from Scheduled Processes	Leave the check box selected.



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

When you create a job definition, a privilege with the same name as the job definition is automatically created with a Run prefix. For example, for a job definition named MyProcess1, with display name My Process, the privilege code is RUN\_MYPROCESS1, with Run My Process as the name. Make sure to use the Security Console to assign this privilege to roles so that users who need to run the process can do so.

#### Related Topics

- [Define Parameters for Job Definitions](#)
- [Update Existing Setup Data](#)
- [Configure Offerings](#)
- [Manage List of Values Sources](#)
- [Edit Job Definitions](#)

## Define Parameters for Job Definitions

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

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

- Functional Area: Application Extensions or a product-specific functional area
- Task: Manage Enterprise Scheduler Job Definitions and Job Sets

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

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

- `P_START_DATE`
- `P_END_DATE`
- `P_CURRENCY`

You create parameters as follows:

- Start Date
- End Date
- Currency

### Defining Parameters: Job Definitions

To define parameters while creating or editing job definitions:

1. On the Manage Job Definitions page, open the Parameters sub tab.
2. Click **Create**.

3. Enter the parameter prompt that users see when they submit the scheduled process.
4. Select a data type and configure how the parameter and the data entered are displayed, as described in this table.

Data Type	Fields
Boolean	Select this if you want the parameter to be a check box.  Select <b>True</b> or <b>False</b> to determine if the check box is selected or not.
Date or time	Select <b>Date and time</b> or <b>Date only</b> option.  Select a value from the <b>Default Date Format</b> .  <b>Note:</b> Make sure the format you select here is the same as the format used for the job. If the job definition type is BIPJobType, select <b>yyyy-MM-dd</b> , and make sure the data model for the corresponding Oracle Analytics Publisher report is using the same date format.
Number	Select a <b>Number Format</b> .  Select <b>Left</b> or <b>Right</b> for data alignment.
String	Select a <b>Page Element</b> .  Select <b>Text box</b> if you want the user to provide a text.  Select <b>Choice list</b> if you want a list with limited options (maximum 10). If there are more than 500 values, users will get an error when they try to set the parameter as part of submitting the scheduled process.  Select <b>List of values</b> if you want a list with unlimited options with a search facility.

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

## Dependent Parameters

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

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

### Related Topics

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

## Set Up Reports for Scheduling

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

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

## Enable a Report for Scheduling

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

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

### Related Topics

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

# Configure Deep Links

## Register Business Intelligence to Support Deep Linking

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

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

### Register Business Intelligence Server as a Third-Party Application

To register the BI Server:

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

#### Related Topics

- [Manage Integration of Additional Applications](#)

## Create Deep Links

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

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

**ID**=@{2}&action=@{3}&returnApp=AnalyticsApp&returnAppParams=PortalGo%26path=</shared/Custom/<folder>/@{6}

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

For personal analyses stored in My Folders: **//<hostname>/fscmUI/faces/deeplink?**

**objType=@{1}&objKey=<object**

**ID**=@{2}&action=@{3}&returnApp=AnalyticsApp&returnAppParams=PortalGo%26path=/users/@{5}/@{6}

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

Name	Prompt	Type of Value	Value	Fixed	Hidden	Notes
1	Object Type	Value	<Object Type>	Selected	Selected	Used for shared and personal analyses.
2	<Prompt Name>	Column Value	Column Name in "<table . name>" format	Selected	Selected	Used for shared and personal analyses.
3	Action	Value	edit	Selected	Selected	Used for shared and personal analyses.
4	returnApp	Value	AnalyticsApp	Selected	Selected	Used for shared and personal analyses.
5	Logged in User	Session Variable	USER	Selected	Selected	Session variable parameter used for personal analysis permissions.
6	Report Name	Value	Analysis Name	Selected	Selected	Used for shared and personal analyses. The name of the analysis to return to after working in the transactional page.

Name	Prompt	Type of Value	Value	Fixed	Hidden	Notes

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

*Related Topics*

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

## Deep Links for SCM

You can use deep links to open pages without navigating through the menu structure. When you add deep links to a business intelligence report or a company website, users can simply click those links to go directly to the application pages they need to.

### SCM Deep Links

This table lists the deep links you can add to SCM application pages.

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Channel Revenue Management	Manage Customer Claims (CUSTOMER_CLAIM,NONE)	Opens the Manage Claims page to review customer claims.	None	None	None
Channel Revenue Management	Customer Claim (CUSTOMER_CLAIM, EDIT)	Opens a specific customer claim on the Claim details page.	ClaimId: Unique identifier for the channel claim.  ClaimNumber: Unique identifier for the channel claim that is available in the UI.	ClaimId and ClaimNumber are available from Channel Claims REST.  ClaimNumber is available in the Manage Claims UI and Claim detail UI in Supplier Channel Management.  Query CLAIM_ID, CLAIM_NUMBER columns from CJM_CLAIMS_ALL table.	None
Collaboration Messaging Framework	Collaboration Message: {MESSAGEGUID} (B2B_MESSAGE_	Opens a specific message on the View Details page.	MessageGUID	Message ID column in Manage Collaboration Messaging History page in Collaboration	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
	TRANSACTIONS, VIEW)			Messaging Work Area or MessageGUID in the b2bMessageTransaction REST Service.	
Configurator	Workspace (CONFIGURATOR, EDIT)	Opens a specific configurator workspace on the Edit Workspace page.	workspaceld: Unique identifies of the workspace.  Name: Unique name of the workspace.	Retrieve the workspace name value from the Name column on the Manage Workspaces page in the Configurator Models work area.  Workspaceld retrieved from the configurator Workspaces REST API that uniquely identifies a configurator workspace.	If both the workspaceld and name parameters are passed, workspaceld is used.
Configurator	Overview (CONFIGURATOR, OVERVIEW)	Opens the Configurator Overview page.	Not needed	N/A	None
Configurator	Overview (CONFIGURATOR, NONE)	Opens the Configurator Overview page.	Not needed	N/A	None
Costing	Fiscal Document (INBOUND_FISCAL_DOCUMENT,VIEW)	Opens a specific fiscal document on the Inbound Fiscal Documents details page.	pDocHeaderId: Unique identifier of the fiscal document header.  pAccessKeyNum: Indicates the access key number generated by issuer for each electronic fiscal document.	<ul style="list-style-type: none"> <li>REST</li> <li>OTBI</li> <li>CMF_FISCAL_DOC_HEADERS.DOCUMENT_HEADER_ID</li> <li>CMF_FISCAL_DOC_HEADERS.ACCESS_KEY_NUMBER</li> </ul>	You should pass any one of the two parameters. If both the parameters are passed, the deep link would be displayed using pDocHeaderId.
Costing	Review Work Order Costs (WORK_ORDER_COST, VIEW)	Opens a specific work order on the Review Work Order Costs page.	pCostOrgId: Unique identifier of the cost organization.  pCostBookId: Unique identifier of the cost book.  pCostBook: Code associated with the cost book.  pCstWorkOrderId: Unique identifier of	<ul style="list-style-type: none"> <li>SOAP services. .</li> <li>CST_COST_ORGS_V.COST_ORG_ID.</li> <li>CST_COST_BOOKS_B.COST_BOOK_ID</li> <li>CST_COST_BOOKS_B.COST_BOOK_CODE</li> </ul>	Mandatory parameters for deep links: <ul style="list-style-type: none"> <li>pWorkOrderId or</li> <li>pCstWorkOrderId or</li> <li>pWorkOrderNumber and pOrgCode</li> </ul> Optional parameters: <ul style="list-style-type: none"> <li>pCostOrgId: If not passed, then this is derived</li> </ul>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			the work order in costing.  pWorkMethodCode: Code indicating the work method.  pWorkOrderNumber: User-facing identifier of the work order.  pOrgCode: Code indicating the manufacturing organization.  pWorkOrderId: Unique identifier of the work order in manufacturing.	<ul style="list-style-type: none"> <li>CST_WORK_ORDERS.CST_WORK_ORDER_ID</li> <li>WIE_WORK_ORDERS_B.WORK_ORDER_ID</li> <li>WIE_WORK_ORDERS_B.WORK_ORDER_NUMBER</li> <li>INV_ORG_PARAMETERS.ORG_CODE</li> <li>WIS_WORK_METHODS_B.WORK_METHOD_CODE</li> </ul>	internally using manufacturing organization linked to the work order. <ul style="list-style-type: none"> <li>pCostBookId/ pCostBook: If none among these two are passed, then pCostBookId is set internally to primary cost book of the cost organization.</li> <li>pWorkMethodCode: If not passed, then this is derived internally using the work order details.</li> </ul>
Costing	Review Item Costs (ITEM_COSTS,VIEW)	Opens a specific item cost on the Review Item Costs page.	pCostOrgId: Unique identifier of the cost organization.  pCostBookId: Unique identifier of the cost book.  pCostBook: Code associated with the cost book.  pInventoryItemId: The unique identifier of the inventory item.  pValUnitId: Unique identifier of the valuation unit.  pAsOfDate: The point in time of the item cost. Supported format is <b>yyyy-mm-dd hh:mm:ss</b> .	SOAP Services.  CST_COST_ORGS_V.COST_ORG_ID  CST_COST_BOOKS_B.COST_BOOK_ID  EGP_SYSTEM_ITEMS_V.INVENTORY_ITEM_ID  CST_VAL_UNITS_B.VAL_UNIT_ID	Mandatory parameters for deep link: <ul style="list-style-type: none"> <li>pInventoryItemId</li> <li>pValUnitId</li> </ul> Optional parameters: <ul style="list-style-type: none"> <li>pCostOrgId: If not passed, then this is derived internally using pValUnitId.</li> <li>pCostBookId/ pCostBook: If none among these two are passed, then pCostBookId is derived internally using pValUnitId.</li> <li>pAsOfDate: If not passed, then current date time or if you have enabled LE time zone, current legal entity date time will be used.</li> </ul>
Costing	Review Cost Accounting Distributions (COST_ACCOUNTING_DISTRIBUTIONS, VIEW)	Opens a specific cost accounting distributions on the Review Cost Accounting Distributions page.	pTransactionId: Unique identifier of the transaction in costing.	Transaction Identification column on Review Cost Accounting Distributions Page.	You should pass either pTransactionId or pDistributionId or pEventId or pSourceTransactionId.



Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			<p>pDistributionId: Unique identifier of the cost distribution header.</p> <p>pEventId: Unique identifier of the SLA event generated for a distribution.</p> <p>pSourceTransactionId: Unique identifier of the transaction in source system (inventory transactions only).</p> <p>pTxnSourceType: Source transaction type (inventory transactions only).</p>	<p>CST_ALL_COST_TRANSACTIONS_V.TRANSACTION_ID</p> <p>CST_COST_DISTRIBUTIONS.DISTRIBUTION_ID                      CST_COST_DISTRIBUTIONS.EVENT_ID</p> <p>INV_MATERIAL_TXNS.TRANSACTION_ID                      (pSourceTransactionId)</p>	<p>pTxnSourceType (inventory) is optional to pass when pSourceTransactionId is passed. Order of precedence if multiple parameters are passed is pTransactionId or pDistributionId or pEventId or pSourceTransactionId.</p>
Costing	Receipt Accounting Distributions (RECEIPT_ACCTG_DISTRIBUTIONS,VIEW)	Opens a specific receipt accounting distribution on the Review Receipt Accounting Distributions page.	<p>pAccountingEventId: Unique identifier for the accounting event</p> <p>pEventId: Unique identifier for the CMR event</p>	<p>CMR_RCV_EVENTS.ACCOUNTING_EVENT_ID</p> <p>CMR_RCV_EVENTS.EVENT_ID</p>	<p>You should pass any one of the two parameters. If both the parameters are passed, the deep link will be displayed using pAccountingEventId.</p>
Inventory	Review Completed Transactions	Opens a specific transaction on the Review Completed transactions page.	<p>OrganizationCode: Unique identifier for the inventory organization</p> <p>ItemNumber: Unique identifier for the item name</p> <p>TransactionID: Unique identifier for the inventory completed transaction</p>	<p>Organization column on the search results of review completed transactions page.</p> <p>Item Number column on the search results of review completed transactions page.</p> <p>Transaction ID column in the search results.</p>	<p>When OrganizationCode and ItemNumber are passed, all the completed transactions are fetched for the combination of organization and item parameter value and using the transaction date as the current date. The results are displayed in the search results table.</p> <p>When TransactionId is passed, the Transaction Details page is displayed to show all the attributes for this transaction.</p>
Inventory	Manage Pending Transactions	Opens a specific transaction on the Manage Pending Transactions page.	<p>OrganizationCode: Unique identifier for the inventory organization</p>	<p>Organization column on the View Pending Transactions page.</p> <p>Transaction ID column in the search results.</p>	<p>When OrganizationCode is passed, all pending transactions with the processing status as Error for that</p>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			TransactionID: Unique identifier for the inventory completed transaction		organization are fetched. The results are displayed in the search results table.  When TransactionId is passed, the Transaction Details page is displayed to show all the attributes for this transaction.
Inventory	SSP Manage Receipts	Opens a specific receipt on the Self Service Manage Receipts page.	ReceiptNumber: Unique identifier for the receipt	Receipt column on the search results of the self service Manage Receipts page.	None
Inventory	View Receipts	Opens a specific receipt on the View Receipts page.	ReceiptNumber: Unique identifier for the receipt  ShipmentHeaderId: Unique identifier for the shipment	Receipt column on the search results on the Manage All Lines page.  ShipmentHeaderId attribute on the output response of receivingTransactionsH REST. Also, the attribute Receipt Header ID on Receiving - Receipts Real Time OTBI report.	None
Inventory	Manage Lots	Opens a specific lot on the Manage Lots page	LotNumber: Uniquely identifier for the lot  OrganizationCode: Unique identifier for the inventory organization  OrganizationID: Unique identifier for the organization  ItemNumber: Unique identifier for the item name  InventoryItemId: Unique identifier for the inventory item	Object Keys can be found using the Inventory Item Lots REST.	LotNumber must be provided.
Inventory	Manage Serial Numbers	Opens a specific serial number on the Manage Serial Numbers page.	SerialNumber: Unique identifier for the inventory item  OrganizationCode: Unique identifier	Object keys can be found using the Inventory Item Serial Numbers REST.	SerialNumber must be provided.

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			for the inventory organization  OrganizationID: Unique identifier for the organization  InventoryItemId: Unique identifier for the inventory item		
Inventory	Create ASN	Queries purchase order schedules eligible for creating ASN on the Create ASN page.	PurchaseOrder: Unique identifier for the purchase order, which is a commercial document that you can use to send a request to a seller to supply a product or a service in return for payment.  POHeaderId: Unique identifier for the purchase order header.  OrganizationCode: Unique identifier for the inventory organization  OrganizationID: Unique identifier for the organization	Purchase Order column on the search results table of the Create ASN page.  Other object keys can be found using the Purchase Orders for Receiving REST resource.	This deep link will work only for warehouse receiving users and will not work for supplier portal users.
Inventory	Manage Movement Requests	Opens a specific movement request on the Manage Movement Request page.	MovementRequestNum: Unique identifier for the movement request.  MovementRequestHeader: Unique identifier for the movement request header.  OrganizationCode: Unique identifier for the inventory organization  OrganizationID: Unique identifier for the organization	MovementRequestNum: is the value in the Movement Request field of the search results on the page Manage Movement Requests.  Other fields can be seen using the Inventory Movement Requests REST resource.	None
Inventory	Create ASBMN	Queries purchase order schedules eligible for creating ASBN using	PurchaseOrder: Unique identifier for the purchase order, which is a commercial	Purchase Order column on the search results table of the Create ASBN page.	This deep link will work only for warehouse receiving users and will not work

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
		organization code and purchase order on the Create ASBN page.	document that you can use to send a request to a seller to supply a product or a service in return for payment.  POHeaderId: Unique identifier for the purchase order header.  OrganizationCode: Unique identifier for the inventory organization  OrganizationID: Unique identifier for the organization	Other object keys can be found using Purchase Orders for Receiving REST resource.	for supplier portal users.
Inventory	Manage Inbound Shipments - Shipment	Opens a specific inbound shipment using the shipment and organization code on the Manage Inbound Shipments page.	OrganizationCode: Unique identifier for the inventory organization  OrganizationID: Unique identifier for the organization	Shipment column on the search results table of the Manage Inbound Shipments page.  Other object keys can be seen from Inbound Shipments REST resource.	Brazil related organizations are not supported for this deep link.
Inventory	Manage Inbound Shipments - Purchase Order	Opens a specific inbound shipment using the purchase order and organization code on the Manage Inbound Shipments page.	PurchaseOrder: Unique identifier for the purchase order, which is a commercial document that you can use to send a request to a seller to supply a product or a service in return for payment.  OrganizationCode: Unique identifier for the inventory organization  OrganizationID: Unique identifier for the organization	Purchase Order list of values on the Manage Inbound Shipments page or from the search results column of the Edit Shipment page.  Other object keys can be seen from Inbound Shipments REST resource.	Brazil related organizations are not supported for this deep link.
Inventory	Receive Expected Shipments - Purchase Order	Queries expected shipment lines that can be received using Purchase Order and its related header ID on the Receive Expected Shipments page.	PurchaseOrder: Unique identifier for the purchase order, which is a commercial document that you can use to send a request to a seller to	Document number corresponding to the document type as purchase order in the search results of the Receive Expected Shipments page.	With All organization context, the deep link will display data for organizations related to Brazil but you will not be able to receive the

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			<p>supply a product or a service in return for payment.</p> <p>POHeaderId: Unique identifier for the purchase order header.</p>	<p>Document number corresponding to the document type as purchase order in the search results of the Receive Expected Shipments page.</p>	<p>lines. The purchase order number will not be copied on the Purchase Order field on the Receive Expected Shipments page in the search panel.</p>
Inventory	Receive Expected Shipments - ASN	<p>Queries expected shipment lines that can be received using ASN and its related header ID on the Receive Expected Shipments page.</p>	<p>ASN: Unique identifies for the advanced shipment notice for the shipment from the supplier.</p> <p>ASNHeaderId: Unique identifier for the shipment header.</p>	<p>ASN column in the search results of the page Receive Expected Shipments.</p> <p>Other object keys can be seen in the response payload for REST resource asnsForReceiving.</p>	<p>With All organization context, the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The ASN will not be copied to the ASN field on the Receive Expected Shipments page in the search panel.</p>
Inventory	Receive Expected Shipments - Transfer Order	<p>Queries expected shipment lines that can be received using Transfer Order and its related header ID on the Receive Expected Shipments page.</p>	<p>TransferOrder: Unique identifier for the transfer order.</p> <p>TransferOrderHeaderId: Unique identifier for the transfer order header. Each transfer order can request to move items from one location to another location.</p>	<p>Document number corresponding to the document type as transfer order in the search results of the page Receive Expected Shipments.</p> <p>Other object keys can be seen in the response payload for REST resource transferOrdersForRecei</p>	<p>With All organization context, the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The transfer order will not be copied to the Transfer Order field on the Receive Expected Shipments page in the search panel.</p>
Inventory	Receive Expected Shipments - In transit Shipment	<p>Queries expected shipment lines that can be received using an in transit shipment and its related header ID on the Receive Expected Shipments page.</p>	<p>InTransitShipment: Unique identifier for the shipment of the item that is in transit.</p> <p>ShipmentHeaderId: Unique identifier for the shipment header.</p>	<p>Document Number corresponding to the document type as an In-transit shipment in the search results of the Receive Expected Shipments.</p> <p>Other object keys can be seen in the response payload for REST resource inTransitShipments.</p>	<p>With All organization context the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The in-transit shipment will not be copied to the In-transit Shipment field on the Receive Expected Shipments page in the search panel.</p>
Inventory	Receive Expected Shipments - RMA	<p>Queries expected shipment lines that can be received using RMA and its related header ID on the Receive Expected Shipments page.</p>	<p>RMANumber: Unique identifier for the return material authorization.</p> <p>RMAHeaderId: Unique identifier for the return material authorization</p>	<p>Document number corresponding to the document type as a Return material authorizations order in the search results of</p>	<p>With All organization context the deep link will display data for organizations related to Brazil but you will not be able to receive the lines. The RMA</p>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			that it received from the customer.	the Receive Expected Shipments page.  Other object keys can be seen in the response payload for REST resource rmasForReceiving.	number will not be copied to the RMA field on the Receive Expected Shipments page in the search panel.
Inventory	Manage Transfer Order	Opens a specific transfer order on the Manage Transfer Orders page.	TransferOrder: Unique identifier for the transfer order.  TransferOrderHeaderId: Unique identifier for the transfer order header. Each transfer order can request to move items from one location to another location.	Transfer Order column on the search results table of the Manage Transfer Orders page.  Other object keys can be found using the Inventory Transfer Orders REST resource.	You must have access to either the source organization or the destination organization to be able to view the transfer order.
Inventory	Manage Shipment Lines	Opens a specific outbound shipment line on the Manage Shipment Lines page.	Order: Order number from the order capture application.	Order column on the search results table of the Manage Shipment Lines page.	If an order has multiple lines then the Manage Shipment Lines page will open. If order has only one line then Edit Shipment Line page will open. You must have access to the ship-from organization to be able to see the data.
Inventory	Edit Shipment	Opens a specific outbound shipment on the Edit Shipment page.	Shipment: Name of the material shipment.  DeliveryId: Unique identifier for the shipment.	Shipment field on the Edit Shipment page.  Other object keys can be seen using the output response of the Shipments REST resource.	Using the deep link You will land on the Edit Shipment page. For an invalid shipment value you will land on the Manage Shipments page.
Logistics	Receive Items (SSP_RCV_PO,NONE)	Navigate to the Receive Items page.	poNumber : Purchase Order Number  poHeaderId: Unique identifier for the purchase order header	REST  OTBI Subject Areas (for receiving and procurement)	None
Maintenance	Enterprise Asset (ORA_MNT_ASSET, EDIT)	Opens a specific Enterprise Asset on the Edit Asset Details page.  If you only have the View Asset privilege,	assetNumber: Unique number for an installed base asset	<ul style="list-style-type: none"> <li>REST &lt;AssetNumber&gt;</li> <li>OTBI</li> <li>cse_assets_b table</li> </ul>	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
		then you will be presented the Edit Asset Details page in View mode.		Work Order dimension in the following subject areas: <ul style="list-style-type: none"> <li>Maintenance Management - Asset Real Time</li> <li>Maintenance Management - Forecast Real Time</li> <li>Installed Base - Meter Based Asset Usage Real Time</li> <li>Maintenance Management - Work Requirement Real TimeOpens a specific Enterprise Asset on the Edit Asset Details page.</li> </ul>	
Maintenance	Customer Asset (ORA_CSE_ASSET,EDIT)	Opens a specific Customer Asset on the Edit Asset Details page.  If you only have the View Asset privilege, then you will be presented the Edit Asset Details page in View mode.	assetNumber: Unique number for an installed base asset	<ul style="list-style-type: none"> <li>REST &lt;AssetNumber&gt;</li> <li>OTBI</li> <li>cse_assets_b table</li> </ul> Work Order dimension in the following subject areas: <ul style="list-style-type: none"> <li>Installed Base - Customer Asset Real Time</li> <li>Installed Base - Customer Asset Structure Real Time</li> <li>Installed Base - Meter Based Asset Usage Real Time</li> </ul>	None
Maintenance	Work Order (ORA_MNT_WORK_ORDER)	Opens the Manage Maintenance Work Orders page.	None	None	None
Maintenance	Work Order (ORA_MNT_WORK_ORDER, EDIT)	Opens a specific work order on the Edit Work Order page.	workOrderId: Unique identifier of a maintenance work order.	<ul style="list-style-type: none"> <li>REST &lt;WorkOrderNumb</li> <li>OTBI</li> </ul>	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
				<ul style="list-style-type: none"> <li>wie_work_orders_b table</li> </ul> Work Order dimension in the following subject areas: <ul style="list-style-type: none"> <li>Maintenance Management - Work Order Performance Real Time</li> <li>Maintenance Management - Material Usage Real Time</li> <li>Maintenance Management - Resource Usage Real Time</li> <li>Maintenance Management - Purchased Item Usage Real Time</li> </ul>	
Maintenance	Work Order (ORA_MNT_WORK_ORDER, VIEW)	Opens a specific work order on the View Work Order page.	workOrderId: Unique identifier of a maintenance work order.	<ul style="list-style-type: none"> <li>REST &lt;WorkOrderNumber&gt;</li> <li>OTBI</li> <li>wie_work_orders_b table</li> </ul> Work Order dimension in the following subject areas: <ul style="list-style-type: none"> <li>Maintenance Management - Work Order Performance Real Time</li> <li>Maintenance Management - Work Order Performance Real Time</li> <li>Maintenance Management - Resource Usage Real Time</li> <li>Maintenance Management - Purchased Item Usage Real Time</li> </ul>	None
Maintenance	Installed Base Asset (ORA_MNT_ASSET)	Opens the Manage Assets page.	None	None	None



Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Manufacturing	Work Order (WIE_WORK_ORDER,EDIT)  Work Order (WIE_WORK_ORDER, VIEW)	Opens a specific work order on either the Edit Work Order or View Work page based on the context.	workOrderId: Unique identifier for a manufacturing work order.  organizationCode: Abbreviation that identifies the manufacturing plant.  workOrderNumber: Functional value that uniquely identifies a manufacturing work order number within a plant.	The ObjKey parameters can be obtained from either REST APIs, OTBI analysis or WIE_WORK_ORDERS_B table.  In OTBI, ObjKey parameters can be obtained from Work Order dimension in all manufacturing subject areas.	If both ID value and functional keys are sent, the ID value is considered for deep linking.  When navigating using functional ObjKeys, both organization code and work order number are required.
Manufacturing	Exception (WIE_PRODUCTION_EXCEPTION,EDIT)	Opens a specific exception in either edit or view mode on the Report Production Exceptions page.	exceptionId: Unique identifier of a production exception.  exceptionNumber: Functional value that uniquely identifies a production exception.	The ObjKey parameters can be obtained from either REST APIs, OTBI analysis or ENQ_ISSUES_B table.  In OTBI, ObjKey parameters can be obtained from Exception Details dimension of Production Exceptions Real Time subject area.	If both ID value and functional keys are sent, the ID value is considered for deep linking.  The Report Production exceptions page is automatically rendered in either view or edit mode depending on the privileges and exception status.
Manufacturing	Work Definition (WIS_WORK_DEFINITION, EDIT)	Opens a specific work definition in either edit or view mode on the Work Definition page.	WorkDefinitionId: Unique identifier of a manufacturing work definition  . VersionNumber: Unique version number of the work definition.  organizationCode: Abbreviation that identifies the manufacturing plant.  WorkDefinitionCode: Abbreviation that identifies the work definition.  ItemNumber: Functional value that uniquely identifies the product item of the work definition.	The ObjKey parameters can be obtained from either REST APIs, OTBI analysis or WIS_WORK_DEFINITIONS, WIS_WD_VERSIONS tables.  In OTBI, ObjKey parameters can be obtained from Work Definition dimension in all manufacturing subject areas.	The Edit Work Definitions page is automatically rendered in either view or edit mode depending on the privileges, status and whether an active version is called..  You can navigate to work definition page using the following combinations of ObjKeys: <ul style="list-style-type: none"> <li>• WorkDefinitionId and VersionNumber</li> <li>• OrganizationCode and ProcessName and VersionNumber</li> </ul>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			<p>ProcessName: Functional value that uniquely identifies the process name of a process manufacturing work definition.</p>		<ul style="list-style-type: none"> <li>OrganizationCode and WorkDefinitionCode and ItemNumber and VersionNumber</li> </ul> <p>If both ID values and functional keys are sent, the ID values are considered for deep linking.</p> <p>If both work definition code and process name are sent, the process name is considered.</p>
Manufacturing	Edit Resource (WIS_RESOURCE,EDIT)	Opens a specific resource in either edit or view mode on the Edit Resources page.	<p>ResourceId: Unique identifier for a production resource.</p> <p>OrganizationCode: Abbreviation that identifies the manufacturing plant.</p> <p>ResourceCode: Abbreviation that identifies the resource.</p>	<p>The ObjKey parameters can be obtained from either REST APIs, OTBI analysis or WIS_RESOURCECES_B tables.</p> <p>In OTBI, ObjKey parameters can be obtained from Work Definition dimension in applicable manufacturing subject areas.</p>	<p>The Edit Resources page is automatically rendered in either view or edit mode depending on the privileges.</p> <p>If both ID values and functional keys are sent, the ID values are considered for deep linking.</p>
Order Management	View Order (SALES_ORDER, VIEW)	Opens the View Order page from the Order Management work area in the context of a specified sales order.	<p>HeaderId: Value that uniquely identifies the sales order header.</p> <p>OrderNumber: Number that identifies the sales order.</p> <p>SourceOrderSystem: Value that references the upstream order capture system that contains the source order.</p> <p>SourceTransactionNum Number that identifies the transaction in the source system.</p> <p>SourceTransactionId: Uniquely identifies the transaction in the source system.</p>	REST	<p>OrderNumber, SourceTransactionNumber and SourceTransactionId ObjKey will navigate you to the running order by default. If there isn't a running order, you will be navigated to the draft order.</p> <p>For cases when OrderNumber is not unique, SourceOrderSystem will be passed to identify the order.</p> <p>SourceOrderSystem ObjKey is mandatory when identifying an order using SourceTransactionNumber or SourceTransactionId</p>

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
			<p>ChangeVersionNumber: Version number of the sales order.</p> <p>DraftOrderFlag: Sales Order is in Draft status.</p>		<p>ChangeVersionNumber: The ObjKey can be passed to navigate to a specific version of an order. Custom UIs can use this to navigate to a reference version.</p>
Order Management	Fulfillment View (SALES_ORDER, FULFILLMENT_VIEW)	Opens the Fulfillment View Page from the Order Management work area, in the context of a specified sales order.	<p>HeaderId: Value that uniquely identifies the sales order header.</p> <p>OrderNumber: Number that identifies the sales order.</p> <p>SourceOrderSystem: Value that references the upstream order capture system that contains the source order.</p> <p>SourceTransactionNumber: Number that identifies the transaction in the source system.</p> <p>SourceTransactionId: Uniquely identifies the transaction in the source system.</p>	REST	<p>OrderNumber, SourceTransactionNumber and SourceTransactionId ObjKey will navigate you to the running order by default. If there isn't a running order, you will be navigated to the draft order.</p> <p>For cases when OrderNumber is not unique, SourceOrderSystem will be passed to identify the order.</p> <p>SourceOrderSystem ObjKey is mandatory when identifying an order using SourceTransactionNumber or SourceTransactionId</p>
Order Management	Order Management Dashboard (SALES_ORDER, NONE)	Opens the Order Management dashboard.	Not needed	N/A	None
Order Management	Create order (SALES_ORDER, CREATE)	Opens the Create Order Page from the Order Management work area.	Not needed	N/A	None
Product Lifecycle Management	Portfolio (PORTFOLIOS,EDIT)	Opens a specific portfolio on the Portfolio page.	PortfolioId: Unique identifier of the portfolio.	Visible in OTBI Subject Areas.	None
Product Lifecycle Management	Concept (CONCEPTS, EDIT)	Opens a specific concept on the Concepts page.	conceptId: Unique identifier of the concept.	REST OTBI Subject Area Innovation Management- Concepts Real Time	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Product Lifecycle Management	Proposal (PROPOSALS,EDIT)	Opens a specific proposal on the Proposals page.	productProposalId: Unique identifier of the proposal.	REST  OTBI Subject Area Innovation Management- Proposals Real Time  Innovation Management- Proposals Cash flow Real Time	None
Product Lifecycle Management	Idea (IDEAS,EDIT)	Opens a specific idea on the Idea page.	IdeaId: Unique identifier of the idea.	REST  OTBI Subject Area Innovation Management- Ideas Real Time	None
Product Lifecycle Management	Requirements Specification (REQUIREMENTS, EDIT)	Opens a specific requirements specification on the Requirement page.	requirementId: Unique identifier for the requirement.	REST  OTBI Subject Area Innovation Management- Requirements Real Time	None
Product Lifecycle Management	Changes (CHANGES, EDIT)	Opens a specific change order on the Product Change Order page.	changeObjectId: Unique identifier for the change order.	REST  OTBI Subject Area Product Management- Change Orders Real Time  Product Management- Change Order Approvals Real Time	None
Product Lifecycle Management	Items (ITEMS,EDIT)	Opens a specific Engineering item on the Items page.	itemId: Unique identifier for the item.  orgId: Unique identifier for the organization.	REST  OTBI Subject Area Product Management- Structures and Components Real Time  Product Management- Source Systems Real Time  Product Management- Items and Revisions Real Time	None
Product Lifecycle Management	Manufacturer Part (MPN,EDIT)	Opens a specific manufacturer part on	tpltemId: Unique identifier for the part.	REST	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
		the Manufacturer part page.		OTBI Subject Area Product Management-Trading Partner Items Real Time	
Product Lifecycle Management	Manufacturer (MFRS, EDIT)	Opens a specific manufacturer on the Manufacturer page.	partyId: Unique identifier for the party.	REST  OTBI Subject Area Product Management-Trading Partner Items Real Time	None
Product Lifecycle Management	New Item Request (NIRS,EDIT)	Opens a specific new item request on the New Item Request page.	changeId: Unique identifier for the new item request.	REST  OTBI Subject Area Product Management-New Item Requests Real Time  Product Management-New Item Requests Approvals Real Time	None
Product Management	Item (PIM_ITEM,EDIT)	Opens a specific item on the Item Details page.	pItemid: Unique identifier of an item.  pItemNumber, Value that identifies a part, item, product, or service.  pOrgId, Unique identifier of an organization.  pOrgCode, Code that identifies an organization.	Items V2 REST API: ItemId, ItemNumber, OrganizationId and OrganizationCode.	You can give either ItemId or ItemNumber and either OrgCode or OrgId.
Product Management	Manage Items (PIM_ITEM,NONE)	Opens the Manage Items search page.	Not Needed	N/A	None
Quality Inspection Management	View Inspection Results (INSPECTION_EVENTS,VIEW)	Opens a specific event on the Inspection Results page.	inspectionEventId: Unique identifier of the inspection results.	inspectionEventId column in table qa_ip_events.	None
Quality Inspection Management	View Inspection Plan (INSPECTION_PLANS,VIEW)	Opens a specific inspection plan on the Inspection plans page.	InspectionPlanId: Unique identifier of the inspection plan.	inspectionEventId column in table qa_ip_events.	None
Supplier Claims	Manage Supplier Claims (SUPPLIER_CLAIM,NONE)	Opens the Manage Claims page.	Not Needed	N/A	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
Supplier Claims	Supplier Claim (SUPPLIER_CLAIM, EDIT)	Opens a specific supplier claim on the Claim details page.	ClaimId or ClaimNumber ClaimId: Unique identifier of the channel claim.  ClaimNumber: Unique identifier of the channel claim that can be viewed in the UI.	ClaimId and ClaimNumber are available from Channel Claims REST  ClaimNumber is available in the Manage Claims UI and Claim detail UI in Supplier Channel Management.  Query CLAIM_ID, CLAIM_NUMBER columns from CJM_CLAIMS_ALL table	None
Supply Chain Collaboration	Manage Supply Collaboration Network (COLLABORATION_RELATIONSHIP,EDIT)	Opens a specific collaboration relationship on the Manage Supply Collaboration Network page.	RelationshipNumber: Unique identifier of the collaboration relationship.	Relationship ID column in Manage Supply Collaboration Network Page of Supply Chain Collaboration Work area.	None
Supply Chain Planning	Manage Sourcing Rules (SOURCING_RULES,NONE)	Navigate to the Manage Sourcing Rules page.	Not needed	N/A	None
Supply Chain Planning	Edit Sourcing Rule (SOURCING_RULES, EDIT)	Opens a specific sourcing rule on the Manage Sourcing Rules page.	SourcingRuleId: Unique identifier of the sourcing rule.	REST  OTBI Subject Area	None
Supply Chain Planning	Manage Assignment Sets (SOURCING_ASSIGNMENTS,NONE)	Navigate to Manage Assignment Sets page.	Not needed	N/A	None
Supply Chain Planning	Edit Assignment Set (SOURCING_ASSIGNMENTS,EDIT)	Opens a specific assignment set on the Manage Assignment Sets page.	AssignmentSetId: Unique identifier of the assignment sets.	REST  OTBI Subject Area	None
Supply Chain Planning	Manage ATP Rules (ATP_RULES,NONE)	Navigate to Manage ATP Rules page.	Not needed	N/A	None
Supply Chain Planning	Edit ATP Rule (ATP_RULES,EDIT)	Opens a specific ATP rule on the Manage ATP Rules page.	AtpRuleId: Unique identifier of the ATP rule.	REST  OTBI Subject Area	None
Supply Chain Planning	Manage Planning Allocation Rules (ATP_	Navigate to Manage Planning Allocation Rules page.	Not needed	N/A	None

Product	Deep Link (Object Type, Action)	Description	Object Key Parameter Names	Object Key Locations	Rules, if any
	ALLOCATION_RULES, NONE)				
Supply Chain Planning	Edit Allocation Rule (ATP_ALLOCATION_RULES,EDIT)	Opens a specific allocation rule on the Manage Planning Allocation Rules page.	AtpAllocationId: Unique identifier of allocation rule.	REST OTBI Subject Area	None

## Configure Deep Links in Oracle Fusion Cloud Product Lifecycle Management

For modules that come under Oracle Fusion Cloud Product Lifecycle Management, the URLs that are supplied for deep links in the Create New Action dialog box of Oracle Transactional Business Intelligence use the following format: Base URL + Generic Part

The URLs contain these elements:

- An application-specific base URL, such as <https://demo.oracleserver.com/>.
- A generic part, which is the same for all links: [fscmUI/faces/deeplink?](#)
- Object-specific arguments, which are provided in the **objType&action&objKey** format.

An example of a complete, case-sensitive URL is as follows: [https://demo.oracleserver.com/fscmUI/faces/deeplink?objType=CHANGES&action=EDIT&objKey=changeObjectId=<CHANGE\\_ID>](https://demo.oracleserver.com/fscmUI/faces/deeplink?objType=CHANGES&action=EDIT&objKey=changeObjectId=<CHANGE_ID>)

The following table lists the objects that are supported for deep links in the Innovation to Commercialization lifecycle process of Oracle Cloud Product Lifecycle Management. For each object, the corresponding arguments are provided.

Object	Object-Specific Argument
Change	objType=CHANGES&action=EDIT&objKey= <b>changeObjectId</b> =<CHANGE_ID>
Concept	objType=CONCEPTS&action=EDIT&objKey= <b>conceptId</b> =<CONCEPT_ID>
Idea	objType=IDEAS&action=EDIT&objKey= <b>ideaId</b> =<IDEA_ID>
Item (opens in Oracle Product Development)	objType=ITEMS&action=EDIT&objKey=itemId%3D<INVENTORY_ITEM_ID>%3BorgId%3D<ORGANIZATION_ID>  <b>Note:</b> The object-specific argument should be manually entered as provided in the <b>URL</b> field after the parameters are defined. A placeholder should be used in place of the INVENTORY_ITEM_ID parameter value in the format required by Oracle Transactional Business Intelligence. The orgId parameter must be explicitly set to the ID of your organization.

Object	Object-Specific Argument
Manufacturer	<code>objType=MFRS&amp;action=EDIT&amp;objKey=<b>partyId</b>=&lt;TRADING_PARTNER_ID&gt;</code>  <b>Note:</b> The link works for only those manufacturers that are created in Product Development.
Manufacturer Part	<code>objType=MPN&amp;action=EDIT&amp;objKey=<b>tpltemId</b>=&lt;TP_ITEM_ID&gt;</code>  <b>Note:</b> The link works for only those manufacturer parts that are created in Product Development.
New Item Request	<code>objType=NIRS&amp;action=EDIT&amp;objKey=changeId%3D&lt;NEWITEMREQUEST_ID&gt;%3Bmode%3DviewOrEdit</code>  <b>Note:</b> The object-specific argument should be manually entered as provided in the <b>URL</b> field after the parameters are defined. A placeholder should be used in place of the NEWITEMREQUEST_ID parameter value in the format required by Oracle Transactional Business Intelligence.
Portfolio	<code>objType=PORTFOLIOS&amp;action=EDIT&amp;objKey=<b>bvForPortfolioId</b>=&lt;PORTFOLIO_ID&gt;</code>
Proposal	<code>objType=PROPOSALS&amp;action=EDIT&amp;objKey=<b>productProposalId</b>=&lt;PROPOSAL_ID&gt;</code>
Quality Action	<code>objType=ACTIONS&amp;action=EDIT&amp;objKey=<b>actionId</b>=&lt;ACTION_ID&gt;</code>
Quality Issue	<code>objType=ISSUES&amp;action=EDIT&amp;objKey=<b>issueId</b>=&lt;ISSUE_ID&gt;</code>
Requirement Specification	<code>objType=REQUIREMENTS&amp;action=EDIT&amp;objKey=<b>requirementId</b>=&lt;REQUIREMENT_ID&gt;</code>

In the preceding table, the parts of the object-specific arguments that are in boldface must be manually inserted into the links in the **URL** field of the **Create New Action** dialog box after the parameters are defined. The angle brackets and the enclosed text are placeholders for the ID columns that must be manually specified in the **Define Parameters** group of the dialog box. The resulting link in the **URL** field, including the placeholders that are dynamically inserted for parameter values by Oracle Transactional Business Intelligence, should be similar to the following: **https://demo.oracleserver.com/fscmUI/faces/deeplink?objType=@{1}&action=@{2}&objKey=changeObjectId=@{3}**

**Note:** Ensure that the values in the ID columns in your analyses don't have decimal values or commas. Deep links that use ID columns with decimal values or commas don't work for Oracle Cloud Product Lifecycle Management.

*Related Topics*

- [Create Deep Links](#)



## FAQs for Deep Links

### Why did a deep link open to a blank page?

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

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

### Do I have to display the ID for my object?

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

### Can I display actions for some users and not others?

Yes, you define conditions for the action to display.

## Manage Permissions

### Manage Catalog Permission

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

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

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

## Hide Predefined Catalog Folders

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

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

## BI Reporting Roles

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

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
/Shared/Common Content	BI_COMMON_CONTENT_REPORTING_DUTY	Common Content Folder Reporting Duty	None
/Shared/Customer Data Management	BI_CDM_REPORTING_DUTY	Customer Data Management Folder Reporting Duty	None
/Shared/Enterprise Contracts	BI_OKC_REPORTING_DUTY	Enterprise Contracts Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_SUPPLIER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_SUPPLIER_CONTRACT_MANAGER_JOB, ORA_OKC_SUPPLIER_CONTRACT_TEAM_MEMBER_ABSTRACT
/Shared/Extension	BI_EXT_REPORTING_DUTY	Extension Folder Reporting Duty	None
/Shared/Financials	BI_FIN_REPORTING_DUTY	Financials Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_INVOICE_SUPERVISOR_JOB ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			PAYMENT_SUPERVISOR_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_MANAGER_SOD_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_JOB, ORA_AR_ACCOUNTS_RECEIVABLE_SPECIALIST_SOD_JOB, ORA_AR_BILLING_MANAGER_JOB, ORA_AR_BILLING_SPECIALIST_JOB, ORA_CE_CASH_MANAGER_JOB, ORA_EXM_EXPENSE_MANAGER_JOB, ORA_FA_ASSET_ACCOUNTANT_JOB, ORA_FA_ASSET_ACCOUNTING_MANAGER_JOB, ORA_FUN_INTERCOMPANY_ACCOUNTANT_JOB, ORA_GL_FINANCIAL_ANALYST_JOB, ORA_VRM_REVENUE_ANALYST_JOB, ORA_VRM_REVENUE_MANAGER_JOB, ORA_XCC_BUDGET_MANAGER_JOB
<b>/Shared/Higher Education</b>	BI_HED_REPORTING_DUTY	Higher Education Folder Reporting Duty	ORA_HEQ_ADMISSIONS_COORDINATOR_JOB, ORA_HEQ_ADMISSIONS_MANAGER_JOB, ORA_HER_ACADEMIC_COORDINATOR_JOB, ORA_HER_REGISTRAR_JOB, ORA_HES_BURSAR_JOB, ORA_HEY_STUDENT_SERVICES_MANAGER_JOB, ORA_HEY_STUDENT_SUPPORT_ADVISOR_JOB
<b>/Shared/Human Capital Management</b>	BI_HCM_REPORTING_DUTY	Human Capital Management Folder Reporting Duty	By default, predefined HCM job roles have no access to the the predefined content.
<b>/Shared/Incentive Compensation</b>	BI_IC_REPORTING_DUTY	Incentive Compensation Folder Reporting Duty	ORA_CN_INCENTIVE_COMPENSATION_ANALYST_JOB, ORA_CN_INCENTIVE_COMPENSATION_MANAGER_JOB, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PARTICIPANT_MANAGER_ABSTRACT, ORA_CN_INCENTIVE_COMPENSATION_PLAN_ADMINISTRATOR_JOB
<b>/Shared/Loyalty</b>	BI_LOY_REPORTING_DUTY	Loyalty Folder Reporting Duty	ORA_LOY_LOYALTY_MARKETING_MANAGER_JOB, ORA_LOY_LOYALTY_PROGRAM_ADMINISTRATOR_JOB

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
<b>/Shared/Manufacturing</b>	BI_MFG_REPORTING_DUTY	Manufacturing Folder Reporting Duty	ORA_CSE_ASSET_ADMINISTRATOR_JOB
<b>/Shared/Marketing</b>	BI_MKT_REPORTING_DUTY	Marketing Folder Reporting Duty	ORA_MKL_SALES_LEAD_QUALIFIER_JOB, ORA_MKT_CORPORATE_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_ANALYST_JOB, ORA_MKT_MARKETING_MANAGER_JOB, ORA_MKT_MARKETING_OPERATIONS_MANAGER_JOB, ORA_MKT_MARKETING_VP_JOB
<b>/Shared/Partner</b>	BI_ZPM_REPORTING_DUTY	Partner Folder Reporting Duty	ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB
<b>/Shared/Procurement</b>	BI_PRC_REPORTING_DUTY	Procurement Folder Reporting Duty	ORA_AP_ACCOUNTS_PAYABLE_MANAGER_JOB, ORA_AP_ACCOUNTS_PAYABLE_SPECIALIST_JOB, ORA_AP_ACCOUNTS_PAYABLE_SUPERVISOR_JOB, ORA_PO_BUYER_JOB, ORA_PO_PROCUREMENT_APPLICATION_ADMIN_JOB, ORA_PO_PROCUREMENT_INTEGRATION_SPECIALIST_JOB, ORA_PO_PURCHASE_ANALYSIS_ABSTRACT, ORA_POQ_SUPPLIER_QUALIFICATION_DISCRETIONARY, ORA_POR_PROCUREMENT_REQUESTER_ABSTRACT, ORA_POZ_SUPPLIER_ADMINISTRATOR_ABSTRACT, ORA_POZ_SUPPLIER_MANAGER_ABSTRACT
<b>/Shared/Projects</b>	BI_PRJ_REPORTING_DUTY	Projects Folder Reporting Duty	ORA_OKC_CUSTOMER_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_CUSTOMER_CONTRACT_MANAGER_JOB, ORA_OKC_CUSTOMER_CONTRACT_TEAM_MEMBER_ABSTRACT, ORA_OKC_ENTERPRISE_CONTRACT_ADMINISTRATOR_JOB, ORA_OKC_ENTERPRISE_CONTRACT_MANAGER_JOB, ORA_OKC_ENTERPRISE_CONTRACT_TEAM_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			MEMBER_ABSTRACT, ORA_PJF_GRANTS_ACCOUNTANT_JOB, ORA_PJF_GRANTS_ADMINISTRATOR_JOB, ORA_PJF_GRANTS_DEPARTMENT_ADMINISTRATOR_JOB, ORA_PJF_PROJECT_ACCOUNTANT_JOB, ORA_PJF_PROJECT_ADMINISTRATOR_JOB, ORA_PJF_PROJECT_BILLING_SPECIALIST_JOB, ORA_PJF_PROJECT_EXECUTION_ABSTRACT, ORA_PJF_PROJECT_EXECUTIVE_JOB, ORA_PJF_PROJECT_INTEGRATION_SPECIALIST_JOB, ORA_PJF_PROJECT_MANAGEMENT_DUTY_ABSTRACT, ORA_PJF_PROJECT_MANAGER_JOB, ORA_PJF_PROJECT_TEAM_MEMBER_ABSTRACT, ORA_PJF_PROJECTS_APPLICATION_ADMINISTRATOR_JOB, ORA_PJF_RESOURCE_MANAGER_JOB, ORA_PJF_TEAM_COLLABORATOR_ABSTRACT
<b>/Shared/Public Sector</b>	BI_PSC_REPORTING_DUTY	Public Sector Folder Reporting Duty	ORA_PSC_AGENCY_STAFF_ABSTRACT, ORA_PSC_BUILDING_INSPECTOR_JOB, ORA_PSC_BUSINESS_ANALYST_JOB, ORA_PSC_CHIEF_BUILDING_OFFICER_JOB, ORA_PSC_ECONOMIC_DEV_OFFICER_JOB, ORA_PSC_FINANCE_ADMIN_JOB, ORA_PSC_INSPECTIONS_SUPERVISOR_JOB, ORA_PSC_PERMIT_TECHNICIAN_JOB, ORA_PSC_PERMITS_APPLICATION_ADMINISTRATOR_JOB, ORA_PSC_PERMITS_SUPERVISOR_JOB, ORA_PSC_PLAN_COORDINATOR_JOB, ORA_PSC_PLAN_REVIEWER_JOB, ORA_PSC_PRINCIPAL_PLANNER_JOB, ORA_PSC_SYSTEM_ADMINISTRATOR_JOB
<b>/Shared/Risk Management</b>	BI_GRC_REPORTING_DUTY	Risk Management Folder Reporting Duty	ORA_GTG_APPLICATION_ACCESS_AUDITOR_JOB, ORA_GTG_APPLICATION_CONTROL_MANAGER_JOB, ORA_GTG_COMPLIANCE_MANAGER_JOB, ORA_GTG_ENTERPRISE_RISK_AND_CONTROL_MANAGER_JOB, ORA_GTG_RISK_MANAGEMENT_AUDITOR_JOB, ORA_GTR_USER_ACCESS_CERTIFICATION_MANAGER_JOB
<b>/Shared/Sales</b>	BI_ZBS_REPORTING_DUTY	Sales Folder Reporting Duty	ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZBS_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			SALES_MANAGER_JOB, ORA_ZBS_SALES_REPRESENTATIVE_JOB, ORA_ZBS_SALES_RESTRICTED_USER_JOB, ORA_ZBS_SALES_VP_JOB, ORA_ZPM_CHANNEL_ACCOUNT_MANAGER_JOB, ORA_ZPM_CHANNEL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_OPERATIONS_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_MANAGER_JOB, ORA_ZPM_CHANNEL_PARTNER_PORTAL_ADMINISTRATOR_JOB, ORA_ZPM_CHANNEL_SALES_DIRECTOR_JOB, ORA_ZPM_CHANNEL_SALES_MANAGER_JOB, ORA_ZSP_SALES_ANALYST_JOB
<b>/Shared/Service</b>	BI_SVC_REPORTING_DUTY	Service Folder Reporting Duty	ORA_CSO_KNOWLEDGE_ANALYST_JOB, ORA_CSO_KNOWLEDGE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_MANAGER_JOB, ORA_SVC_CUSTOMER_SERVICE_REPRESENTATIVE_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_AGENT_JOB, ORA_SVC_HUMAN_RESOURCE_HELP_DESK_MANAGER_JOB, ORA_SVC_INTERNAL_HELP_DESK_ADMINISTRATOR_JOB, ORA_SVC_INTERNAL_HELP_DESK_AGENT_JOB, ORA_SVC_INTERNAL_HELP_DESK_MANAGER_JOB, ORA_ZBS_SALES_ADMINISTRATOR_JOB, ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB
<b>/Shared/Subscription Management</b>	BI_OSS_REPORTING_DUTY	Subscription Management Folder Reporting Duty	ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB
<b>/Shared/Supply Chain Management</b>	BI_SCM_REPORTING_DUTY	Supply Chain Management Folder Reporting Duty	ORA_ACD_PRODUCT_DESIGN_ENGINEER_JOB, ORA_ACD_PRODUCT_DESIGN_MANAGER_JOB, ORA_ACE_PRODUCT_MANAGEMENT_VP_JOB, ORA_ACE_PRODUCT_PORTFOLIO_MANAGER_JOB, ORA_CMF_FISCAL_DOCUMENT_SPECIALIST_JOB, ORA_CMF_RECEIVING_SPECIALIST_JOB, ORA_CMR_RECEIPT_ACCOUNTING_DISCRETIONARY, ORA_CSE_ASSET_ADMINISTRATOR_JOB, ORA_CST_COST_ACCOUNTANT_

Catalog Folder	Duty Role	Duty Role Name	Associated Job Roles
			JOB, ORA_DOO_ORDER_ADMINISTRATOR_JOB, ORA_DOO_ORDER_MANAGER_JOB, ORA_EGI_PRODUCT_DATA_STEWARD_JOB, ORA_EGP_PRODUCT_MANAGER_JOB, ORA_ENQ_QUALITY_ANALYST_JOB, ORA_ENQ_QUALITY_ENGINEER_JOB, ORA_FOS_SUPPLY_CHAIN_CONTROLLER_JOB, ORA_INV_INVENTORY_MANAGER_JOB, ORA_INV_WAREHOUSE_MANAGER_JOB, ORA_MNT_MAINTENANCE_MANAGER_JOB, ORA_MNT_MAINTENANCE_TECHNICIAN_JOB, ORA_MSC_BACKLOG_MANAGER_JOB, ORA_MSC_DEMAND_AND_SUPPLY_PLANNER_JOB, ORA_MSC_DEMAND_PLANNER_JOB, ORA_MSC_MATERIALS_PLANNER_JOB, ORA_MSC_REPLENISHMENT_PLANNER_JOB, ORA_MSC_SALES_AND_OPERATIONS_PLANNER_JOB, ORA_MSC_SUPPLY_CHAIN_PLANNER_JOB, ORA_RCL_FIELD_SERVICE_ADMINISTRATOR_JOB, ORA_VCS_SUPPLY_CHAIN_COLLABORATION_PLANNER_JOB, ORA_WSH_SHIPPING_MANAGER_JOB
<b>/Shared/Functional Setup</b>	BI_FSM_REPORTING_DUTY	Functional Setups Folder Reporting Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_ASM_APPLICATION_IMPLEMENTATION_CONSULTANT_JOB
<b>/Shared/Security</b>	FBI_SECURITY_TRANSACTION_ANALYSIS_DUTY	Security Transaction Analysis Duty *Not inherited by Custom BI Web cat Reporting Duty	ORA_FND_IT_SECURITY_MANAGER_JOB

## Predefined Catalog Lockdown

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

Here are a few things to know about catalog folders:

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

*Related Topics*

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

## Supply Chain Management Repository and Session Variables for Business Intelligence

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

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



Variable Name	Type	Usage	Offering
PREVIOUS_QUARTER	Repository Variable	Returns the value of Previous Quarter in the YYYY Q nn format.	All

These variables are available for Supply Chain Management only:

Variable Name	Type	Usage	Offering
CURRENT_MONTH_END_DATE_REP_OTBI	Repository Variable	Returns the current Gregorian month end date.	Supply Chain Management
CURRENT_MONTH_START_DATE_REP_OTBI	Repository Variable	Returns the current Gregorian month start date.	Supply Chain Management
CURRENT_WEEK_END_DATE_REP_OTBI	Repository Variable	Returns the current Gregorian week end date.	Supply Chain Management
CURRENT_WEEK_START_DATE_REP_OTBI	Repository Variable	Returns current Gregorian week start date.	Supply Chain Management
CURRENT_YEAR_END_DATE_REP_OTBI	Repository Variable	Returns the current Gregorian year end date.	Supply Chain Management
CURRENT_YEAR_START_DATE_REP_OTBI	Repository Variable	Returns the current Gregorian year start date.	Supply Chain Management
Last_Quarter_Days_OTBI	Repository Variable	Returns the number of days from the beginning of the last calendar quarter to the current date.	Supply Chain Management
This_Month_Days_OTBI	Repository Variable	Returns the number of days since the beginning of the current calendar month.	Supply Chain Management
This_Quarter_Days_OTBI	Repository Variable	Returns the number of days since the beginning of the current calendar quarter.	Supply Chain Management
ToUOM	Session Variable	Gets the user report-level reporting unit of measure (UOM), and passes it on to the UOM conversion calculation engine.	Supply Chain Management



# 3 Subject Areas

## SCM Subject Areas in Oracle Transactional Business Intelligence

Build real-time analytics with subject areas that hold the data related to your business transactions.

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

### Run Scheduled Process for Populating Subject Areas

You must run a scheduled process to define certain items for which you want reports and analyses for the subject areas like Product Management- Structures and Components Real Time and Product Management- Where Used Real Time. Based on the items you provide as input, a scheduled process automatically populates these subject areas.

Follow these steps to run a scheduled process for Product Management- Structures and Components Real Time:

1. In the Scheduled Process work area, search for Expand Structure for Business Intelligence and select it.
2. In the Parameters, enter the item numbers, separated by commas if there are multiple items.
3. Provide the unique master organization code for product development.
4. Submit the scheduled process and ensure it has run successfully.
5. Navigate to the Reports and Analytics work area and select Create Analysis.
6. Select the Product Management- Structures and Components Real Time subject area.

**Tip:** The folder Structure Quick Preview is a good place to start for your reports.

Follow these steps to run a scheduled process for Product Management-Where Used Real Time:

1. In the Scheduled Process work area, search for Item Where Used for Business Intelligence and select it.
2. In the Parameters, enter the item numbers, separated by commas if there are multiple items.
3. Provide the unique master organization code for product development.
4. Submit the scheduled process and ensure it has run successfully.
5. Navigate to the Reports and Analytics work area and select Create Analysis.
6. Select the Product Management- Where Used Real Time subject area.

**Tip:** The folder Where Used Quick Preview is a good place to start for your reports.

### Fact Folders and Dimension Folders

Each subject area has one fact folder and a number of dimension folders. Fact folders contain attributes that can be measured, meaning that they're numeric values like past due fulfillment lines and item numbers. A special folder, called a degenerate dimension, is also associated with the fact folder. Each dimension folder is joined to the fact folder within a subject area. Fact folders are usually named after the subject area.

### Related Topics

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

## How Subject Areas Work

Subject areas are the building blocks of your analytics. There are subject areas that come prebuilt with your application, and over 100 analytics built from the included subject areas. Let's look a little closer at how subject areas work.

All of the electronic activity that happens each day in your company is stored and can be used to look at current and historical data, as well as predict future trends and outcomes. This information is saved and grouped and packaged as objects. The objects hold information called attributes which are pieces of information related to that object. For example, an object called Customer would hold information related to that customer, such as name, address, phone number, company and so on.

Object attributes are organized in columns which are used to provide real-time transactional reporting.

You can use the prebuilt subject areas to build your own analytics. Or you can build your own subject areas and use them for building or editing analytics. Most importantly, the focus of a subject area is to provide a way for you to gain access to key insights about your organization.

# 4 Flexfields

## Overview of Flexfield Use in Analyses

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

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

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

### Flexfield Types

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

- Descriptive
- Extensible
- Key

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

## Configure Key Flexfields for Transactional Business Intelligence

### Enable Key Flexfields for Business Intelligence Reporting

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

To designate key flexfields as BI-enabled:

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

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

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

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

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

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

*Related Topics*

- [Considerations for Enabling Key Flexfield Segments for Business Intelligence](#)
- [Update Existing Setup Data](#)

## Overview of Supported Key Flexfields

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

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

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

## Map Non-Qualified Segments to BI Objects

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

To map non-qualified segments to BI objects:

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

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

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

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

## Set Up the GL Accounting Flexfields

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

- Understanding Accounting Key Flexfields

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

## Understanding Accounting Key Flexfields

The Accounting Key Flexfield is used to identify GL accounts.

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

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

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

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

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

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

```
FscmTopModelAM.AccountBIAM.FLEX_TREECODE_VS_segmentlabel_VI
```

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

```
FscmTopModelAM.AccountBIAM.FLEX_VS_XXX_VI
```

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

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

## Identifying Accounting Key Flexfield Segments

Identify and map segments of the chart of accounts.

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



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

## Assigning Unique Segment Labels

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

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

To assign unique segment labels to charts of accounts segments:

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

## Performing Column Flattening

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

To flatten columns for account hierarchies:

1. In the Setup and Maintenance work area, go to the **Manage Trees and Tree Versions** task and navigate to the Manage Trees and Tree Versions window.

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

## Designating GL Accounting Segment Instances as BI-Enabled

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

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

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

## Deploying Accounting Key Flexfields

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

Accounting key flexfields have one of the following deployment statuses:

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

To deploy accounting key flexfields:

1. In the Setup and Maintenance work area, go to the **Manage Chart of Accounts** task.

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

## Configure Descriptive Flexfields for Transactional Business Intelligence

### Overview of Transactional Business Intelligence Configuration of Descriptive Flexfields

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

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

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

#### *Related Topics*

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

## Configure Descriptive Flexfield Segments

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

### Configuring a Descriptive Flexfield Segment

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

To configure available descriptive flexfield segments:

1. In the Setup and Maintenance work area, go to the **Manage Descriptive Flexfields** task.

2. If the **BI Enabled** option is cleared, select it.
3. Select the options for deployment of the descriptive flexfields.

### Related Topics

## Set Descriptive Flexfields as BI-Enabled

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

### Setting a Flexfield as BI-Enabled

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

## Configure Extensible Flexfields for Transactional Business Intelligence

### Configure Extensible Flexfields

You can use extensible flexfields to configure more segments.

An extensible flexfield is similar to a descriptive flexfield in that it provides an expansion space that you can use to configure additional attributes (segments) without additional programming. As with descriptive flexfields, each segment is represented in the database as a single column. However, with extensible flexfields, the context values and context-sensitive segments are stored in an extension table.

### Categories and Contexts

You can combine and arrange the segments into attribute groups that are tailored to your specific needs. For example, you can group related segments so that they appear together on the page. The attribute groups are referred to as contexts. You can optionally set up an extensible flexfield to enable categorization of contexts.

You can add contexts and segments to extensible flexfields just like the descriptive flexfields. To see the extensible flexfields in analyses, you need to deploy them and then run the BI Extender Essbase scheduled process.

### Configure Extensible Flexfields

To configure extensible flexfields:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfield** task.
2. Search for the EFF you want to configure, then select it and click the **Edit** icon.
3. In the Edit Extensible Flexfield dialog, highlight the category Display Name, then select **Manage Contexts**.
4. In the Manage Context dialog, search for the context that contains the segment you want to configure, highlight it, then click the **Edit** icon.
5. In the Edit Context dialog, click the **Edit** icon.
6. Edit the segment, as required, then click **Save**.

*Related Topics*

- [Flexfield Usages](#)

## Set Extensible Flexfields as BI-Enabled

Extensible flexfields are BI enabled if at least one segment in a context is BI enabled.

### Setting Extensible Flexfields as BI-Enabled

To set extensible flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfields** task.
2. Enter the extensible flexfield name; for example, **Organization Information EFF**.
3. Select the applicable extensible flexfield, and then click **Edit**.
4. Select the applicable Category. The category contexts are populated automatically.
5. Click **Manage Contexts**
6. In the Edit Context page, select the applicable Context, and then click **Edit**.
7. Select the applicable Segment, and then click **Edit**.
8. In the Edit Segment page, select the **BI Enabled** check box.
9. Click **Save**.

*Related Topics*

- [Configure Extensible Flexfields](#)

## Set Up Extensible Flexfield Security

In some cases, if you have a combination of secured and unsecured Extensible Flexfield contexts and are encountering NULL EFF attributes in your analyses, you need to set up security for the fields.

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area.
2. Search for the Extensible Flexfield Advanced Features\_1 profile option(FND\_EFF\_DEPLOYMENT\_CONFIG Profile Option Code).
3. In the Profile Values section, add a row, select Site as the Profile Level, and enter APPLY\_NEW\_BI\_PREDICATE in the **Profile Value** field.
4. Click **Save and Close**.

5. Make a small change in an EFF context associated to leaf level category, for example a segment sequence change.
6. Re-deploy the Item EFF to effect the new profile option. You don't need to run BI Extension.
7. Run the analyses to verify your change.

## Overview of the Essbase Rule File and Cubes

Generate the Essbase rule file by running the Create Rules XML File for BI Extender Automation scheduled process.

The Essbase rule file must be generated for all Oracle Essbase cubes mapped in the repository file (RPD).

### Job Status Conditions

The process status displays one of these conditions.

- **INIT:** The process has just begun and is waiting for the extender command line JAR to update the status with more details.
- **COMPLETED\_NO\_EXTENSION\_NEEDED:** No new Flexfield changes were detected in any of the Oracle Applications Cloud sources; because the RPD is already synchronized with all Flexfield changes, no changes were made in the RPD.
- **COMPLETED:** The RPD was successfully updated with Flexfield changes and uploaded into the Oracle Business Intelligence server.
- **FAILED:** Error conditions exist which require manual intervention.

#### *Related Topics*

- [Submit Scheduled Processes and Process Sets](#)

## Import Changes to Flexfields Automatically

### Overview of Flexfield Change Import

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

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

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

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

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

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

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

## Performance and Flexfields

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

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

## Run the Import Scheduled Process

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

### Run the Job

To run the process:

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

### Process Status Conditions

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

The process status displays one of the following conditions:

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

- **COMPLETED: PROCESS\_ERRORS:** Oracle Business Intelligence was updated with the Flexfield changes but with some warnings that require manual intervention.
- **FAILED:** Error conditions exist that require manual intervention.

## Successful Import Process

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

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

# Disable Flexfields as BI-Enabled

## Overview of Flexfield BI-Disablement

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

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

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

### Related Topics

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

## Disable Key Flexfields as BI-Enabled

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

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

## Disabling Key Flexfields



To disable key flexfields as BI-enabled:

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

## Disable Descriptive Flexfields as BI-Enabled

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

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

### Disabling Descriptive Flexfields

To disable descriptive flexfields as BI-enabled:

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

## Disable Extensible Flexfields as BI-Enabled

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

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

### Disabling Extensible Flexfields

To disable extensible flexfields as BI-enabled:

1. In the Setup and Maintenance work area, go to the **Manage Extensible Flexfields** task.
2. Enter the extensible flexfield Name; for example, "Organization Information EFF."
3. Select the applicable extensible flexfield and click **Edit** to navigate to Edit Extensible Flexfield.
4. Select the applicable Category. The category contexts are populated automatically.
5. Click **Manage Contexts** to navigate to Manage Contexts.
6. Select the applicable Context and click **Edit** to navigate to Edit Context.
7. Select the applicable Segment and click **Edit** to navigate to Edit Segment.
8. Deselect the **BI Enabled** option.

9. Click **Save**.

## SCM Descriptive Flexfields for Business Intelligence

This table shows the descriptive flexfields supported in Oracle Fusion Supply Chain Management along with the applicable subject areas, folders, parent folders and logical dimensions.

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
CARRIER_ORGANIZATION	Shipping Real Time	Shipping Method		Dim - Shipping Method
CST_ANALYSIS_CODES_B	Costing - Cost Accounting Real Time	Cost Analysis Group		Dim - Cost Analysis Group
CST_ANALYSIS_CODES_B	Costing - Item Cost Real Time	Cost Analysis Group		Dim - Cost Analysis Group
CST_ANALYSIS_GROUPS_B	Costing - Cost Accounting Real Time	Cost Analysis Group		Dim - Cost Analysis Group
CST_ANALYSIS_GROUPS_B	Costing - Item Cost Real Time	Cost Analysis Group		Dim - Cost Analysis Group
CST_COST_BOOKS_B	Costing - COGS and Gross Margin Real Time	Cost Organization Book		Dim - Cost Organization Book
CST_COST_BOOKS_B	Costing - Cost Accounting Real Time	Cost Organization Book		Dim - Cost Organization Book
CST_COST_BOOKS_B	Costing - Item Cost Real Time	Cost Organization Book		Dim - Cost Organization Book
CST_COST_BOOKS_B	Costing - Inventory Valuation Real Time	Cost Organization Book		Dim - Cost Organization Book
CST_COST_ELEMENTS_B	Costing - COGS and Gross Margin Real Time	Cost Element		Dim - Cost Element
CST_COST_ELEMENTS_B	Costing - Cost Accounting Real Time	Cost Element		Dim - Cost Element
CST_COST_ELEMENTS_B	Costing - Item Cost Real Time	Cost Element		Dim - Cost Element
CST_COST_ORG_BOOKS	Costing - COGS and Gross Margin Real Time	Cost Organization Book		Dim - Cost Organization Book

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
CST_COST_ORG_BOOKS	Costing - Cost Accounting Real Time	Cost Organization Book		Dim - Cost Organization Book
CST_COST_ORG_BOOKS	Costing - Item Cost Real Time	Cost Organization Book		Dim - Cost Organization Book
CST_COST_ORG_BOOKS	Costing - Inventory Valuation Real Time	Cost Organization Book		Dim - Cost Organization Book
CST_ELEMENT_ANALYSIS_GROUPS	Costing - Cost Accounting Real Time	Cost Analysis Group		Dim - Cost Analysis Group
CST_ELEMENT_ANALYSIS_GROUPS	Costing - Item Cost Real Time	Cost Analysis Group		Dim - Cost Analysis Group
CST_VAL_STRUCTURES_B	Costing - COGS and Gross Margin Real Time	Cost Valuation Unit		Dim - Cost Valuation Unit
CST_VAL_STRUCTURES_B	Costing - Cost Accounting Real Time	Cost Valuation Unit		
CST_VAL_STRUCTURES_B	Costing - Item Cost Real Time	Cost Valuation Unit		
CST_VAL_STRUCTURES_B	Costing - Inventory Valuation Real Time	Inventory Valuation - Onhand	Cost Valuation Unit	
CST_VAL_UNITS_B	Costing - COGS and Gross Margin Real Time	Cost Valuation Unit		Dim - Cost Valuation Unit
CST_VAL_UNITS_B	Costing - Cost Accounting Real Time	Cost Valuation Unit		
CST_VAL_UNITS_B	Costing - Item Cost Real Time	Cost Valuation Unit		
CST_VAL_UNITS_B	Costing - Inventory Valuation Real Time	Inventory Valuation - Onhand	Cost Valuation Unit	
DOO_PROCESS_DEFS_ADD_INFO	Distributed Order Orchestration - Fulfillment Lines Real Time	Orchestration Process		Dim - DOO Process
DOO_PROCESS_DEFS_ADD_INFO	Distributed Order Orchestration - Process Instances Real Time	Orchestration Process		

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
DOO_PROCESS_STEPS_ADD_INFO	Distributed Order Orchestration - Fulfillment Lines Real Time	Step		
DOO_PROCESS_STEPS_ADD_INFO	Distributed Order Orchestration - Process Instances Real Time	Steps	Step	Dim - Step
DOO_TASK_TYPES_ADD_INFO	Distributed Order Orchestration - Fulfillment Lines Real Time	Task		
DOO_TASK_TYPES_ADD_INFO	Distributed Order Orchestration - Process Instances Real Time	Steps	Tasks	Dim - Primary Task
DOO_TASK_TYPES_ADD_INFO	Distributed Order Orchestration - Fulfillment Lines Real Time	Tasks	Task	
EGO_CHANGE_LINE				Dim - New Item Request Line Details
EGO_ENGINEERING_CHANGES				Dim - New Item Request Details
EGP_CATEGORY_DFF				Dim - Item
EGP_CATEGORY_SETS_DFF				Dim - Item
EGP_COMPONENT_DFF				Dim - PIM - Components Details
EGP_ITEM_CLASS_DFF				Dim - PIM - Item Class
EGP_ITEM_RELATIONSHIPS_DFF				Dim - Cross Reference Item Details
EGP_ITEM_REVISIONS_DFF				Dim - PIM - Item and Revisions Details
EGP_REFERENCE_DESIGNATOR_DFF				Dim - PIM - Reference Designator
EGP_STRUCTURE_HEADER_DFF				Dim - PIM - Structure Details

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
EGP_SUBSTITUTE_COMPONENT_DFF				Dim - PIM - Substitute Component
EGP_SYSTEM_ITEMS_DFF				Dim - Item
EGP_TRADING_PARTNER_ITEMS_DFF				Dim - Trading Partner Item Details
GMS_AWARD_HEADERS_DFF				Dim - Award
GMS_AWARD_PERSONNEL_DFF				Dim - Personnel
GMS_AWARD_PROJECTS_DFF				Dim - Award Project
GMS_INSTITUTIONS_DFF				Dim - Award
INV_GRADES	Inventory - Inventory Balance Real Time	Grade		Dim - Inventory Lot
INV_GRADES	Inventory - Inventory Balance Real Time	Lot		
INV_GRADES	Inventory - Inventory Transactions Real Time	From Grade		Dim - Inventory Grade
INV_GRADES	Product Genealogy - Genealogy Instance Real Time	Lot Number {Genealogy Instance}		
INV_GRADES	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Child}		
INV_GRADES	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Parent}		
INV_GRADES	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Root Parent}		
INV_GRADES	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Child}		

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
INV_GRADES	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Leaf Child}		
INV_GRADES	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Parent}		Dim - Inventory Lot Parent
INV_GRADES	Product Genealogy - Genealogy Structure Real Time	Lot Number {Child Genealogy Instance}		Dim - Inventory Lot Child Genealogy Structure
INV_GRADES	Product Genealogy - Genealogy Structure Real Time	Lot Number {Parent Genealogy Instance}		
INV_GRADES	Product Genealogy - Genealogy Transaction Real Time	Lot Number {Transaction}		
INV_GRADES	Quality Inspection Results Real Time	Lot		
INV_GRADES	Shipping Real Time	Shipment Line	Inventory Details	
INV_ITEM_LOCATIONS	Costing - Cost Accounting Real Time	Locator		Dim - Storage Location
INV_ITEM_LOCATIONS	Costing - Inventory Valuation Real Time	Storage Location		
INV_ITEM_LOCATIONS	Inventory - Inventory Balance Real Time	Locator		
INV_ITEM_LOCATIONS	Inventory - Inventory Transactions Real Time	Locator		
INV_ITEM_LOCATIONS	Inventory Organization Real Time	Locator		
INV_ITEM_LOCATIONS	Receiving - In-Transit Advanced Shipment Notifications Real Time	In-Transit ASN	Locator	
INV_ITEM_LOCATIONS	Receiving - In-Transit Interorganization Inventory Transfers Real Time	In-Transit Interorganization Shipment	Locator	

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
INV_ITEM_LOCATIONS	Receiving - In-Transit Shipments Real Time	All In-Transit Shipments	Locator	
INV_ITEM_LOCATIONS	Receiving - Transactions Real Time	Receiving Transactions	Locator	
INV_ITEM_LOCATIONS	Shipping Real Time	Shipment Line	Locator	
INV_LOT_ATTRIBUTES	Distributed Order Orchestration - Fulfillment Lines Real Time	Lot and Serial Details		Dim - Lot Serial Details
INV_LOT_ATTRIBUTES	Inventory - Inventory Balance Real Time	Lot		Dim - Inventory Lot
INV_LOT_ATTRIBUTES	Inventory - Inventory Transactions Real Time	Lot		
INV_LOT_ATTRIBUTES	Manufacturing - Actual Production Real Time	Lot Number	Product Lot Attributes Descriptive Flexfields	
INV_LOT_ATTRIBUTES	Manufacturing - Material Usage Real Time	Component Lot Number	Component Lot Attributes Descriptive Flexfields	
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Instance Real Time	Lot Number {Genealogy Instance}		
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Child}		
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Parent}		
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Root Parent}		
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Child}		
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Leaf Child}		

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Parent}		Dim - Inventory Lot Parent
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Structure Real Time	Lot Number {Child Genealogy Instance}		Dim - Inventory Lot Child Genealogy Structure
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Structure Real Time	Lot Number {Parent Genealogy Instance}		
INV_LOT_ATTRIBUTES	Product Genealogy - Genealogy Transaction Real Time	Lot Number {Transaction}		
INV_LOT_ATTRIBUTES	Quality Inspection Results Real Time	Lot		
INV_LOT_ATTRIBUTES	Shipping Real Time	Shipment Line	Inventory Details	
INV_LOT_NUMBERS	Distributed Order Orchestration - Fulfillment Lines Real Time	Lot and Serial Details		Dim - Lot Serial Details
INV_LOT_NUMBERS	Inventory - Inventory Balance Real Time	Lot		Dim - Inventory Lot
INV_LOT_NUMBERS	Inventory - Inventory Transactions Real Time	Lot		
INV_LOT_NUMBERS	Manufacturing - Actual Production Real Time	Lot Number	Product Lot Number Descriptive Flexfields	
INV_LOT_NUMBERS	Manufacturing - Material Usage Real Time	Component Lot Number	Component Lot Number Descriptive Flexfields	
INV_LOT_NUMBERS	Product Genealogy - Genealogy Instance Real Time	Lot Number {Genealogy Instance}		
INV_LOT_NUMBERS	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Child}		
INV_LOT_NUMBERS	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Parent}		



Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
INV_LOT_NUMBERS	Product Genealogy - Genealogy Object Composition Real Time	Lot Number {Root Parent}		
INV_LOT_NUMBERS	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Child}		
INV_LOT_NUMBERS	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Leaf Child}		
INV_LOT_NUMBERS	Product Genealogy - Genealogy Object Where Used Real Time	Lot Number {Parent}		Dim - Inventory Lot Parent
INV_LOT_NUMBERS	Product Genealogy - Genealogy Structure Real Time	Lot Number {Child Genealogy Instance}		Dim - Inventory Lot Child Genealogy Structure
INV_LOT_NUMBERS	Product Genealogy - Genealogy Structure Real Time	Lot Number {Parent Genealogy Instance}		
INV_LOT_NUMBERS	Product Genealogy - Genealogy Transaction Real Time	Lot Number {Transaction}		
INV_LOT_NUMBERS	Quality Inspection Results Real Time	Lot		
INV_LOT_NUMBERS	Shipping Real Time	Shipment Line	Inventory Details	
INV_MATERIAL_TXNS	Inventory - Inventory Transactions Real Time	Inventory Transactions Details		Dim - Inventory Details
INV_ORG_PARAMETERS				Dim - Inventory Org
INV_SECONDARY_INVENTORIES	Costing - Cost Accounting Real Time	Subinventory		Dim - Storage Location
INV_SECONDARY_INVENTORIES	Costing - Inventory Valuation Real Time	Storage Location		
INV_SECONDARY_INVENTORIES	Inventory - Inventory Balance Real Time	Subinventory		

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
INV_SECONDARY_INVENTORIES	Inventory - Inventory Supply Real Time	In transit Inventory Supply	Source Subinventory	
INV_SECONDARY_INVENTORIES	Inventory - Inventory Supply Real Time	Subinventory		
INV_SECONDARY_INVENTORIES	Inventory - Inventory Transactions Real Time	Subinventory		
INV_SECONDARY_INVENTORIES	Inventory Organization Real Time	Subinventory		
INV_SECONDARY_INVENTORIES	Receiving - Interorganization Receipts Real Time	Interorganization Receipts	Receiving Subinventory	
INV_SECONDARY_INVENTORIES	Receiving - Purchase Receipts Real Time	Purchase Receipts	Receiving Subinventory	
INV_SECONDARY_INVENTORIES	Receiving - Receipts Real Time	All Receipts	Receiving Subinventory	
INV_SECONDARY_INVENTORIES	Receiving - Transactions Real Time	Receiving Transactions	Receiving Subinventory	
INV_SECONDARY_INVENTORIES	Receiving - Unordered Receipts Real Time	Current Unordered Receipts	Receiving Subinventory	
INV_SECONDARY_INVENTORIES	Shipping Real Time	Shipment Line	Subinventory	
INV_SERIAL_ATTRIBUTES	Manufacturing - Actual Production Real Time	Serial Number	Serial Attributes Descriptive Flexfields	
INV_SERIAL_ATTRIBUTES	Manufacturing - Material Usage Real Time	Component Serial Number	Component Serial Attributes Descriptive Flexfields	
INV_SERIAL_ATTRIBUTES	Manufacturing - Material Usage Real Time	Product Serial Number	Product Serial Attributes Descriptive Flexfields	
INV_SERIAL_ATTRIBUTES	Manufacturing - Production Exceptions Real Time	Product Serial Number	Product Serial Attributes Descriptive Flexfields	
INV_SERIAL_ATTRIBUTES	Manufacturing - Work Order Performance Real Time	Product Serial Number	Product Serial Attributes Descriptive Flexfields	

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
INV_SERIAL_ATTRIBUTES	Shipping Real Time	Shipment Line	Serial Number	Dim - Serial Number
INV_SERIAL_ATTRIBUTES	Shipping Real Time	Shipment Line	Serial Number To	Dim - Serial Number To
INV_SERIAL_NUMBERS	Manufacturing - Actual Production Real Time	Serial Number	Serial Number Descriptive Flexfields	
INV_SERIAL_NUMBERS	Manufacturing - Material Usage Real Time	Component Serial Number	Component Serial Number Descriptive Flexfields	
INV_SERIAL_NUMBERS	Manufacturing - Material Usage Real Time	Product Serial Number	Product Serial Number Descriptive Flexfields	
INV_SERIAL_NUMBERS	Manufacturing - Production Exceptions Real Time	Product Serial Number	Product Serial Number Descriptive Flexfields	
INV_SERIAL_NUMBERS	Manufacturing - Work Order Performance Real Time	Product Serial Number	Product Serial Number Descriptive Flexfields	
INV_SERIAL_NUMBERS	Shipping Real Time	Shipment Line	Serial Number	Dim - Serial Number
INV_SERIAL_NUMBERS	Shipping Real Time	Shipment Line	Serial Number To	Dim - Serial Number To
INV_TRANSACTION_REASONS	Receiving - In-Transit Advanced Shipment Notifications Real Time	In-Transit ASN	Transaction Reasons	Dim - Receipt Transaction Reasons
INV_TRANSACTION_REASONS	Receiving - In-Transit Interorganization Inventory Transfers Real Time	In-Transit Interorganization Shipment	Transaction Reasons	
INV_TRANSACTION_REASONS	Receiving - In-Transit Shipments Real Time	All In-Transit Shipments	Transaction Reasons	
INV_TRANSACTION_REASONS	Receiving - Transactions Real Time	Receiving Transactions	Transaction Reasons	
INV_TRANSACTION_TYPES	Inventory - Inventory Transactions Real Time	Transaction Type		Dim - Movement Type
INV_TRANSFER_ORDER_DISTRIBS	Inventory - Inventory Transfer Order Real Time	Transfer Order Distribution Details		Dim - Transfer Order Details
INV_TRANSFER_ORDER_HEADERS	Inventory - Inventory Transfer Order Real Time	Transfer Order Details		Dim - Transfer Order Details

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
INV_TRANSFER_ORDER_LINES	Inventory - Inventory Transfer Order Real Time	Transfer Order Line Details		Dim - Transfer Order Details
INV_TXN_SOURCE_TYPES	Inventory - Inventory Transactions Real Time	Transaction Source Type		Dim - Inventory Transaction Source Type
PROJECTS_STD_COST_COLLECTION	Costing - Cost Accounting Real Time	Project User Defined Attributes		Dim - Cost Transaction Details
PROJECTS_STD_COST_COLLECTION	Costing - Work Order Costs Real Time	Project User Defined Attributes		Dim - Costing - Work Order Cost Details
PROJECTS_STD_COST_COLLECTION	Distributed Order Orchestration - Fulfillment Lines Real Time	Project User Defined Attributes		Dim - Sales Order Details
PROJECTS_STD_COST_COLLECTION	Inventory - Inventory Transactions Real Time	Project User Defined Attributes		Dim - Inventory Details
PROJECTS_STD_COST_COLLECTION	Inventory - Inventory Transfer Order Real Time	Project User Defined Attributes		Dim - Transfer Order Details
RCV_SHIPMENT_HEADERS	Receiving - In-Transit Advanced Shipment Notifications Real Time	In-Transit ASN	In-Transit ASN Header Details	Dim - Inbound Shipment Details
RCV_SHIPMENT_HEADERS	Receiving - In-Transit Interorganization Inventory Transfers Real Time	In-Transit Interorganization Shipment	In-Transit Interorganization Shipment Header Details	
RCV_SHIPMENT_HEADERS	Receiving - In-Transit Shipments Real Time	All In-Transit Shipments	All In-Transit Shipments Header Details	
RCV_SHIPMENT_HEADERS	Receiving - Interorganization Receipts Real Time	Interorganization Receipts	Interorganization Receipt Header Details	Dim - Receipt Details
RCV_SHIPMENT_HEADERS	Receiving - Purchase Receipts Real Time	Purchase Receipts	Purchase Receipt Header Details	
RCV_SHIPMENT_HEADERS	Receiving - Receipts Real Time	All Receipts	All Receipt Header Details	
RCV_SHIPMENT_HEADERS	Receiving - Unordered Receipts Real Time	Current Unordered Receipts	Unordered Receipts Header Details	

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
RCV_SHIPMENT_LINES	Receiving - In-Transit Advanced Shipment Notifications Real Time	In-Transit ASN	In-Transit ASN Header Details	
RCV_SHIPMENT_LINES	Receiving - In-Transit Interorganization Inventory Transfers Real Time	In-Transit Interorganization Shipment	In-Transit Interorganization Shipment Line Details	Dim - Inbound Shipment Details
RCV_SHIPMENT_LINES	Receiving - In-Transit Shipments Real Time	All In-Transit Shipments	All In-Transit Shipment Line Details	
RCV_SHIPMENT_LINES	Receiving - Interorganization Receipts Real Time	Interorganization Receipts	Interorganization Receipt Line Details	Dim - Receipt Details
RCV_SHIPMENT_LINES	Receiving - Purchase Receipts Real Time	Purchase Receipts	Purchase Receipt Line Details	
RCV_SHIPMENT_LINES	Receiving - Receipts Real Time	All Receipts	All Receipt Line Details	
RCV_SHIPMENT_LINES	Receiving - Unordered Receipts Real Time	Current Unordered Receipts	Unordered Receipts Line Details	
RCV_TRANSACTIONS	Receiving - Transactions Real Time	Receiving Transactions	Receiving Transaction Details	Dim - Receipt Details
WIE_OPERATION_TRANSACTIONS	Manufacturing - Work Order Performance Real Time	Operation Transaction Details	Work Order Operation Transactions Descriptive Flexfields	
WIE_RESOURCE_TRANSACTIONS	Manufacturing - Resource Usage Real Time	Resource Transaction Details	Work Order Resource Transactions Descriptive Flexfields	
WIE_WO_OPERATION_MATERIALS	Manufacturing - Material Usage Real Time	Work Order Operation Materials	Work Order Operation Material Descriptive Flexfields	
WIE_WO_OPERATION_OUTPUTS	Manufacturing - Actual Production Real Time	Work Order Operation Output Details	Work Order Operation Outputs Descriptive Flexfields	
WIE_WO_OPERATION_RESOURCE_INSTANCES	Manufacturing - Resource Usage Real Time	Work Order Operation Resources	Work Order Operation Resource Instance Descriptive Flexfields	

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
WIE_WO_OPERATION_RESOURCES	Manufacturing - Resource Usage Real Time	Work Order Operation Resources	Work Order Operation Resource Descriptive Flexfields	
WIE_WO_OPERATIONS	Manufacturing - Actual Production Real Time	Work Order Operations	Work Order Operations Descriptive Flexfields	
WIE_WO_OPERATIONS	Manufacturing - Material Usage Real Time	Work Order Operations	Work Order Operations Descriptive Flexfields	
WIE_WO_OPERATIONS	Manufacturing - Production Exceptions Real Time	Work Order Operations	Work Order Operations Descriptive Flexfields	
WIE_WO_OPERATIONS	Manufacturing - Purchased Item Usage Real Time	Work Order Operations	Work Order Operations Descriptive Flexfields	
WIE_WO_OPERATIONS	Manufacturing - Resource Usage Real Time	Work Order Operations	Work Order Operations Descriptive Flexfields	
WIE_WO_OPERATIONS	Manufacturing - Work Order Performance Real Time	Work Order Operations	Work Order Operations Descriptive Flexfields	
WIE_WORK_ORDERS	Manufacturing - Actual Production Real Time	Work Order	Work Order Header Descriptive Flexfields	
WIE_WORK_ORDERS	Manufacturing - Material Usage Real Time	Work Order	Work Order Header Descriptive Flexfields	
WIE_WORK_ORDERS	Manufacturing - Production Exceptions Real Time	Work Order	Work Order Header Descriptive Flexfields	
WIE_WORK_ORDERS	Manufacturing - Purchased Item Usage Real Time	Work Order	Work Order Header Descriptive Flexfields	
WIE_WOR_ORDERS	Manufacturing - Resource Usage Real Time	Work Order	Work Order Header Descriptive Flexfields	
WIE_WORK_ORDERS	Manufacturing - Work Order Performance Real Time	Work Order	Work Order Header Descriptive Flexfields	
WIS_EQUIPMENT_RESOURCE_INSTANCES	Manufacturing - Production Exceptions Real Time	Resource Instance	Equipment Resource Instance Flexfields	
WIS_EQUIPMENT_RESOURCE_INSTANCES	Manufacturing - Resource Usage Real Time	Resource Instance	Equipment Resource Instance Flexfields	

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
WIS_LABOR_RESOURCE_INSTANCES	Manufacturing - Production Exceptions Real Time	Resource Instance	Labor Resource Instance Flexfields	
WIS_LABOR_RESOURCE_INSTANCES	Manufacturing - Resource Usage Real Time	Resource Instance	Labor Resource Instance Flexfields	
WIS_RESOURCES	Manufacturing - Production Exceptions Real Time	Resource	Resource Descriptive Flexfields	
WIS_RESOURCES	Manufacturing - Resource Usage Real Time	Resource	Resource Descriptive Flexfields	
WIS_WORK_AREAS	Manufacturing - Actual Production Real Time	Manufacturing Work Center	Manufacturing Work Area Descriptive Flexfields	
WIS_WORK_AREAS	Manufacturing - Material Usage Real Time	Manufacturing Work Center	Manufacturing Work Area Descriptive Flexfields	
WIS_WORK_AREAS	Manufacturing - Production Exceptions Real Time	Manufacturing Work Area	Manufacturing Work Area Descriptive Flexfields	
WIS_WORK_AREAS	Manufacturing- Purchased Item Usage Real Time	Manufacturing Work Center	Manufacturing Work Area Descriptive Flexfields	
WIS_WORK_AREAS	Manufacturing - Resource Usage Real Time	Manufacturing Work Center	Manufacturing Work Area Descriptive Flexfields	
WIS_WORK_AREAS	Manufacturing - Work Order Performance Real Time	Manufacturing Work Center	Manufacturing Work Area Descriptive Flexfields	
WIS_WORK_CENTERS	Manufacturing - Actual Production Real Time	Manufacturing Work Center	Manufacturing Work Center Descriptive Flexfields	
WIS_WORK_CENTERS	Manufacturing - Material Usage Real Time	Manufacturing Work Center	Manufacturing Work Center Descriptive Flexfields	
WIS_WORK_CENTERS	Manufacturing - Production Exceptions Real Time	Manufacturing Work Center	Manufacturing Work Center Descriptive Flexfields	
WIS_WORK_CENTERS	Manufacturing - Purchased Item Usage Real Time	Manufacturing Work Center	Manufacturing Work Center Descriptive Flexfields	
WIS_WORK_CENTERS	Manufacturing - Resource Usage Real Time	Manufacturing Work Center	Manufacturing Work Center Descriptive Flexfields	

Descriptive Flexfield Code	Subject Area	Folder	Parent Folder	Dimension Name
WIS_WORK_CENTERS	Manufacturing - Work Order Performance Real Time	Manufacturing Work Center	Manufacturing Work Center Descriptive Flexfields	
WSH_CARRIERS	Receiving - In-Transit Advanced Shipment Notifications Real Time	In-Transit ASN	Carrier	Dim - Carrier
WSH_CARRIERS	Receiving - In-Transit Interorganization Inventory Transfers Real Time	In-Transit Interorganization Shipment	Carrier	Dim - Carrier
WSH_CARRIERS	Receiving - In-Transit Shipments Real Time	All In-Transit Shipments	Carrier	Dim - Carrier
WSH_CARRIERS	Receiving - Interorganization Receipts Real Time	Interorganization Receipts	Carrier	Dim - Carrier
WSH_CARRIERS	Receiving - Purchase Receipts Real Time	Purchase Receipts	Carrier	Dim - Carrier
WSH_CARRIERS	Receiving - Receipts Real Time	All Receipts	Carrier	Dim - Carrier
WSH_CARRIERS	Receiving - Unordered Receipts Real Time	Current Unordered Receipts	Carrier	Dim - Carrier
WSH_CARRIERS	Shipping Real Time	Carrier		Dim - Carrier
WSH_DELIVERY_DETAILS	Shipping Real Time	Shipment	Shipment Details	Dim - Sales Pick Details
WSH_NEW_DELIVERIES	Shipping Real Time	Shipment Line	Shipment Line Summary	Dim - Sales Pick Details

## SCM Extensible Flexfields for Business Intelligence

This topic lists the extensible flexfields supported in Oracle Fusion Cloud SCM:

Extensible Flexfield	Location in Oracle Cloud SCM	Folder in Oracle BI
EGO_ITEM_EFF	Manage Items	Product Management - Change Order Approvals Real Time > Item > Main



Extensible Flexfield	Location in Oracle Cloud SCM	Folder in Oracle BI
		Product Management - Change Order Line Real Time > Item > Main  Product Management - Change Order Real Time > Item > Main  Product Management - Components Real Time > Item > Main  Product Management - Cross Reference Item Real Time > Item > Main  Product Management - Item Revisions Real Time > Item > Main  Product Management - Item Supplier Uploads Real Time > Item > Main  Product Management - New Item Request Approvals Real Time > Item > Main  Product Management - New Item Request Line Real Time > Item > Main  Product Management - New Item Request Real Time > Item > Main  Product Management - Related Item Real Time > Item > Main  Product Management - Source System Item Real Time > Item > Main  Product Management - Structures Real Time > Item > Main  Product Management - Structures and Components Real Time: Parent Assembly Attributes > Item > Main and Component Assembly Attributes > Item > Main  Product Management - Trading Partner Item Real Time > Item > Main  Product Management - Where Used Real Time: Where Used Item Attributes > Item > Main, Item Attributes > Item > Main, and Parent of Where Used Item Attributes > Item > Main
PROJECTS_STD_COST_COLLECTION	Manage Project Standard Cost Collection	Order Management - Fulfillment Lines Real Time > Project Details



# 5 Analyses, Reports, and Dashboards Modification

## Analyses and Dashboards

### How Data Is Structured for Analytics

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

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

### Columns

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

Column Type	Description	Example
Fact	Provides a measure of something, meaning that the values are numbers.	Total
Attribute	Represents a piece of information about a business object, with values that are dates, IDs, or text.  <b>Note:</b> Attribute columns can be flexfield segments imported into the BI repository.	Start Date
Hierarchy	Holds data values that are organized in a hierarchical manner.	Time, with sublevels: <ul style="list-style-type: none"> <li>• Year</li> <li>• Quarter</li> <li>• Month</li> </ul>

### Subject Areas

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

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

## Folders

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

- **Fact folders:**
  - Contain fact columns.
  - Are usually the last in a list of folders and are usually named after the subject area.
- **Dimension folders:**
  - Contain attribute and hierarchical columns.
  - Are joined to the fact folder within a subject area.

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

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

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

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

### *Related Topics*

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

## Create and Edit Analyses Using a Wizard

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

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

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

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

## Select Columns Page

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

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

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

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

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

## Select Views Page

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

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

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

## Edit Table Page

Here are the layout options you can select for tables:

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

## Edit Graph Page

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

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

## Highlight Page

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

### Related Topics

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

# Reports

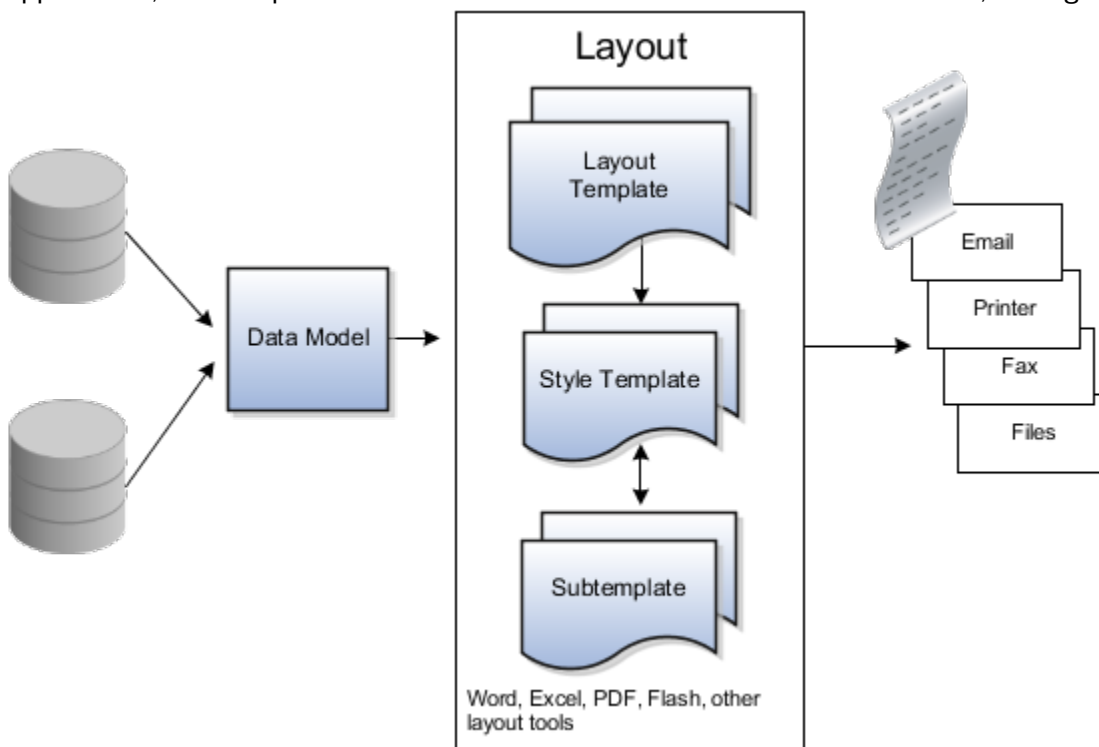
## Overview of Analytics Publisher

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

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

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

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



## How You Access and Modify Report Components

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

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

## Accessing the BI Catalog

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

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

## Predefined Reports

A special Customize option is available only:

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

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

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

## Predefined Data Models

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

### Related Topics

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

## Reflect Changes from Edited Reports Sooner

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

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



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

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

## Create Profile Options to Control the Refresh

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

Scope	Profile Option Code	Examples
Global	BIP_CLIENT_REFRESH_TIME	BIP_CLIENT_REFRESH_TIME
Product Family	BIP_CLIENT_REFRESH_TIME_<FAMILY>	<ul style="list-style-type: none"> <li>BIP_CLIENT_REFRESH_TIME_FIN</li> <li>BIP_CLIENT_REFRESH_TIME_HCM</li> <li>BIP_CLIENT_REFRESH_TIME_PRC</li> <li>BIP_CLIENT_REFRESH_TIME_PRJ</li> <li>BIP_CLIENT_REFRESH_TIME_SCM</li> </ul>
Product	BIP_CLIENT_REFRESH_TIME_<FAMILY>_<PRODUCT>	<ul style="list-style-type: none"> <li>BIP_CLIENT_REFRESH_TIME_FIN_AP</li> <li>BIP_CLIENT_REFRESH_TIME_HCM_PER</li> <li>BIP_CLIENT_REFRESH_TIME_PRC_PON</li> <li>BIP_CLIENT_REFRESH_TIME_PRJ_PJE</li> <li>BIP_CLIENT_REFRESH_TIME_SCM_EGO</li> </ul>

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

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

Now you're ready to create your profile options!

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

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

## Set the Refresh Interval

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

**CAUTION:** Make sure to enter a whole number.

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

### Related Topics

- [Update Existing Setup Data](#)
- [Set Profile Option Values](#)
- [Modules in Application Taxonomy](#)

## Where to Save Analytics and Reports

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

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

### Shared Folders and the Custom Subfolder

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

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

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

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

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

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

## My Folders

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

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

## Create Folders

Create folders in Custom or My Folders.

To create folders:

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

## Automatically Created Folders

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

### Related Topics

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

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

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

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

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

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

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

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

## Work with Analyses and Reports

### Create a Change Order Approval Cycle Time by Reason Analysis

You are a product manager and you want to create an analysis to help you review change order approval cycle times. The approval times are to be analyzed by change reasons.

The following table summarizes key decisions for creating the analysis.

Decisions to Consider	In This Example
What information to include?	<ul style="list-style-type: none"> <li>Change Order Approval Cycle Time</li> <li>Reason</li> </ul>
What type of layout is required?	Table with a bar below it
Is this analysis available for others to use?	No. Save it to My Folders.

To create an analysis of Change Order Approval Cycle time by Reason, complete these tasks:

1. Select columns
2. Define the layout
3. Save the analysis

#### Selecting Columns

1. Navigate to Reports and Analytics work area.
2. Click **Create**.

3. Select **Analysis**.
4. In the Select Subject Area Window, select the **Product Management - Change Order Real Time** subject area.
5. On the Create Analysis: Select Columns page, expand the **Product Management - Change Order Real Time** folder.
6. Expand the **Change Order** folder.
7. Select **Approval Cycle Time** and click the **Add** icon button to move the column to the Selected Columns area.
8. Expand the **Change Order Reason** folder.
9. Select **Change Order Reason** and click the **Add** icon button to move the column to the Selected Columns area.
10. Click **Next**.

## Defining the Layout

1. On the Create Analysis: Select Views page, enter Change Order Approval Cycle Time in the **Name** field.
2. Next to the Table field, click **None** to open the Table menu.
3. Select **Table (recommended)**.
4. Next to the Graph field, click **None** to open the Graph menu.
5. Select **Bar (recommended)**.
6. Use the default layout value of Table above Graph.
7. Click **Next**.
8. On the Create Analysis: Edit Table page, select Change Order Reason and click the **Move selected item to top of list** icon.
9. Click **Next**.
10. On the Create Analysis: Edit Graph page, click **Next**.
11. On the Create Analysis: Sort and Filter Page, click **Next**.

## Saving the Analysis

1. On the Create Analysis: Save page, enter Change Order Approval Cycle Time by Reason in the **Analysis Name** field, enter a description and then select **My folders** in the Save In region.
2. Click **Submit**.
3. Click **OK**.

# Use UOM Columns with ToUOM Session Variable in Dashboards, Analyses

You can use predefined columns in some subject areas for Oracle Fusion Cloud Supply Chain Planning and the ToUOM session variable to author dashboards and analyses in which the primary or transaction unit of measure (UOM) for data is changed to a reporting UOM.

You can use these columns with the `ToUOM` session variable:

- Reporting UOM Prompt: Use this column only to create prompts in dashboards and analyses. This column returns UOM values from `INV_UNITS_OF_MEASURE_TL.UNIT_OF_MEASURE` or UOM codes from `INV_UNITS_OF_MEASURE_B.UOM_CODE`.
- UOM Conversion From Primary to Reporting: Use this column to get the conversion factor from the primary to the reporting UOM. Then, multiply the quantity in the primary UOM with the conversion factor to get the quantity in the reporting UOM.
- UOM Conversion From Transaction to Reporting: Use this column to get the conversion factor from the transaction to the reporting UOM. Then, multiply the quantity in the transaction UOM with the conversion factor to get the quantity in the reporting UOM.

The predefined columns are available in these subject areas:

- Costing - Work Order Costs Real Time
- Inventory - Inventory Balance Real Time
- Inventory - Inventory Transactions Real Time
- Manufacturing - Actual Production Real Time
- Order Management - Fulfillment Lines Real Time
- Order Management - Order Lines Real Time
- Shipping Real Time

You can use these columns and the `ToUOM` session variable in these ways:

- Create a UOM prompt for a dashboard
- Create a UOM prompt for an analysis
- Set the `ToUOM` session variable to a UOM code in an analysis

## Create a UOM Prompt for a Dashboard

To create a UOM prompt for a dashboard, follow these steps:

1. Create an analysis for a subject area that has the predefined columns.

To provide the user with the UOM conversion factor, include the UOM Conversion From Primary to Reporting or UOM Conversion From Transaction to Reporting column.

- a. Save the analysis.

2. Create a column-based dashboard prompt for the subject area.

- a. Under Definition, click **New**, and select **Column Prompt**.

The Select Column dialog box opens.

- b. Select the Reporting UOM Prompt column, and click **OK**.

The New Prompt dialog box opens.

- c. Under Options, select **Request Variable** in the **Set a variable** list.

A field appears under the list.

- d. Enter **ToUOM** in the field.

- e. Save the dashboard prompt.

3. Create a dashboard.

- a. Add the dashboard prompt and analysis to the dashboard.

- b. Save the dashboard.

When you change the value in the **Reporting UOM Prompt** list of the dashboard, the UOM Conversion From Primary to Reporting or UOM Conversion From Transaction to Reporting column shows the conversion factor from the primary or transaction UOM to the reporting UOM.

## Create a UOM Prompt for an Analysis

The procedure described in this section requires you to know the corresponding codes for UOM values.

To create a UOM prompt for an analysis, follow these steps:

1. Create an analysis for a subject area that has the predefined columns.

To provide the user with the UOM conversion factor, include the UOM Conversion From Primary to Reporting or UOM Conversion From Transaction to Reporting column.

2. On the Prompts tab, click **New**, and select **Variable Prompt**.

The New Prompt dialog box opens.

3. In the **Prompt for** list, select **Request Variable**.
4. In the field next to the **Prompt for** list, enter **ToUOM**.
5. In the **User Input** list, select **Choice List**.

The **Choice List Values** list appears.

6. In the list, select **SQL Results**.

A field for entering SQL code appears.

7. Replace the SQL statement with another in the following format: `SELECT DESCRIPTOR_IDOF("<subject area>". "Reporting UOM Prompt") FROM "<subject area>" FETCH FIRST 65001 ROWS ONLY`

Substitute values for the text within the angle brackets.

For example, a complete SQL statement is as follows: `SELECT DESCRIPTOR_IDOF("Inventory - Inventory Balance Real Time"."- Main"."Reporting UOM Prompt") FROM "Inventory - Inventory Balance Real Time" FETCH FIRST 65001 ROWS ONLY`

8. Click **OK**.
9. Save the analysis.

When you run the analysis, you're first prompted to select a UOM code in a list. When you click **OK**, the analysis results are displayed, and the UOM Conversion From Primary to Reporting or UOM Conversion From Transaction to Reporting column shows the conversion factor from the primary or transaction UOM to the reporting UOM.

## Set the ToUOM Session Variable to a UOM Code in an Analysis

The procedure described in this section requires you to know the corresponding codes for UOM values.

To set the `ToUOM` session variable to a UOM code in an analysis, follow these steps:

1. Create an analysis for a subject area that has the predefined columns.

To provide the user with the UOM conversion factor, include the UOM Conversion From Primary to Reporting or UOM Conversion From Transaction to Reporting column.

2. On the Advanced tab, under Advanced SQL Clauses, in **Prefix**, enter an SQL statement in the following format: `SET VARIABLE ToUOM='<UOM Code>';`

Substitute a UOM code for the text within the angle brackets.

For example, a complete SQL statement is as follows: `SET VARIABLE ToUOM='B050';`

3. Click **Apply SQL**.
4. Save the analysis.

When you run the analysis, the UOM Conversion From Primary to Reporting or UOM Conversion From Transaction to Reporting column shows the conversion factor from the primary or transaction UOM to the reporting UOM. Moreover, you can't select any other code for the reporting UOM.

### Related Topics

- [Supply Chain Management Repository and Session Variables for Business Intelligence](#)

## Improve Query Performance in Analyses for the Order Management - Order Holds Real Time Subject Area

Use this procedure to improve query performance for Order Management - Order Holds Real Time subject area queries.

1. In the Browse Catalog UI, click **New > Analysis**.
2. Select **Order Holds - Order Management Real Time**.
3. In the **Advanced** tab, find the **Advanced SQL Clauses** section.
4. In the **Prefix** field, enter this value: `SET VARIABLE OBIS_DBFEATURES_IS_LEFT_OUTER_JOIN_SUPPORTED=0,OBIS_ORACLEDB_HINTS_FOR_TOP_SELECT='NO_MERGE (@HoldInstancePVO) '`;
5. Click **Apply SQL**.
6. In the **SQL Issued**, verify that the hints were prefixed to the logical query.
7. To review the result changes, use the **Results** tab.

**Note:** If the **Order Holds** subject area is used in a cross-subject area query, you must apply the hint to the **Order Holds** subject area only.

## Guidelines for Working with the Supply Chain Financial Orchestration - Real Time Subject Area

This topic provides guidelines for working with the Supply Chain Financial Orchestration - Real Time subject area in Oracle Transactional Business Intelligence.

While working with this subject area, you can do the following:

- Apply a filter on the Event Status Code column so that you can filter the rows in your analysis by the event statuses that you require.
- Ensure that item names are displayed for all event status codes.
- Create an analysis to return rows for both task-level and event-level messages without any empty rows.

### Use the Event Status Code Column To Filter Event Statuses

Applying a filter on the Event Status Code column is useful because the Event Status column returns similar information for some event status codes. For example, for the DISCARDED and WAITING\_FOR\_DOC\_ENRICHMENT event status codes, the event status is "Transaction event is not started."

To filter rows in your analysis by event status codes, follow these steps:

1. In Oracle Transactional Business Intelligence, create an analysis for the Supply Chain Financial Orchestration - Real Time subject area.
2. On the Criteria tab, from Ownership Change Events > Ownership Change Event Details, add the Event Status Code and Event Status columns to your analysis.



- Add other columns that you require to your analysis.
3. In the Options menu for the Event Status Code column, select **Filter**.  
The New Filter dialog box opens.
  4. In **Operator**, select **is equal to / is in**.
  5. In **Value**, select the check boxes for the event status codes by which you want to filter the event statuses.
  6. Click **OK**.
  7. Modify the other columns as required, and save your analysis.

## Ensure That Item Names Are Displayed for All Event Status Codes

For some event status codes such as DISCARDED, the Item Name column returns the null value unless a formula is applied to the column.

To return item names for all event status codes, follow these steps:

1. In Oracle Transactional Business Intelligence, create an analysis for the Supply Chain Financial Orchestration - Real Time subject area.
2. On the Criteria tab, from Ownership Change Events > Item > Main, add the Item Name column to your analysis.  
Add other columns that you require to your analysis.
3. In the Options menu for the Item Name column, select **Edit Formula**.  
The Edit Column Formula dialog box opens.
4. On the Column Formula tab, in **Column Formula**, enter the following code:  

```
Case when "Ownership Change Event Details"."Transaction Status" is null then "Source Document  
Details"."Source Document Item Number" else "Main"."Item Name" end
```
5. Click **OK**.
6. Modify the other columns as required, and save your analysis.

## Create an Analysis for Returning Both Task-Level and Event-Level Messages

You can create an analysis to return rows for both task-level and event-level messages in alternate rows without any empty rows.

To create the analysis for returning rows for both task-level and event-level messages, follow these steps:

1. In Oracle Transactional Business Intelligence, create an analysis for the Supply Chain Financial Orchestration - Real Time subject area.
2. On the Criteria tab, add columns to your analysis:
  - Ownership Change Events > Ownership Change Event Details: Business Process Type, Event Number, Event Type, Event Id, Event Date, Event Status, and Event Status Code
  - Financial Orchestration Flow Details > Financial Route Details: Financial Route Id
  - Task Messages: Message Type, Message Details, Message Category, and Additional InformationAdd other columns that you require to your analysis.
3. In the Options menu for the Event Status Code column, select **Filter**.  
The New Filter dialog box opens.
4. In **Operator**, select **is equal to / is in**.
5. In **Value**, select the check boxes for the COMPLETED and ORCHESTRATED event status codes.

These event status codes pertain to task-level messages.

6. Click **OK**.
7. On the Selected Columns section title, click the **Combine results based on union, intersection, and difference operations** icon, and in the Select Subject Area dialog box, select the Supply Chain Financial Orchestration - Real Time subject area.
8. Under Result Columns, ensure that **Union** is selected for combining the results of the two queries.
9. For the second query, select the same columns that you selected for the first query and in the same order.
10. In the Options menu for the Event Status Code column, select **Filter**.

The New Filter dialog box opens.

11. In **Operator**, select **is equal to / is in**.
12. In **Value**, select the check boxes for the DISCARDED, EVENT\_UNUSED, PARENT\_FLOW\_NOT\_COMPLETED, and WAITING\_FOR\_DOC\_ENRICHMENT event status codes.

These event status codes pertain to event-level messages.

13. Click **OK**.
14. Modify the other columns as required, and save your analysis.

*Related Topics*

## How You Use Attributes for Lots and Serial Numbers in Reports and Analyses for Receiving

This topic explains how you can use attributes for lots and serial numbers in reports and analyses for Oracle Receiving.

This table lists the folders in Receiving subject areas that contain attributes for lots and serial numbers:

Subject Area	Folder
Receiving - In-Transit Advanced Shipment Notifications Real Time	<ul style="list-style-type: none"> <li>• Lot</li> <li>• Lot and Serial Number</li> <li>• Serial Number</li> </ul>
Receiving - In-Transit Interorganization Inventory Transfers Real Time	<ul style="list-style-type: none"> <li>• Lot</li> <li>• Lot and Serial Number</li> <li>• Serial Number</li> </ul>
Receiving - In-Transit Shipments Real Time	<ul style="list-style-type: none"> <li>• Lot</li> <li>• Lot and Serial Number</li> <li>• Serial Number</li> </ul>
Receiving - Transactions Real Time	<ul style="list-style-type: none"> <li>• Lot</li> <li>• Lot and Serial Number</li> <li>• Serial Number</li> </ul>

You can use these folders in your reports and analyses to cater to these situations:

- Your items are all controlled by lots, serial numbers, or lots and serial numbers.
- Some of your items are controlled by lots, others by serial numbers, and the remaining by lots and serial numbers.

## Retrieving Items Controlled by Lots, Serial Numbers, or Lots and Serial Numbers

This section explains how you can retrieve items that are controlled by lots, serial numbers, or lots and serial numbers:

- If your items are controlled by only lots, use the attributes from the Lot folder in your report or analysis.
- If your items are controlled by only serial numbers, use the attributes from the Serial Number folder in your report or analysis.
- If your items are controlled by both lots and serial numbers, use the attributes from the Lot and Serial Number folder in your report or analysis.

## Retrieving Items Controlled by Lots, Serial Numbers, and Lots and Serial Numbers

This section explains how you can retrieve items when some of them are controlled by lots, some by serial numbers, and the remaining by lots and serial numbers. In this situation, your report or analysis would contain the Lot, Lot and Serial Number, and Serial Number folders.

To retrieve items by lot numbers, use the following statement:

```
case when (" - Inventory"."Item Lot Control" <> 'No lot control' and " - Inventory"."Item Serial Number Control" <> 'No serial number control') then null else "Lot"."Lot Number" end
```

**Note:** In the previous statement, for the Lot Number logical column, the presentation column is Lot.

To retrieve items by serial numbers, use the following statement:

```
case when (" - Inventory"."Item Lot Control" <> 'No lot control' and " - Inventory"."Item Serial Number Control" <> 'No serial number control') then null else "Serial Number"."Serial Number" end
```

## How can I improve the performance of reports and analyses that are based on the Product Management - Structures and Components Real Time subject area?

In reports and analyses that are based on the Product Management - Structures and Components Real Time subject area, to improve the performance when they return the exploded view of a bill of material (BOM) or include Component Assembly Attributes > Reference Designator >

- Add the following:

```
SET VARIABLE PREFERRED_CURRENCY='User Preferred Currency 1',
DISABLE_CACHE_HIT=1,
OBIS_ORACLEDB_HINTS_FOR_TOP_SELECT='OPT_PARAM('_push_join_predicate','false')
OPT_PARAM('_optimizer_push_pred_cost_based','false')
OPT_PARAM('_complex_view_merging','false');
```

- Add this filter:

```
("Structure Quick Preview"."Component AML Pending Revision Flag" = 'N')
```

- Use the `UPPER()` function with the filter on the item name.

## How can I remove blank rows from analyses and reports that are based on the Product Management - Change Order Approvals Real Time subject area?

To remove blank rows from reports and analyses that are based on the Product Management - Change Order Approvals Real Time subject area, and use approver-related columns, add these filters to the code:

```
("Change Order Approval Details"."Optional Approver Flag" <> 'B')  
AND ("Change Order Approval Details"."Assignee Type Flag" <> 'Y')  
AND ("Change Order Approval Details"."Route Step Line Stage Flag" <> 'Y')
```

These are the details of the columns that are used in the filters:

- **Optional Approver Flag:** This column returns Y when the user is an optional approver and N when the user is the approver. Enter B in this column to remove blank rows.
- **Assignee Type Flag:** This column returns Y when the approver is assigned through a role to the workflow step and N when the approver is an individual user.
- **Route Step Line Stage Flag:** This column is meant for filtering the rows as previously explained.

## How can I remove blank rows from reports and analyses that are based on the Product Management - New Item Request Approvals Real Time subject area?

To remove blank rows from reports and analyses that are based on the Product Management - New Item Request Approvals Real Time subject area and use approver-related columns, add these filters to the code:

```
("New Item Request Approval Details"."Optional Approver Flag" <> 'B')  
AND ("New Item Request Approval Details"."Assignee Type Flag" <> 'Y')  
AND ("New Item Request Approval Details"."Route Step Line Stage Flag" <> 'Y')
```

These are the details of the columns that are used in the filters:

- **Optional Approver Flag:** This column returns Y when the user is an optional approver and N when the user is the approver. Enter B in this column to remove blank rows.
- **Assignee Type Flag:** This column returns Y when the approver is assigned through a role to the workflow step and N when the approver is an individual user.
- **Route Step Line Stage Flag:** This column is meant for filtering the rows as previously explained.

## Configure a Column to Provide an Image

### Overview of Providing an Image Through a Column in a Product Management Subject Area

You can attach an image to an item in the Product Information Management or Product Development work area and make the image available through a column of a Product Management subject area.

You can add an image to an item and then view the image in an analysis using the Image column in the Images subfolder of the Item folder in these subject areas:

- Product Management - Change Order Line Real Time
- Product Management - Components Real Time
- Product Management - Cross Reference Item Real Time
- Product Management - Item Revisions Real Time
- Product Management - Item Supplier Uploads Real Time
- Product Management - New Item Request Line Real Time
- Product Management - Related Item Real Time
- Product Management - Source System Item Real Time
- Product Management - Structures Real Time
- Product Management - Trading Partner Item Real Time

You can attach an image as an item attachment to an item and then view the image in an analysis using the File column in the Item Attachments folder in these subject areas:

- Product Management - Item Revisions Real Time
- Product Management - Source System Item Real Time
- Product Management - Structures and Components Real Time

You can attach an image as an item attachment to an item revision and then view the image in an analysis using the File column in the Revision Attachments folder in these subject areas:

- Product Management - Item Revisions Real Time
- Product Management - Structures and Components Real Time

To provide the image through a subject area column, you must do the following:

1. Configure the EGP\_UCM\_URL profile option code.
2. Add the image to an item or attach the image as an item attachment to an item or item revision.
3. Configure the subject area column through which you want to provide the image.

**Note:** You need the Attachments Administrator role membership to view and download the image through the column in an analysis.

### Related Topics

- [Configure the EGP\\_UCM\\_URL Profile Option Code](#)
- [Add an Image to an Item](#)
- [Provide an Image as an Attachment to an Item](#)
- [Provide an Image as an Attachment to an Item Revision](#)
- [Configure a Column to Provide an Image](#)

## Configure the EGP\_UCM\_URL Profile Option Code

To construct the complete link to an image that you provide through a column of a Product Management subject area, you must configure the EGP\_UCM\_URL profile option code.

1. In the Setup and Maintenance work area, on the Tasks panel tab, select **Search**.  
The Search page opens.
2. Search for the Manage Advanced Item Profile Options task, and click it.  
The Manage Advanced Item Profile Options page opens.
3. Click the EGP\_UCM\_URL profile option code.  
The profile values for the profile option code are displayed.
4. For the site-level profile, in **Profile Value**, enter the URL of the Oracle WebCenter Content server.
5. Click **Save and Close**.

### Related Topics

- [Overview of Providing an Image Through a Column in a Product Management Subject Area](#)
- [Add an Image to an Item](#)
- [Provide an Image as an Attachment to an Item](#)
- [Provide an Image as an Attachment to an Item Revision](#)
- [Configure a Column to Provide an Image](#)

## Add an Image to an Item

You can add an image to an item and view the image in an analysis using a column of a Product Management subject area.

If you add the image to the item, you can view the image later in an analysis using the Image column in the Images subfolder of the Item folder in these subject areas:

- Product Management - Change Order Line Real Time
- Product Management - Components Real Time
- Product Management - Cross Reference Item Real Time
- Product Management - Item Revisions Real Time
- Product Management - Item Supplier Uploads Real Time
- Product Management - New Item Request Line Real Time
- Product Management - Related Item Real Time
- Product Management - Source System Item Real Time
- Product Management - Structures Real Time

- Product Management - Trading Partner Item Real Time
1. In the Product Information Management work area, on the Tasks panel tab, select **Manage Items**.  
The Manage Items page appears.
  2. Search for the item to which you want to add the image.
  3. Click the item.  
The tabs for editing the item appear.
  4. Under the placeholder for the image, click the **Manage Attachments** icon.  
The Attachments dialog box opens.
  5. In the **Type** column, click **File**.
  6. In the **File Name or URL** column, click **Browse** to open the File Upload dialog box, go to the image, select it, and click **Open**.
  7. Optionally, modify the information in the **Title** and **Description** columns.
  8. In the **Shared** column, select the check box.
  9. Click **OK**.
  10. Click **Save**.

#### Related Topics

- [Overview of Providing an Image Through a Column in a Product Management Subject Area](#)
- [Configure the EGP\\_UCM\\_URL Profile Option Code](#)
- [Provide an Image as an Attachment to an Item](#)
- [Provide an Image as an Attachment to an Item Revision](#)
- [Configure a Column to Provide an Image](#)

## Provide an Image as an Attachment to an Item

You can provide an image as an attachment to an item and view the image in an analysis using a column of a Product Management subject area.

If you provide the image as an item attachment to the item, you can view the image later in an analysis using the File column in the Item Attachments folder in these subject areas:

- Product Management - Item Revisions Real Time
  - Product Management - Source System Item Real Time
  - Product Management - Structures and Components Real Time
1. In the Product Information Management work area, on the Tasks panel tab, select **Manage Items**.  
The Manage Items page opens.
  2. Search for the item to which you want to attach the image as an item attachment.
  3. Click the item.  
The tabs for editing the item appear.
  4. On the Attachments tab, on the Item subtab, click the **Add Attachment** icon.  
The Add Attachments pane appears.
  5. In **Type**, select **File**.
  6. In **Category**, select the category that's relevant to your image.
  7. Click **Browse** to open the File Upload dialog box, go to the image, select it, and click **Open**.

8. After the image file has finished uploading, in the row for the image, in the **Actions** column, click the **Details** icon.  
The pane for the image file details appears.
9. Select the **Shared** check box.
10. Click **Update**.
11. Click **Save**.

#### Related Topics

- [Overview of Providing an Image Through a Column in a Product Management Subject Area](#)
- [Configure the EGP\\_UCM\\_URL Profile Option Code](#)
- [Add an Image to an Item](#)
- [Provide an Image as an Attachment to an Item Revision](#)
- [Configure a Column to Provide an Image](#)

## Provide an Image as an Attachment to an Item Revision

You can provide an image as an attachment to an item revision and view the image in an analysis using a column of a Product Management subject area.

If you provide the image as an item attachment to the item revision, you can view the image later in an analysis using the File column in the Revision Attachments folder in these subject areas:

- Product Management - Item Revisions Real Time
- Product Management - Structures and Components Real Time

The steps you must follow for providing the image as an item attachment to the item revision are different for each subject area.

1. If you want to use the File column in the Product Management - Item Revisions Real Time subject area, follow these steps:
  - a. In the Product Information Management work area, on the Tasks panel tab, select **Manage Items**.  
The Manage Items page opens.
  - b. Search for the item to which you want to attach the image as an item attachment to an item revision.
  - c. Click the item.  
The tabs for editing the item appear.
  - d. On the Attachments tab, on the Item Revision subtab, click the **Add Attachment** icon.  
The Add Attachments pane appears.
  - e. In **Type**, select **File**.
  - f. In **Category**, select the category that's relevant to your image.
  - g. Click **Browse** to open the File Upload dialog box, go to the image, select it, and click **Open**.
  - h. After the image file has finished uploading, in the row for the image, in the **Actions** column, click the **Details** icon.  
The pane for the image file details appears.
  - i. Select the **Shared** check box.
  - j. Click **Update**.
  - k. Click **Save**.



2. If you want to use the File column in the Product Management - Structures and Components Real Time subject area, follow these steps:
  - a. In the Product Development work area, on the Tasks panel tab, select **Manage Items**.  
The Manage Items page opens.
  - b. Search for the item to which you want to attach the image as an item attachment to an item revision.
  - c. Click the item.  
The tabs for editing the item appear.
  - d. On the Attachments tab, click the **Add Attachment** icon.  
The Add Attachments pane appears.
  - e. In **Type**, select **File**.
  - f. In **Category**, select the category that's relevant to your image.
  - g. Click **Browse** to open the File Upload dialog box, go to the image, select it, and click **Open**.
  - h. After the image file has finished uploading, in the row for the image, in the **Actions** column, click the **Details** icon.  
The pane for the image file details appears.
  - i. Select the **Shared** check box.
  - j. Click **Update**.
  - k. Click **Save and Close**.
  - l. In the Scheduled Processes work area, run the **Expand Structure for Business Intelligence** process for the item and its organizations.

#### Related Topics

- [Overview of Providing an Image Through a Column in a Product Management Subject Area](#)
- [Configure the EGP\\_UCM\\_URL Profile Option Code](#)
- [Add an Image to an Item](#)
- [Provide an Image as an Attachment to an Item](#)
- [Configure a Column to Provide an Image](#)

## Configure a Column to Provide an Image

You must configure the Image or File column in a Product Management subject area to display the image that you added or attached to an item or item revision.

1. In the Reports and Analytics work area, click the **Browse Catalog** button.  
The Oracle Transactional Business Intelligence Catalog opens.
2. In the Folders pane, go to the folder that contains the analysis for which you want to configure the Image or File column.

**Note:** Whether you must configure the Image or File column and the subject area that contains the column depend on whether you added an image to an item or attached the image as an item attachment to an item or item revision.

3. Edit the analysis.
4. Click the Criteria tab.
5. In the Selected Columns pane, select **Column Properties** in the drop-down list for the Image or File column.  
The Column Properties dialog box opens.
6. Click the Data Format tab.

7. Select the **Override Default Data Format** check box.
8. In **Treat Text As**, do one of the following:
  - If you're modifying the Image column, select **Image URL**.
  - If you're modifying the File column, select **HyperText link**.
9. Click **OK**.
10. Save your changes.

When you run your analysis, you can use the configured column to view the image.

**Note:** You need the Attachments Administrator role membership to view and download the image through the column in an analysis.

#### Related Topics

- [Overview of Providing an Image Through a Column in a Product Management Subject Area](#)
- [Configure the EGP\\_UCM\\_URL Profile Option Code](#)
- [Add an Image to an Item](#)
- [Provide an Image as an Attachment to an Item](#)
- [Provide an Image as an Attachment to an Item Revision](#)

## Configure the Template for the Item Structure Report

### Overview of Configuring the Template for the Item Structure Report with Attributes

You can make a copy of the template for the item structure report and configure the copy with additional attributes or the Main and AML attribute in the Product Development or Product Information Management work area.

To make a copy of the template and configure it, you must do the following:

1. Download the template for the item structure report.
2. Configure the template with additional attributes or the Main and AML attribute.

**Note:** For the template with the Main and AML attribute, you must choose the attributes you want in the report.

3. Upload the configured template for the item structure report.
4. Verify the changes to the template that's configured with additional attributes or the Main and AML attribute.

**Note:** Oracle recommends the use of Mozilla Firefox when a browser is required for these procedures.

#### Related Topics

- [Download the Template for the Item Structure Report](#)
- [Configure the Template for the Item Structure Report with Additional Attributes](#)
- [Configure the Template for the Item Structure Report with the Main and AML Attribute](#)
- [Upload the Configured Template for the Item Structure Report](#)
- [Verify the Configured Template for the Item Structure Report](#)

## Download the Template for the Item Structure Report

You must download the template for the item structure report so that you can make a copy of the template and configure it with additional attributes or the Main and AML attribute.

### Before you start

For detailed information about downloading templates, refer to the documentation for the Oracle Analytics Publisher.

### Here's what to do

1. In the Oracle Transactional Business Intelligence Catalog, expand **Shared Folders > Supply Chain Management > Product Management > Items > Structures**.
2. Click **Edit** for the Item Structure Report.  
The Item Structure Report page opens.
3. Click **Edit** for the Default Item Structure Report.  
A dialog box opens with options to save the `DefaultItemStructureReportTemplate.rtf` file.
4. Save the file as `UserDefined_ItemStructure.rtf`.

**Note:** You can save the file with any name that you choose.

### Related Topics

- [Overview of Configuring the Template for the Item Structure Report with Attributes](#)
- [Configure the Template for the Item Structure Report with Additional Attributes](#)
- [Configure the Template for the Item Structure Report with the Main and AML Attribute](#)
- [Upload the Configured Template for the Item Structure Report](#)
- [Verify the Configured Template for the Item Structure Report](#)

## Configure the Template for the Item Structure Report with Additional Attributes

You can configure the template for the item structure report with additional attributes by following the procedure in this topic.

### Before you start

Ensure that the BI Publisher plug-in is enabled in Microsoft Word.

### Here's what to do

1. In the Oracle Transactional Business Intelligence Catalog, expand **Shared Folders > Supply Chain Management > Product Management > Items > Structures > Data Models**.
2. Click **Edit** for the Item Structure Report Data Model.  
The Item Structure Report Data Model page appears.
3. In the Data Model pane, click **Properties**.  
The properties for the data model are displayed.
4. In the Attachment section, in the **Sample Data** field, click **sample.xml**.  
A dialog box appears with options to save the `sample.xml` file.
5. Select the location where the `sample.xml` file must be saved, and click **Save**.
6. In Microsoft Word, open `UserDefined_ItemStructure.rtf`.

7. On the BI Publisher tab, click **Sample XML**.  
 A dialog box opens.
8. Go to the `sample.xml` file, select it, and click **Open**.
9. In the confirmation dialog box that appears, click **OK**.
10. Insert the header and data fields, and change the default/displayed text for the fields as required.
11. In the fields, insert the values displayed in this table:

Header Field	Data Field
@effLabel	ITEM_EFF
@label	AML_DFF
@label	MPN_DFF
@label	COMPONENT_DFF

12. Set the properties for the header and data fields for each attribute type on the Advanced tab in the BI Publisher Properties dialog box.

Attribute Type	BI Publisher Property for Header Field	BI Publisher Property for Data Field
AML Descriptive Flexfield	<code>&lt;?split-column-header:AML_DFF_ATTR?&gt; &gt; &lt;?split-column-width-unit:5?&gt; &lt;?split-column-width:10?&gt; &lt;?@Label?&gt;</code>	<code>&lt;?split-column-data:AML_DFF_ATTR?&gt; &lt;?AML_DFF?&gt; &lt;?end?&gt;</code>
Component Descriptive Flexfield	<code>&lt;?split-column-header:COMPONENT_DFF_ATTR?&gt; &lt;?split-column-width-unit:5?&gt; &lt;?split-column-width:10?&gt; &lt;?@Label?&gt;</code>	<code>&lt;?split-column-data:COMPONENT_DFF_ATTR?&gt; &lt;?COMPONENT_DFF?&gt; &lt;?end?&gt;</code>
Item Extensible Flexfield	<code>&lt;?split-column-header:ITEM_EFF_ATTR?&gt; &lt;?split-column-width-unit:5?&gt; &lt;?split-column-width:10?&gt; &lt;?@effLabel?&gt;</code>	<code>&lt;?split-column-data:ITEM_EFF_ATTR?&gt; &lt;?ITEM_EFF?&gt; &lt;?end?&gt;</code>
MPN Descriptive Flexfield	<code>&lt;?split-column-header:MPN_DFF_ATTR?&gt; &gt; &lt;?split-column-width-unit:5?&gt; &lt;?split-column-width:10?&gt; &lt;?@Label?&gt;</code>	<code>&lt;?split-column-data:MPN_DFF_ATTR?&gt; &lt;?MPN_DFF?&gt; &lt;?end?&gt;</code>

13. Save the `UserDefined_ItemStructure.rtf` file.

**Note:** Ensure that the `UserDefined_ItemStructure.rtf` file is backed up to the Custom folder because modified templates are deleted after upgrades and must be manually copied from the Custom folder after upgrades.

### Related Topics

- [Overview of Configuring the Template for the Item Structure Report with Attributes](#)
- [Download the Template for the Item Structure Report](#)
- [Configure the Template for the Item Structure Report with the Main and AML Attribute](#)
- [Upload the Configured Template for the Item Structure Report](#)
- [Verify the Configured Template for the Item Structure Report](#)

## Configure the Template for the Item Structure Report with the Main and AML Attribute

You can configure the template for the item structure report with the Main and AML attribute by following the procedure in this topic.

If your template for the item structure report must have the Main and AML attribute, you must configure the template with the approved manufacturer list (AML) and manufacturer part number (MPN) descriptive flexfield attributes.

### Before you start

Ensure that the BI Publisher plug-in is enabled in Microsoft Word.

### Here's what to do

1. In the Oracle Transactional Business Intelligence Catalog, expand **Shared Folders > Supply Chain Management > Product Management > Items > Structures > Data Models**.
2. Click **Edit** for the Item Structure Report Data Model.  
The Item Structure Report Data Model page appears.
3. In the Data Model pane, click **Properties**.  
The properties for the data model are displayed.
4. In the Attachment section, in the **Sample Data** field, click **sample.xml**.  
A dialog box appears with options to save the `sample.xml` file.
5. Select the location where the `sample.xml` file must be saved, and click **Save**.
6. Update the `sample.xml` file with attribute data under the `<PublisherAMLVORow>` tag.  
For example, if you're adding an MPN descriptive flexfield attribute called MPN Condition, here's how it should display:  

```
<PublisherAMLVORow>  
  
<MPN Condition>Value of MPN Condition</MPN Condition>
```
7. In Microsoft Word, open `UserDefined_ItemStructure.rtf`.
8. On the BI Publisher tab, click **Sample XML**.  
A dialog box opens.
9. Go to the `sample.xml` file, select it, and click **Open**.
10. In the confirmation dialog box that appears, click **OK**.

11. Set the properties for the header and data fields for each attribute type on the Advanced tab in the BI Publisher Properties dialog box.

Attribute Type	BI Publisher Property for Header Field	BI Publisher Property for Data Field
AML Descriptive Flexfield or MPN Descriptive Flexfield	<user-defined display value of descriptive flexfield attribute>	<user-defined code of descriptive flexfield attribute>

12. Save the `UserDefined_ItemStructure.rtf` file.

**Note:** Ensure that the `UserDefined_ItemStructure.rtf` file is backed up to the Custom folder because modified templates are deleted after upgrades and must be manually copied from the Custom folder after upgrades.

### Related Topics

- [Overview of Configuring the Template for the Item Structure Report with Attributes](#)
- [Download the Template for the Item Structure Report](#)
- [Configure the Template for the Item Structure Report with Additional Attributes](#)
- [Upload the Configured Template for the Item Structure Report](#)
- [Verify the Configured Template for the Item Structure Report](#)

## Upload the Configured Template for the Item Structure Report

After you configure the template for the item structure report with additional attributes or the Main and AML attribute, you must upload the template.

### Before you start

For detailed information about uploading templates, refer to the documentation for the Oracle Analytics Publisher.

### Here's what to do

1. In the Oracle Transactional Business Intelligence Catalog, expand **Shared Folders > Supply Chain Management > Product Management > Items > Structures**.
2. In the drop-down list for the Item Structure Report, click **Customize**.  
 A copy of the Item Structure Report is created in Shared Folders > Custom > Supply Chain Management > Product Management > Items > Structures.
3. Click **Add New Layout**.  
 The options for creating a layout and uploading or generating a layout appear.
4. In the Upload or Generate Layout section, click the **Upload** icon.  
 The Upload Template File dialog box opens.
5. In **Layout Name**, enter a name of your choice.
6. Click **Browse** to open the File Upload dialog box, go to the `UserDefined_ItemStructure.rtf` file, select it, and click **Open**.
7. In **Type**, select **RTF Template**.
8. In **Locale**, select **English**.
9. Click **Upload**.  
 Your changes are reflected in the Item Structure Report that's saved in Shared Folders > Custom > Supply Chain Management > Product Management > Items > Structures.

### Related Topics

- [Overview of Configuring the Template for the Item Structure Report with Attributes](#)
- [Download the Template for the Item Structure Report](#)
- [Configure the Template for the Item Structure Report with Additional Attributes](#)
- [Configure the Template for the Item Structure Report with the Main and AML Attribute](#)
- [Verify the Configured Template for the Item Structure Report](#)

## Verify the Configured Template for the Item Structure Report

After you upload the configured template for the item structure report with additional attributes or the Main and AML attribute, you can verify your changes.

### Before you start

Ensure that you have the privileges for generating the item structure report.

### Here's what to do

1. In the Product Development or Product Information Management work area, on the Tasks panel tab, in Items, select **Manage Items**.  
The Manage Items page appears.
2. Search for an item that preferably has data for the `UserDefined_ItemStructure.rtf` file, and open the item.
3. Click **Actions > Generate Report > Item Structure Report**.  
The Item Structure Report dialog box opens.
4. In **Levels**, select **Single** to generate the report for a single level or **All** to generate the report for all levels.
5. In **Columns**, do one of the following:
  - If you configured the template with additional attributes, select **All**.
  - If you configured the template with the Main and AML attribute, select **Main and AML**.
6. In **Templates**, select the layout name that you provided while uploading the `UserDefined_ItemStructure.rtf` file.
7. In **Format**, select **Microsoft Excel Workbook File**.
8. Click **Submit**.  
A process ID is generated and displayed in a confirmation message.
9. Copy the process ID.
10. Click **OK**.
11. If you're in the Product Development work area, perform these steps:
  - a. On the Tasks panel tab, in Scheduled Processes, select **View Scheduled Processes**.  
The View Scheduled Processes tab opens.
  - b. When the value in the **Status** column for the submitted process is Succeeded, in the **View Output** column, click the **Output** icon.  
The Generate Structure Report dialog box opens.
  - c. Click the link to display more files.  
The Attachments dialog box opens.
  - d. In the **File Name or URL** column, click the structure report.  
A dialog box opens for saving the file.
  - e. Specify the location and name for the saved file, and click **Save**.

12. If you're in the Product Information Management work area, perform these steps:
  - a. Go to the Scheduled Processes work area.
  - b. In the Search section, search for the copied process ID.
  - c. When the value in the **Status** column for the submitted process is Succeeded, click the process.
  - d. On the Process Details tab, click the link to display more files.  
The Attachments dialog box opens.
  - e. In the **File Name or URL** column, click the structure report.  
A dialog box opens for saving the file.
  - f. Specify the location and name for the saved file, and click **Save**.
13. Verify that the file reflects your changes to the configured template for the item structure report with additional attributes or the Main and AML attribute.

#### *Related Topics*

- [Overview of Configuring the Template for the Item Structure Report with Attributes](#)
- [Download the Template for the Item Structure Report](#)
- [Configure the Template for the Item Structure Report with Additional Attributes](#)
- [Configure the Template for the Item Structure Report with the Main and AML Attribute](#)
- [Upload the Configured Template for the Item Structure Report](#)



# 6 Infolets

## Overview of Infolets

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

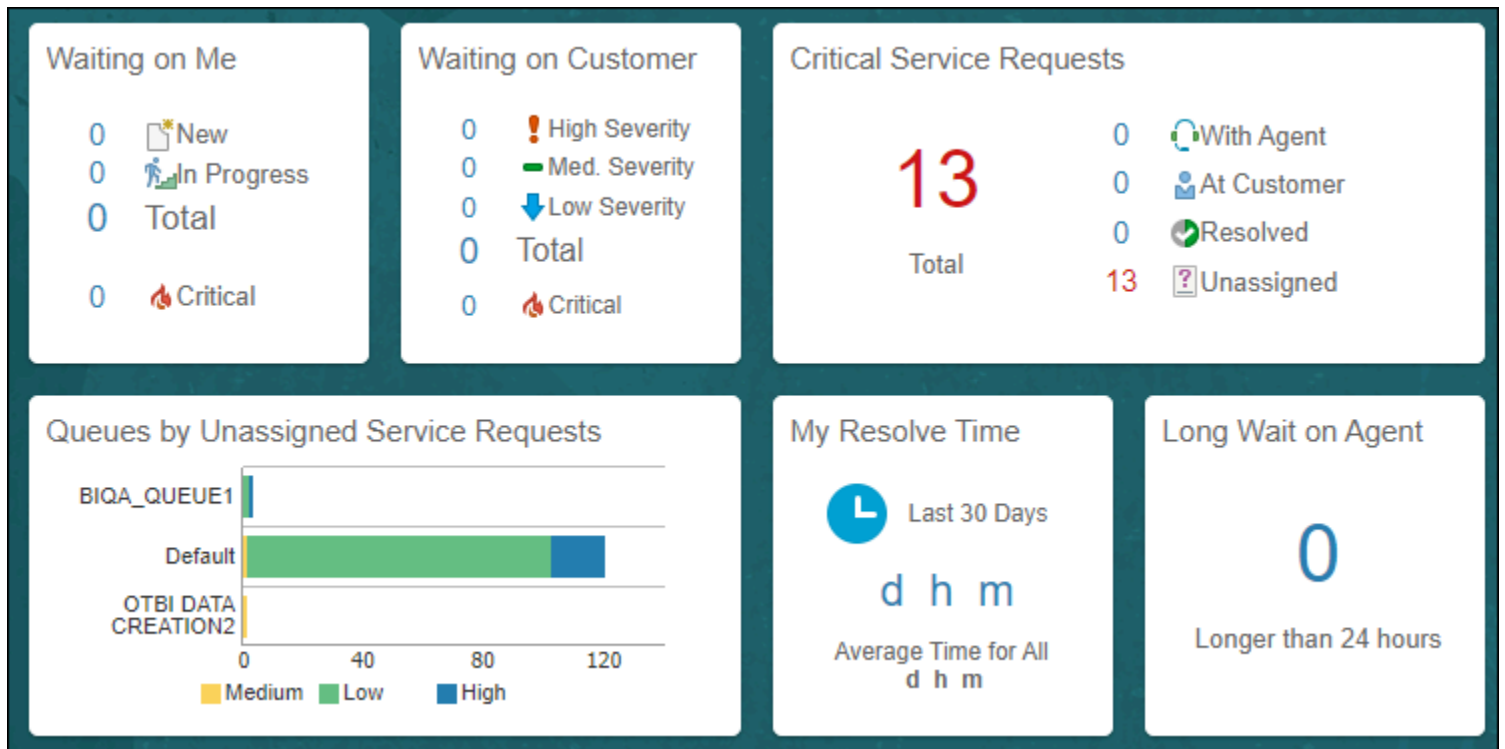
You can use infolets arranged in tabs in the Analytics section of your home page. If you're using a panel or banner layout, use the page control icons to use the infolets.

Here are a few things to know about infolets.

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

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

Here's how an infolet page looks.



## Personalize Infolets

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

### Edit Infolet Titles and Views

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

### Reorder Infolets

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

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

## Hide or Show Infolets

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

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

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

### Related Topics

- [Configure Infolet Display](#)

## Configure Infolets

### Overview of Configuring Infolets

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

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

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

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

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

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

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

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

### Related Topics

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

## Create Infolets



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

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

**Note:** If you can't find the **Create Infolet** menu item, it means you can't create infolets for this page.

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

## Add Content to Infolets

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

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

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

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

## Link Detailed Reports to Infolets

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

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

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

## Publish the Sandbox

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

### Related Topics

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

## Edit and Delete Infolets

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

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

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

## Edit Infolet Content

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

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

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

## Edit Title and Views

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

## Edit or Remove Detailed Report

You can edit or remove the detailed report.

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

## Edit Infolet Visibility

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

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

## Delete Infolets

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

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

### Related Topics

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

## Examples of EL Expressions

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

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

## Scenario

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

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

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

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

### Related Topics

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

## FAQs for Infolets

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

That's probably because the infolet page is hidden.

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

*Related Topics*

- [Configure Infolet Display](#)

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

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

*Related Topics*

- [Configure Infolet Display](#)

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

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

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

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# 7 Workflow Notifications

## Overview of Configurable Email Notifications in SCM

As part of workflow tasks and based on the notification mode in BPM Worklist, the application automatically sends notifications to your users.

For example, when someone submits a new item request for approval, the approver receives an email notification with approval request. In the new item request workflow, you can use Oracle Analytics Publisher to configure the content, layout, and style of the notifications.

The table shows the Supply Chain Management product that uses configurable email notifications, along with their associated features, and workflow task names.

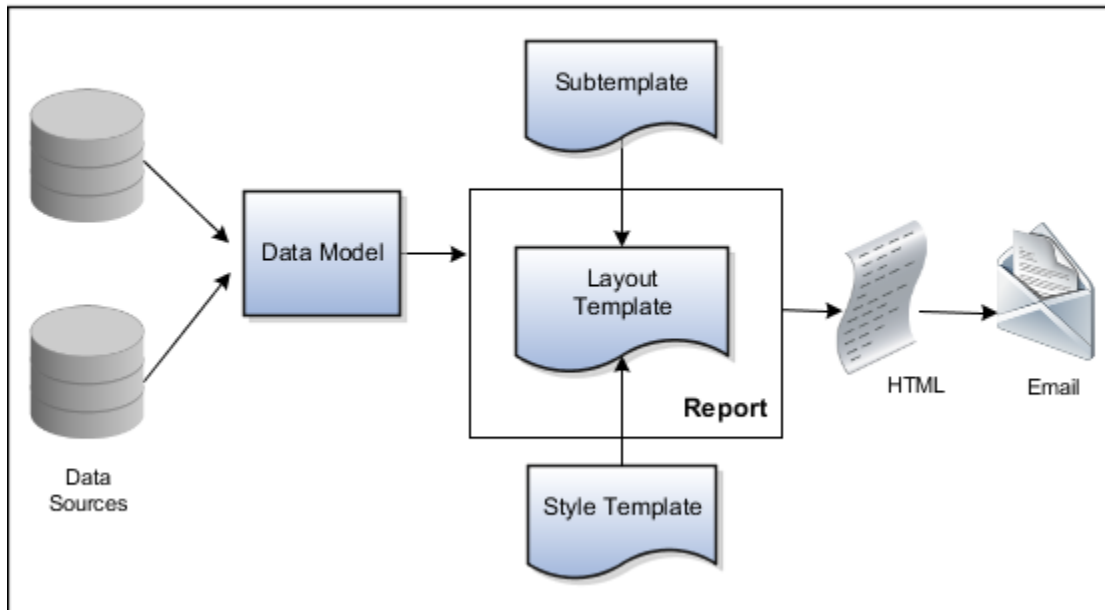
Product	Feature Name	Report or Notification Name	Workflow Task Name
Product Hub	New Item Request	New Item Request Approval	NewItemRequestApprovalTask

**Note:** When you receive a workflow email notification, you can alternatively find the same notification by opening the Worklist: Notifications and Approvals work area or bell notification.

### Process Overview

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

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



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

Each workflow task with configurable email notifications has a corresponding predefined report in the BI catalog.

## Email Modifications

After you enable configurable email notifications, the predefined reports and related objects in the BI catalog work by default. The report-based notifications provide the same information as the standard notifications, but in a format optimized for mobile devices. If you need to modify the emails, you can edit copies of the predefined reports, data models, and subtemplate (but not the style template).

## Security

To configure reports and data models for email notifications, you must have the Application Developer and the BI Administrator job role.

**Note:** Oracle recommends that security administrators don't assign these predefined roles directly to users. Instead, make a copy of a predefined role, remove the privileges that your users don't need, and assign users the role that contains only the privileges they need.

## Setup

You must download and install the Template Builder for Word add-in.

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

## Reflect Changes from Edited Reports Sooner

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

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

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

## Create Profile Options to Control the Refresh

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

Scope	Profile Option Code	Examples
Global	BIP_CLIENT_REFRESH_TIME	BIP_CLIENT_REFRESH_TIME
Product Family	BIP_CLIENT_REFRESH_TIME_<FAMILY>	<ul style="list-style-type: none"> <li>• BIP_CLIENT_REFRESH_TIME_FIN</li> <li>• BIP_CLIENT_REFRESH_TIME_HCM</li> <li>• BIP_CLIENT_REFRESH_TIME_PRC</li> <li>• BIP_CLIENT_REFRESH_TIME_PRJ</li> <li>• BIP_CLIENT_REFRESH_TIME_SCM</li> </ul>

Scope	Profile Option Code	Examples
Product	BIP_CLIENT_REFRESH_TIME_<FAMILY>_<PRODUCT>	<ul style="list-style-type: none"> <li>BIP_CLIENT_REFRESH_TIME_FIN_AP</li> <li>BIP_CLIENT_REFRESH_TIME_HCM_PER</li> <li>BIP_CLIENT_REFRESH_TIME_PRC_PON</li> <li>BIP_CLIENT_REFRESH_TIME_PRJ_PJE</li> <li>BIP_CLIENT_REFRESH_TIME_SCM_EGO</li> </ul>

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

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

Now you're ready to create your profile options!

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

## Set the Refresh Interval

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

**CAUTION:** Make sure to enter a whole number.

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

#### *Related Topics*

- [Update Existing Setup Data](#)
- [Set Profile Option Values](#)
- [Modules in Application Taxonomy](#)

## Best Practices for Content and Layout in Workflow Notifications

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

### Follow the General Structure

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

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

The screenshot displays a 'Task Approval' notification interface. At the top, the task title 'Task Approval' is followed by the amount '3,700.00 USD' and the company name 'Vision Corporation'. Below this, it says 'Task Example' and the date '8/29/17'. A callout '2' points to this header section.

Below the header is a navigation bar with three buttons: 'Approve' (green), 'Reject' (red), and 'Request Information' (blue). A callout '3' points to the 'Request Information' button.

The main content area is titled 'Details'. It shows the sender 'From: Emily Thorne' and the 'Description: Example of a task for approval'. A callout '4' points to this details section.

Below the details is a 'Task Information' section containing a table:

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

Below the table is an 'Approvals' section showing a timeline of actions:

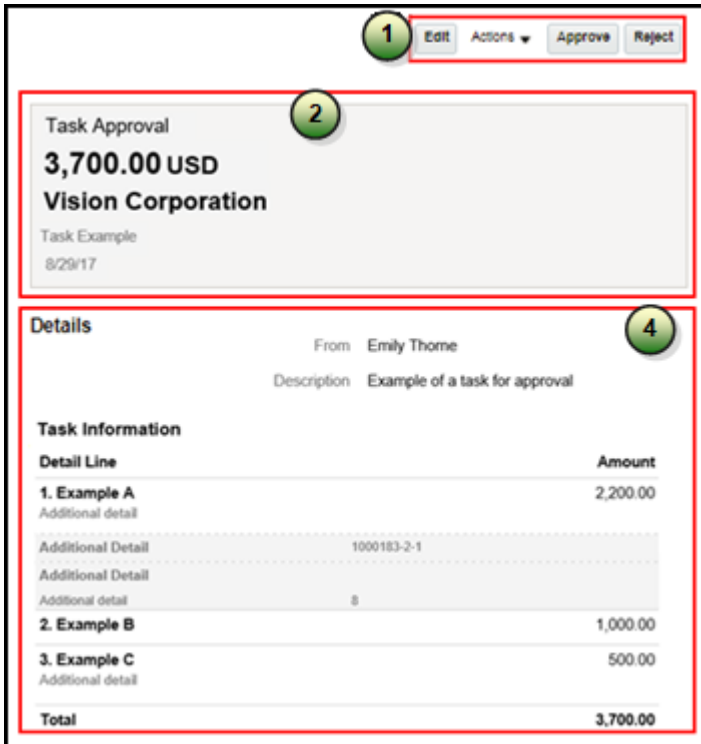
- Assigned to **Mateo Lopez** (8/29/17 7:40 AM)
- Submitted by **Emily Thorne** (8/29/17 7:40 AM)

A callout '5' points to the 'Assigned to' action.

At the bottom of the notification, there is another navigation bar with 'Approve', 'Reject', and 'Request Information' buttons. A callout '6' points to the 'Request Information' button.

At the very bottom, there are two links: 'Transaction Details' and 'In-App Notification'. A callout '7' points to the 'Transaction Details' link.

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



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

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

## Keep Mobile in Mind

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

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

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

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

### Related Topics

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

## Configure Email Notification Template

You can configure an email notification template using the Oracle Analytics Publisher Desktop Add-in for Microsoft Word for the following objects: change orders, change requests, problem reports, corrective actions, new item requests, proposals, and requirements.

You can view the object-specific labels for change requests, problem reports and corrective actions in the Change Order Approval Worklist and Email Notification Report template available in the Oracle Analytics Publisher. You can then set the configured template as the default template for all future approval notifications.

You can also configure approval notifications to add descriptive flexfields in the **Additional Information** section and view the impacted products for the engineering change orders, non-revision control change orders, problem reports, and corrective actions. Configure notifications templates to view the attributes in the following notifications:

- Change Order Approval Worklist and Email Notification Report



- Change Order Reviewer Notification Report.

To view the configured descriptive flexfields in the additional information section, set **isAdditionalInformationEnabled** to true in the template.

Change request and commercial change order approval notifications won't display Impacted Products section.

**Note:**

- Before modifying the template, it's recommended that you familiarize yourself with Oracle Analytics Publisher. Also review the My Oracle Support (MOS) topic, Configurable Email Notifications: Implementation Considerations (Doc ID 2215570.1).
- Any user assigned with any of these predefined job roles can configure the notification template:
  - BI Author Role (BIAuthor)
  - BI Publisher Data Model Developer (BIPDataModelDeveloper)

Oracle recommends that security administrators don't assign these predefined roles directly to users. Instead, make a copy of a predefined role, remove the privileges that your users don't need, and assign users the role that contains only the privileges they need.

- Ensure that your users are assigned the role

**EGO\_GENERATE\_ITEM\_CHANGE\_ORDER\_REPORT\_PRIV\_OBI.**

This role provides access to the following:

- New Item Request Approval Email Notification Report
  - Change Order Approval Worklist and Email Notification Report
  - Change Order Reviewer Notification Report
- Edit a copy of predefined layout templates, rather than creating reports or layout templates from scratch.
  - To edit the template, it's recommended that you use the add-in for Microsoft Word.
  - Modified templates are refreshed every 24 hours by default after you upload them to the BI catalog. To reflect changes sooner, you can change the profile value setting as described in **Set Report Template Refresh Interval**.

## Create Profile Options to Control the Refresh Interval

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

## Set Report Template Refresh Interval

In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.

1. Search for the BIP\_CLIENT\_REFRESH\_TIME profile option and select it.
2. Click the **Create** icon.
3. In the row that appears, select **Site** as the Profile Level. Then, enter a time interval of your choice (for example, 15) as the profile value.
4. Click **Save and Close**.

## Install Oracle Analytics Publisher Desktop Add-In for Microsoft Word

1. Download Oracle Analytics Publisher Desktop from the following location: <https://www.oracle.com/middleware/technologies/analytics-publisher/downloads.html>
2. Install the latest version of the software for your operating system.
3. After you install the latest version, the add-in appears as the **Publisher** ribbon tab when you open Microsoft Word.

## Download the Sample.xml File

1. Navigate to Reports and Analytics (Navigator > Tools > Reports and Analytics) and click **Browse Catalog**.
2. Navigate to the data model folder for the business object using the path listed in the Table 1 - Folder Path for Data Models.
3. Select the data model that you want and click **Edit**.
4. In the Data Model pane, click **Properties**.
5. In the Attachment section of the page that appears, click the file name, **sample.xml**, in the Sample Data field. The file downloads automatically.

## Create and Publish a New Template

### Download and Modify a Copy of the Original Template.

1. Click **Catalog**.
  - a. To download and modify the template, navigate to the template using the path listed in Table 2 - Folder Path for Templates.
  - b. Click **Edit**.

- c. Click **Edit** on the new page. Save a copy of the report (.rtf).
- d. Open the (.rtf) report in Microsoft Word.
- e. Click **Publisher > Sample XML** to begin uploading the sample.xml file.
- f. After the upload is complete, all the Oracle Analytics Publisher options are enabled to configure the template. When you click the **Field** icon, you see change order-related fields from the data model, including trading partner reference attributes such as Customer, Supplier, Manufacturer, and Source. You drag and drop or move the required fields to modify the template. You can configure conditional rendering of these attributes and attribute values. For details, see the support note: Doc ID 2920067.1 on My Oracle Support.
- g. Save the template.

**Upload the New Template.**

1. Change to Oracle Analytics Publisher by replacing everything after the domain name in your URL with /xmlpserver
2. Click **Catalog**.
3. Ensure that the folder structure and files in Shared Folders/Custom/Supply Chain Management are the same as the ones in Shared Folders/Supply Chain Management, including the folder you need. If not, copy or create the folders you need into the Custom/Supply Chain Management folder.
4. To upload the template, navigate to **Shared Folders/Custom/Supply Chain Management** and locate the relevant report.
5. Click **Edit**.
6. Click **Add New Layout** and click **Upload**. The Upload Template File dialog appears.
  - a. Enter a name for the template and select the template you modified.
  - b. Type: Select RTF
  - c. Locale: Select English
  - d. Click **Upload**.

**Set the New Template as the Default**

1. While still viewing the layouts, click **View a List**.
2. Select the Default Layout check box corresponding to the modified report.
3. Click the **Save** icon.

The following table lists folder paths for data models.

**Folder Path for Data Models**

Business Object	Data Model	Data Model Folder Path
Change Order	Change Order Approval f and Email Notification Data Model	Catalog > Shared Folders > Supply Chain Management > Product Management > Items > Change Orders > Data Models
New Item Request	New Item Request Worklist and Email Notification Data Model	Catalog > Shared Folders > Supply Chain Management > Product Management > Items > New Item Requests > Data Models
Proposal	Proposal Report Data Model	Catalog > Shared Folders > Supply Chain Management > Innovation Management > Concepts > Data Models
Requirement	Requirement Report Data Model	Catalog > Shared Folders > Supply Chain Management > Innovation Management > Concepts > Data Models

The following table lists folder paths for configured templates.

### Folder Path for Configured Templates

Template Name	Folder Path
Change Order Approval Worklist and Email Notification Report	Shared Folders/Custom/Supply Chain Management/Product Management/Items/Change Orders
New Item Request Worklist and Email Notification Report	Shared Folders/Custom/Supply Chain Management/Product Management/Items/New Item Requests
Default Proposal Report	Shared Folders/Custom/Supply Chain Management/Product Management/Innovation Management/Concepts
Default Requirement Report	Shared Folders/Custom/Supply Chain Management/Product Management/Innovation Management/Concepts

#### Related Topics

- [Modify the Notification Template for Change Orders](#)

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

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

Here are some of the shared components in the subtemplate:

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

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

**Note:**

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

## Modify Shared Components in the Subtemplate

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

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

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

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

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

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

## Upload the Modified Subtemplate

Now you upload your subtemplate to the BI catalog:

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

## Point Layout Templates to Your Subtemplate

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

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

### Related Topics

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

## Use Quick Parts for Workflow Notifications

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

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

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

## Prerequisites

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

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

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

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

## Adding Quick Parts Content to Workflow Notifications

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

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

## Previewing the Layout Template Changes

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

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

## Uploading the Modified Layout Template

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

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

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

#### Related Topics

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

## Preview Changes and Upload Layout Templates for Workflow Notifications

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

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

### Before You Start

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

### Preview Output

To generate sample output from a local layout template:

1. Open your .rtf report layout template in Microsoft Word and make your edits.
2. On the ribbon, open the Analytics Publisher tab and click **Sample XML** within the Load Data group.
3. Select the .xml file you downloaded to import sample data from the data model.
4. At the beginning of your .rtf document, replace the path with the location of the downloaded subtemplate file on your computer. For example, change `<?import:xdoxsl:///Common Content/Templates/Workflow Notification Subtemplate.xsb?>` to `<?import:file:///C:/Template_Directory/FinFunWorkflowNotificationSub.rtf?>`.



5. From the Analytics Publisher tab on the ribbon, click **HTML** in the Preview group.
6. If the preview reflects your changes as expected, then change the path back to the original location.
7. From the Analytics Publisher tab on the ribbon, click **Validate Template** in the Tools group.
8. Also in the Tools group, click **Check Accessibility**.
9. Save your changes in Word.

## Upload the Modified Layout Template

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

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

### Related Topics

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

