
Implementing Oracle Business Intelligence System, Release 11*i*

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Glossary

Unit II

BIS Architecture, Alerts, and Workflows

**Unit II Introduction:
BIS Architecture, Alerts,
and Workflows**

Objectives

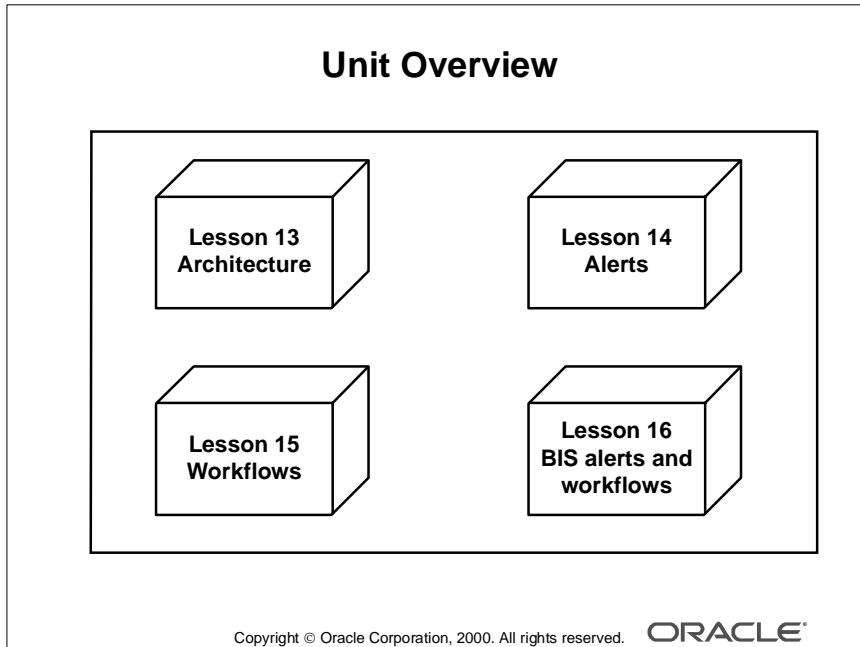
Unit II Objectives

After completing this unit, you should be able to do the following:

- **Describe the BIS architecture**
- **Describe Oracle alerts**
- **Describe Oracle workflows**
- **Examine BIS alerts and workflows**

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Overview

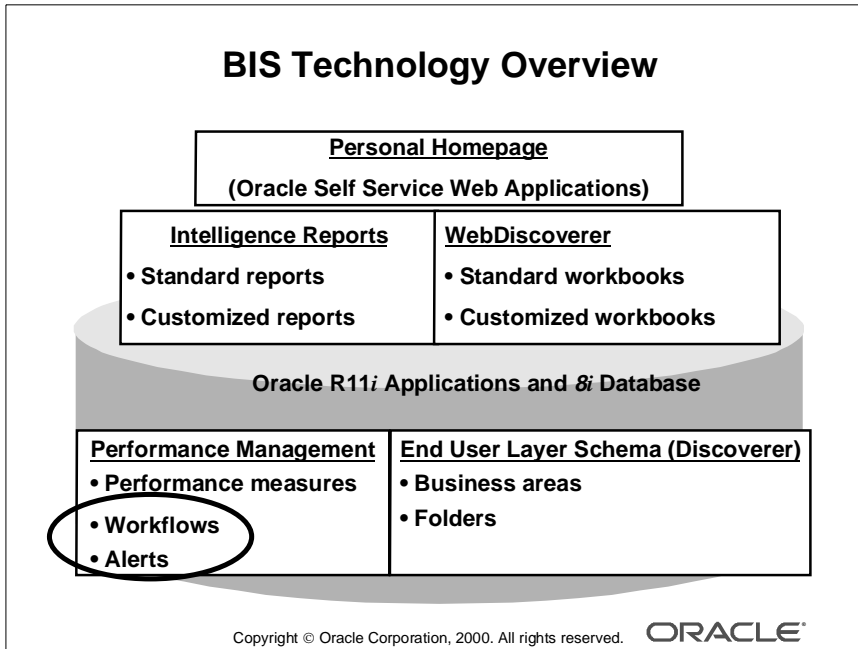


Importance of This Unit

This unit explains the technology in which BIS is installed and also explains how Oracle Alert and Oracle Workflow work within the BIS context.

Lesson 14 includes a detailed description of Oracle's three-tiered architecture in which BIS is installed. Lessons 14 and 15 provide an overview of the Oracle Alert and Workflow products. Lesson 16 explains how Oracle Alert and Workflow support the Performance Management Framework.

Unit Integration



Unit II Integration

This unit explains the underlying technical components that support and house the BIS application. These components represent the servers associated with Oracle Applications, Self service Web Applications, and the database.

This unit also discusses the role of Oracle Workflow and Oracle Alert in performance management.

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Describing BIS Architecture

Objectives

Objectives

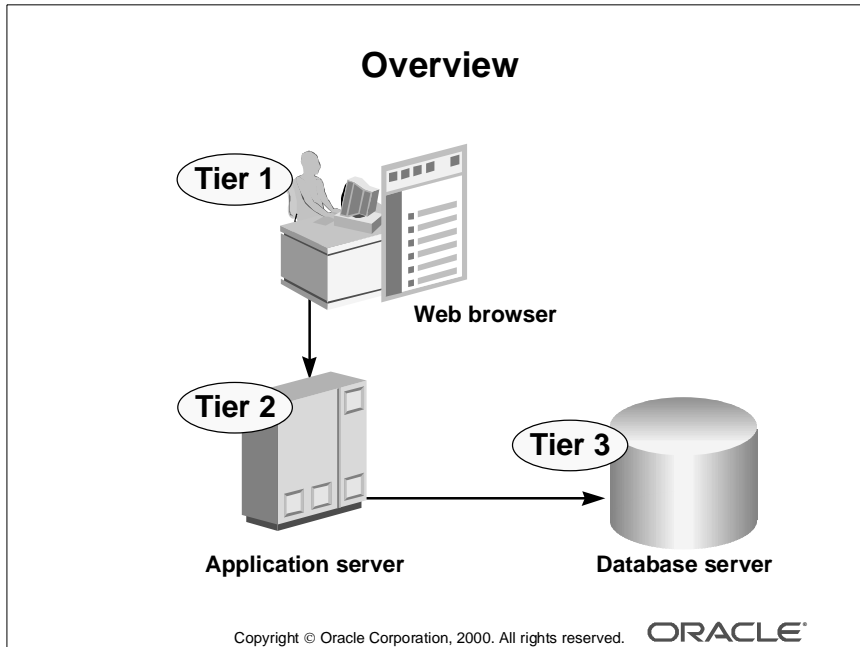
After completing this lesson, you should be able to do the following:

- **Explain the multitier computing model**
- **Describe the BIS technology stack**
- **Explain BIS architecture**
- **Describe BIS product interfaces**

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Overview



Importance of This Lesson

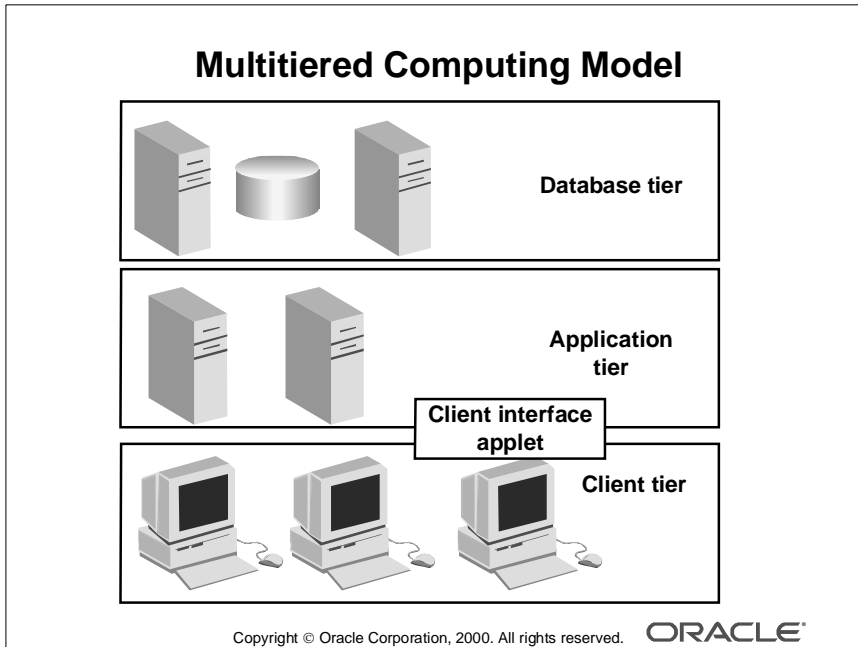
This lesson describes the Oracle three-tiered computing model as well as the BIS architecture, which resides in a three-tiered model. BIS architecture includes the following:

- Client tier (tier 1): Contains only a Web browser
- Application tier (tier 2): Also contains the BIS application
- Database tier (tier 3): Also contains the Discoverer End User Layer (EUL)

Technical Note

For detailed information about installing the BIS architecture, consider taking the course or consulting the Oracle Applications installation manuals.

Three-Tiered Computing Model



Describing the Three-Tiered Computing Model

The BIS technology stack exists in a three-tiered architecture. This new architecture enables you to use a single sign-on to access all BIS components, including WebDiscoverer 3i.

Example of the Single Sign-on Function

- 1 Log into the personal homepage.
- 2 Select an analysis workbook from one of the intelligence menus.

Note: Analysis workbooks typically contain the word *analysis* in their titles.

After you select the analysis workbook, a WebDiscoverer applet appears and automatically opens and performs a query on the selected workbook.

All communication with the database occurs with WebDiscoverer. After retrieving the query results, the WebDiscoverer server returns the results to the browser.

Describing the Three Tiers

The three tiers include the following:

- Database tier
- Application tier
- Client tier

Describing the Three Tiers (continued)

Database Tier The database tier includes the following components:

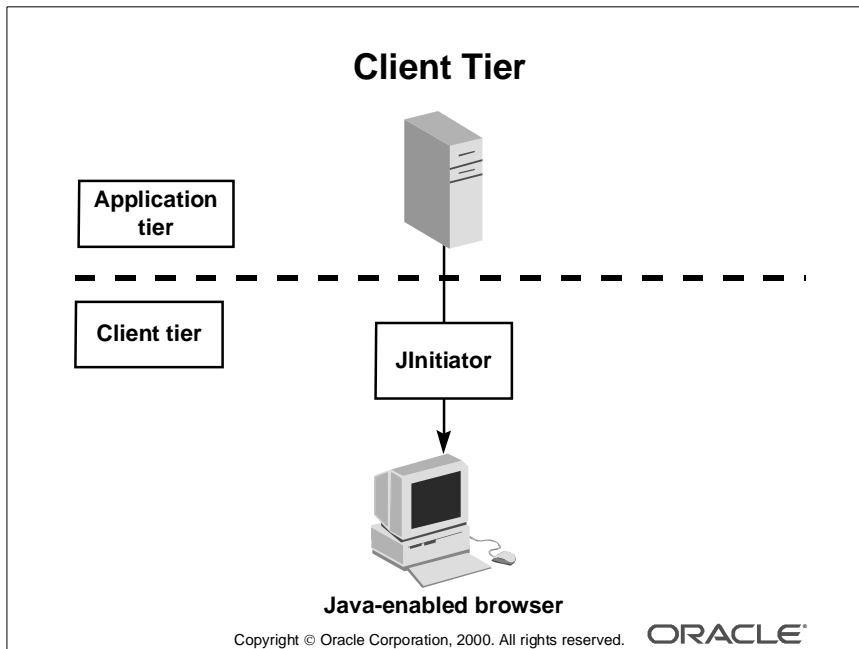
- Concurrent processing server
- Administration server
- Oracle8i database

Application Tier The application tier includes the following components:

- Web application server
- Application server
- Reports server
- Discoverer server

Client Tier The client tier includes the Java-enabled browser.

Client Tier



Explaining the Client Tier

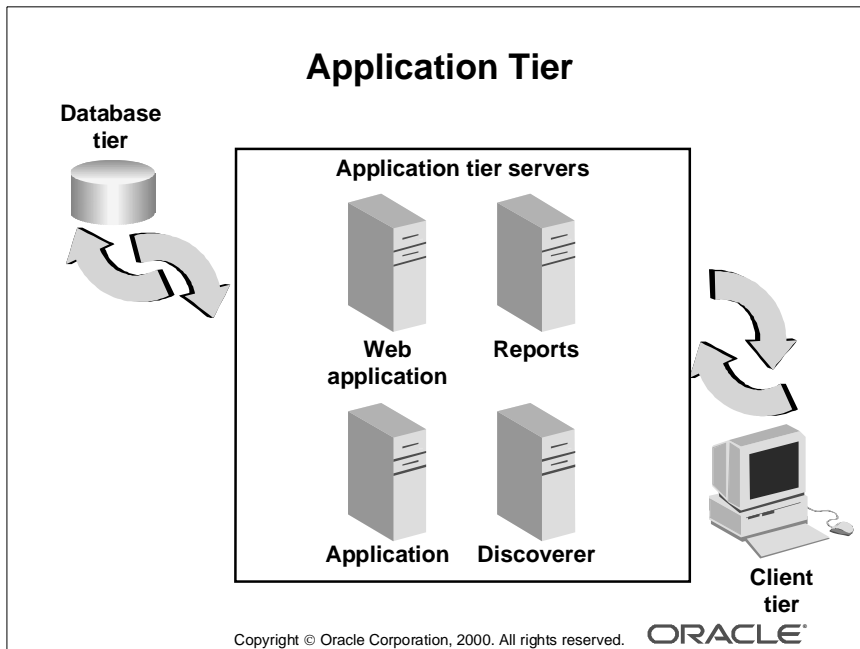
The client runs a Java applet using a Java-enabled Web browser or applet viewer.

JInitiator The JInitiator executes the Java applet that enables you to access Oracle Applications through a Web browser. At the initial login to Oracle Applications, JInitiator is downloaded from the application server to the client workstation.

Java-Enabled Web Browser You use the Java-enabled Web browser to access Oracle Applications using a single sign-on.

.

Application Tier

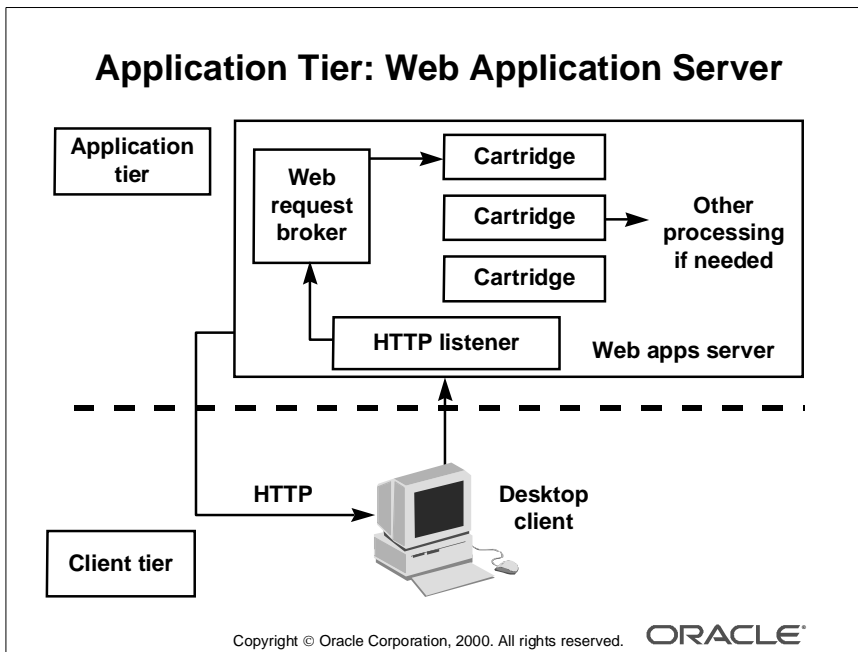


Explaining the Application Tier

The application tier contains the following components:

- Web application server
- Reports server
- Application server
- Discoverer server

The application tier provides load balancing, business logic, and other functionality. The client workstations interact only with the servers on the application tier. The servers on the application tier interact with both the client workstations and the servers on the database tier.

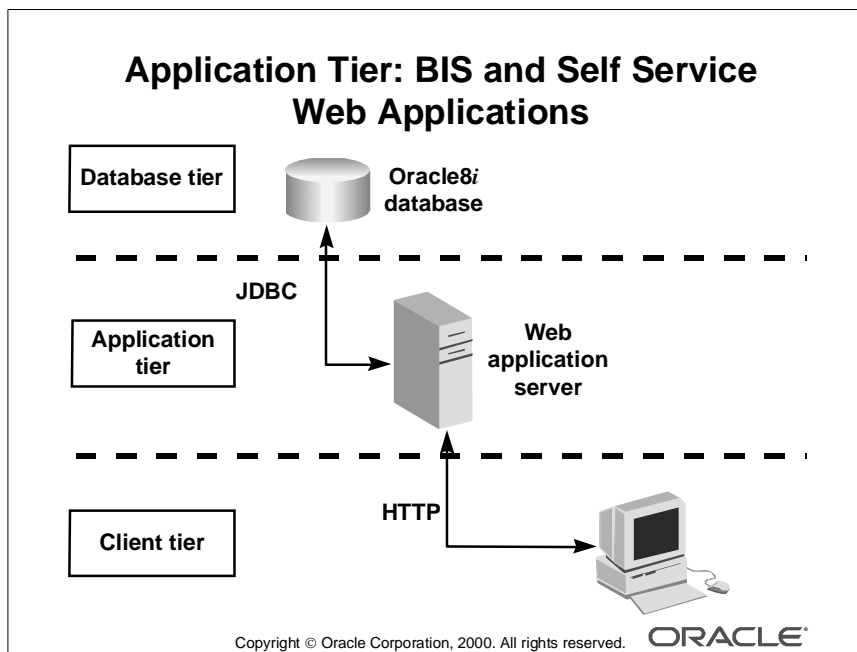


Describing the Web Application Server

The Web application server processes the requests that it receives over the network. The Web application server software consists of an HTTP (Hypertext Transfer Protocol) listener, a Web request broker, and specialized programs called cartridges (for example, the PL/SQL cartridge). Cartridges extend the capabilities of the database server. For example, the InterMedia cartridge is used by BIS to perform context-sensitive searches in Ask Oracle and Business View Catalog Search regions

HTTP Request Process The HTTP listener accepts incoming HTTP requests (URLs) from desktop clients by way of browsers. If possible, the HTTP listener services the request itself, for example, by returning a simple HTML Web page. However, if the page referenced by the URL needs some kind of advanced processing, for example, PL/SQL or Java, the listener passes the request to the Web request broker. The Web request broker then determines which cartridge can service the request and passes the request to the appropriate cartridge. Any further processing is determined by the logic of the cartridge itself.

The bulk of processing for data cartridges occurs at the database server.

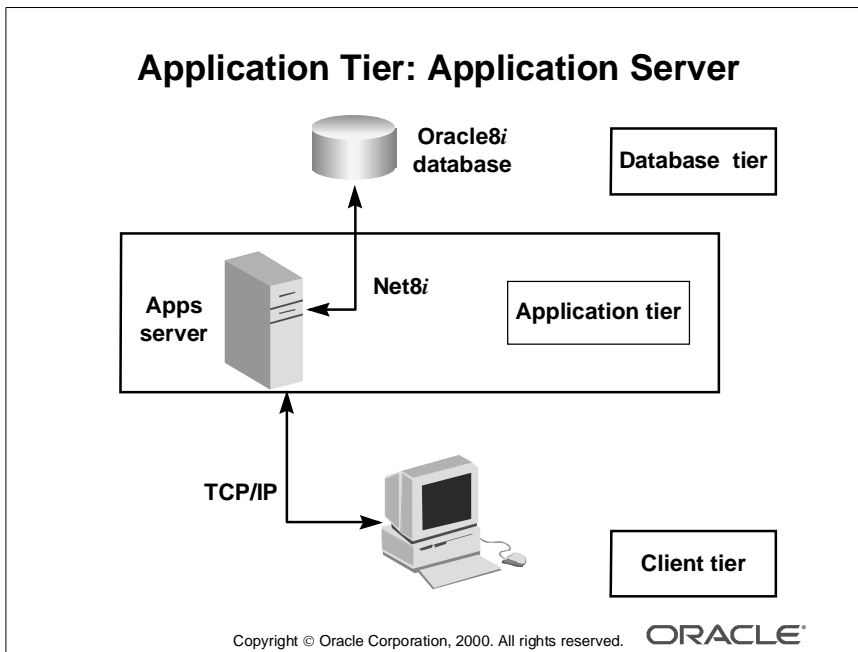


Describing BIS and Self Service Web Applications

Oracle Self Service Web Applications, including BIS, use a pure HTML and Java script user interface, or what you typically see as a standard Web page.

These Web-based applications operate by direct connection to the Oracle Web application server. Screen login is controlled by stored procedures that execute through the Web application server's PL/SQL cartridge and Java servlets.

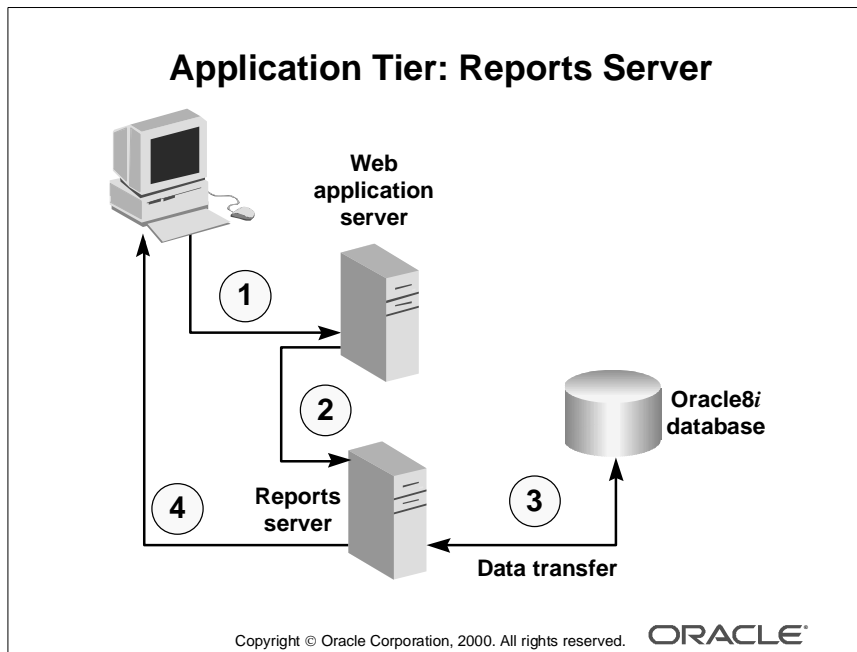
Note: Java servlets are Java programs executed by the Web application server that communicate with the database using Java database connectivity (JDBC).



Describing the Application Server

The application server mediates communication between the desktop client and the Oracle8i server. It displays the content that you see in a typical non-Web-based Oracle application, such as Oracle Payroll or Oracle General Ledger.

The application server caches data and provides it to the client tier, as needed. For example, if a user must scroll through multiple order lines, each line is displayed using the cached data. The application server communicates with the client across a standard TCP/IP network connection (or other network connection). It communicates with the Oracle8i server using Net8i (a database connection protocol).

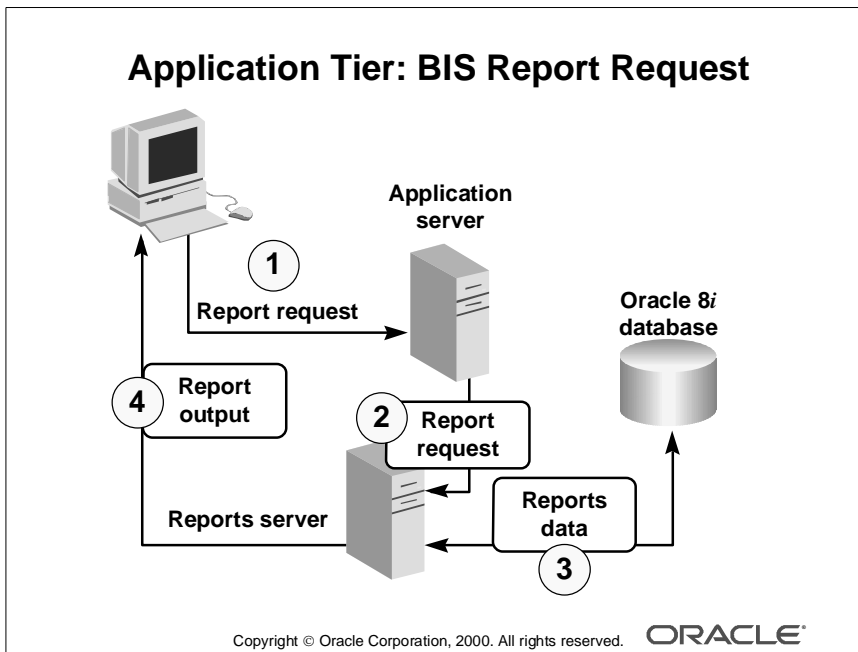


Describing the Reports Server

The slide shows an overview of the typical information flow for an Oracle report.

Clients use a Web browser to request reports, and then the Oracle Reports server executes and delivers these reports over the Web. The exchange of information between the Web server and the reports server is performed with the help of the Reports Web common gateway interface (CGI) cartridge. The reports server can be configured in a number of ways, but Oracle recommends using the Reports Web CGI.

A BIS report request is provided in more detail on the following pages.



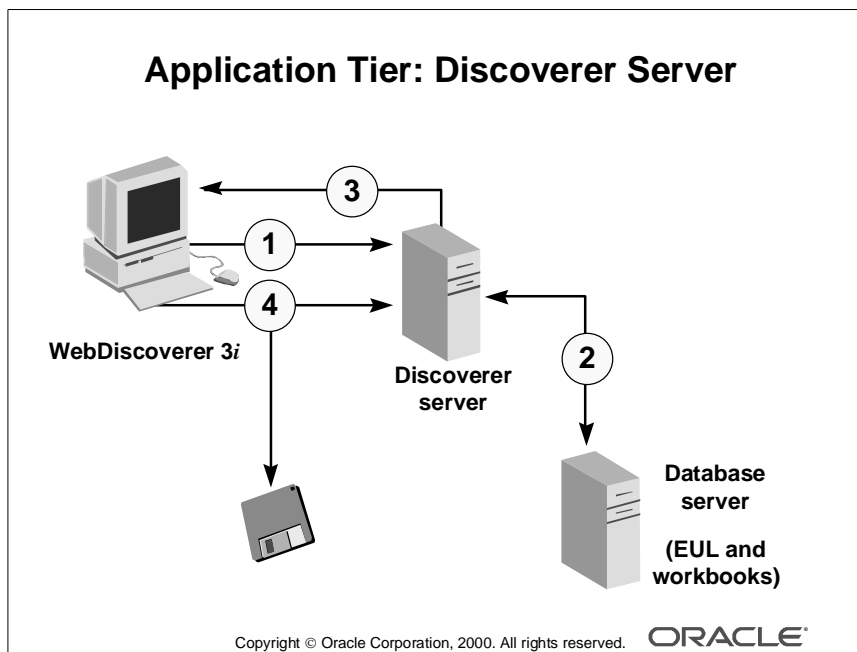
Explaining the BIS Reports Request Process

The example and the following explanation describes a typical BIS report request:

- 1 The user clicks a reports hyperlink.
- 2 The PL/SQL cartridge then requests that a report be run on the Reports server.
- 3 The reports server runs the report request and retrieves the appropriate report content from the database.
- 4 The reports server then passes the report data back to the Web browser.

Technical Note

If the request includes a time tolerance, the reports server checks its output cache to determine whether it already has output that satisfies the request. If the server finds acceptable output in its cache, it immediately returns that output rather than reaccessing the database.



Describing the Information Flow Through the Discoverer EUL

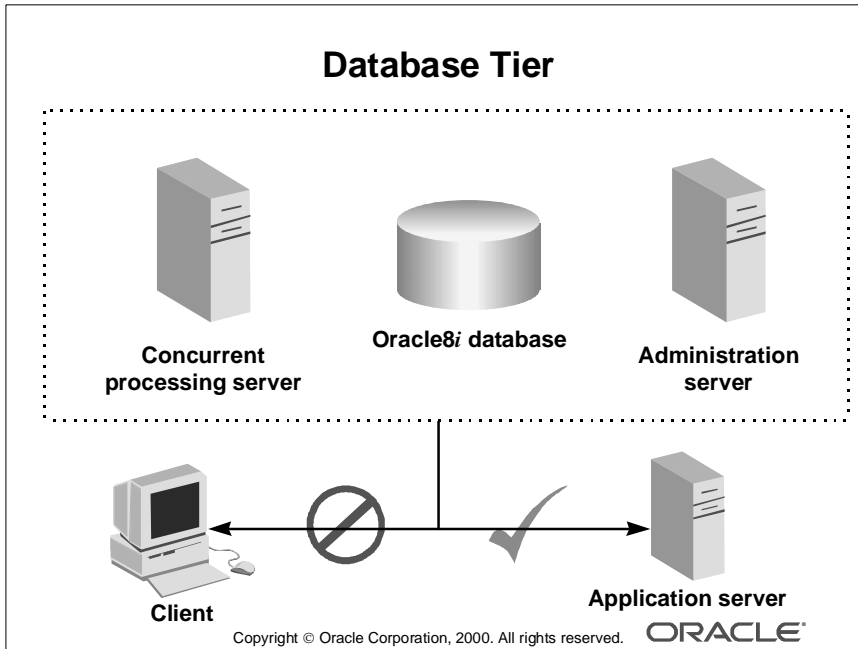
The Discoverer server communicates directly with the database to retrieve information from the End User Layer (EUL) schema, which resides on the database server.

The example shows how BIS uses the Discoverer EUL. The EUL resides on the database server.

- 1** The user accesses the Discoverer server through a Web browser to perform ad hoc queries and create workbooks through business areas.
- 2** The Discoverer server accesses the database server and retrieves the EUL schema and the BIS workbooks.
- 3** The Discoverer server then displays the business areas associated with the EUL and the BIS workbooks.
- 4** The user performs ad hoc queries using the business areas, creates new workbooks using the business areas, or executes BIS workbooks.

Note: The user must have appropriate authorization to store files on the database.

Database Tier

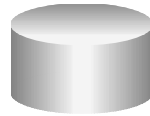


Describing the Database Tier

The database tier holds all of the data, database objects, such as indexes and tables, as well as the data-intensive programs. This tier also processes all SQL requests for data. The database tier includes the Oracle8i database, the administration server, and all concurrent processing servers. The machines in this tier communicate only with machines in the application tier. They do not communicate directly with client workstations.

Database Tier: Oracle8i Database

- **Server files**
- **Oracle database files**
 - **Tables**
 - **Indexes**
 - **Other DB objects**

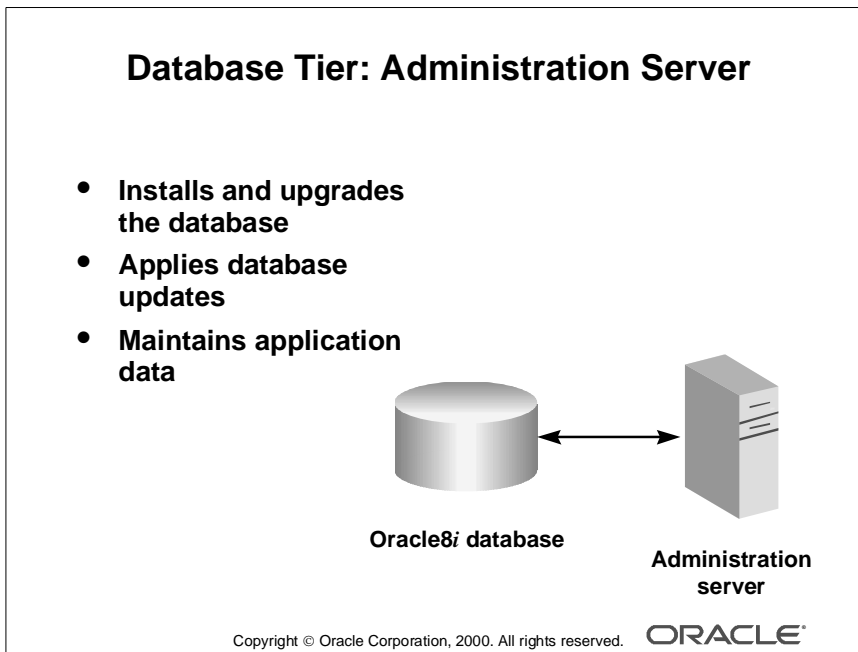


Oracle8i database

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Describing the Oracle8i Database

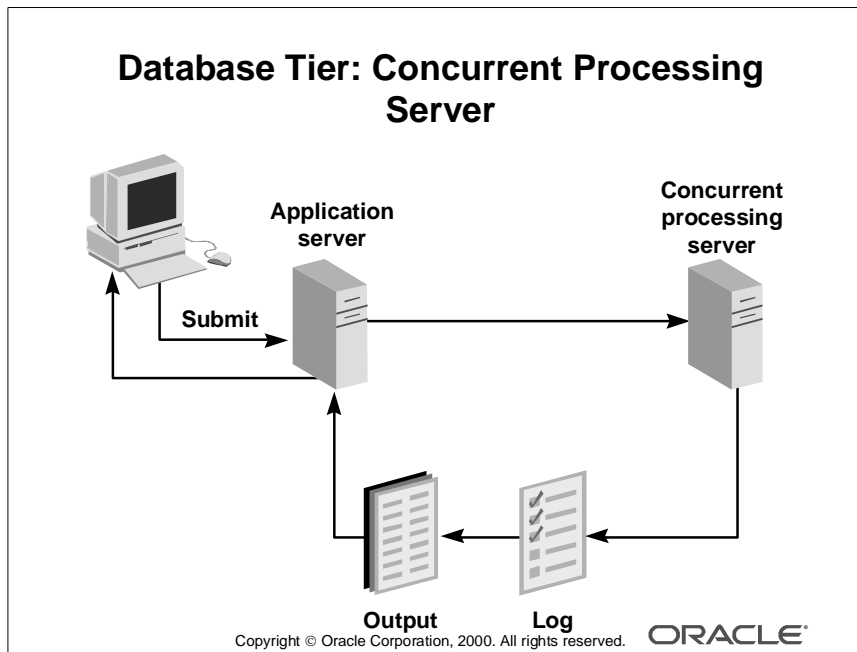
The Oracle8i database contains the data associated with Oracle Applications, release 11i. The server contains no Oracle Applications files; it contains only the Oracle8i database files, the database files that physically store the tables, indexes, and other database objects relevant to your installation.



Describing the Administration Server

The administration server is the machine from which the database administrator (DBA) maintains the Oracle Applications database. The DBA performs the following administration tasks from the administration server:

- **Installs and upgrades the database:** This occurs only with new release or upgrade releases. DBAs typically use the AutoInstall program to perform this task.
- **Applies database updates:** Most bug fixes consist of new files and scripts that update database objects. The DBA uses the AutoPatch program to apply the updates to the database objects. He or she also uses AutoPatch to update software on the database and application servers.
- **Maintains the application data:** Some features, such as Multilingual Support and Multiple Reporting Currencies, require regular maintenance to ensure that updates are propagated to the schemas that use these features. Administration programs enable the DBA to perform this type of task, as well as other software and database maintenance tasks.



Describing Concurrent Processing Servers

Although most interaction between the user and Oracle Applications occurs through Application or Web-based forms, many reports and other program requests must be handled by a concurrent processing server. The concurrent processing server processes report requests and programs that might contain a large number of computations or require large amounts of CPU time. To ensure that they do not interfere with interactive operations, such as querying and entering data, you can configure these types of programs (also called concurrent programs) to run on separate machines called concurrent processing servers.

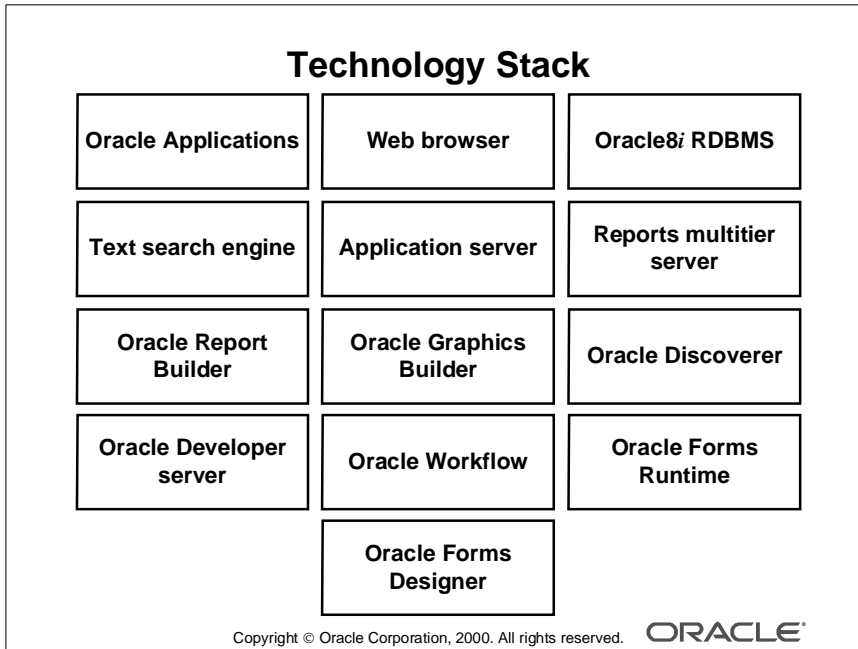
Concurrent Programs A concurrent program is a process that runs in the background while you continue working in an application. You submit a request to run concurrent programs through application forms, which insert a row into a database table that specifies the program to be run. A monitoring process reads the table and assigns the program to one of several concurrent managers running on the concurrent processing server. The concurrent manager then runs the program, which generates log and output files on the concurrent processing server.

The output of a concurrent program is stored on the concurrent processing server. When this output is requested, the report review agent passes the output file to the application server. From the application server, pages of the report are passed to the desktop client.

Technical Note

Multiple concurrent processors can be used to spread the processing load. You might want to take advantage of this feature when performing some of the BIS postinstallation tasks.

BIS Technology Stack

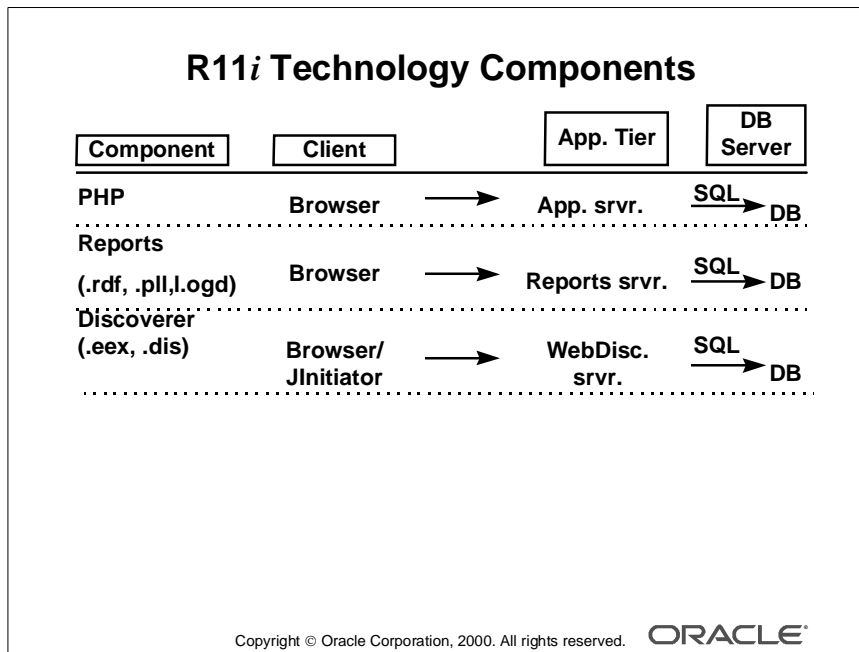


Reviewing the Oracle BIS Technology Stack

The BIS, release 11*i*, technology stack includes the components shown on the slide.

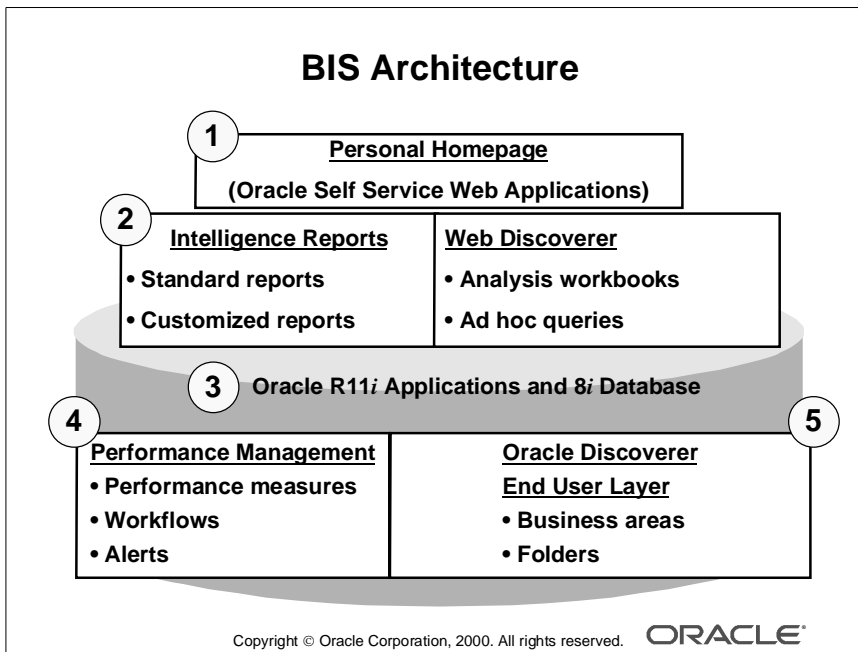
Note: Oracle BIS, release 11*i*, is based on the same technology stack as Oracle Applications, release 11*i*. It will be available on all standard Oracle Applications, release 11*i*, platforms.

Oracle Applications	11.5
Web browser (Internet Explorer or Netscape)	4.0 or higher
Oracle8i RDBMS Server Enterprise edition	8.1.6
Oracle8i text search engine	InterMedia 8.1.6
Application server	<ul style="list-style-type: none"> Web DB 2.2 Oracle Web Applications Server 4.0.8.1
Oracle Reports multitier server	6.x
Oracle Report Builder	6.0.8.3.0
Oracle Graphics Builder	6.0.5.32.1
Oracle Discoverer	3.3.x
Oracle Developer server	6.1.x
Oracle Workflow	2.5.x
Oracle Forms Runtime	6.0.6.6
Oracle Forms Designer	6.0.8.1



Oracle BIS Technology Components

The diagram on the slide shows the architecture tier that a particular BIS component accesses.

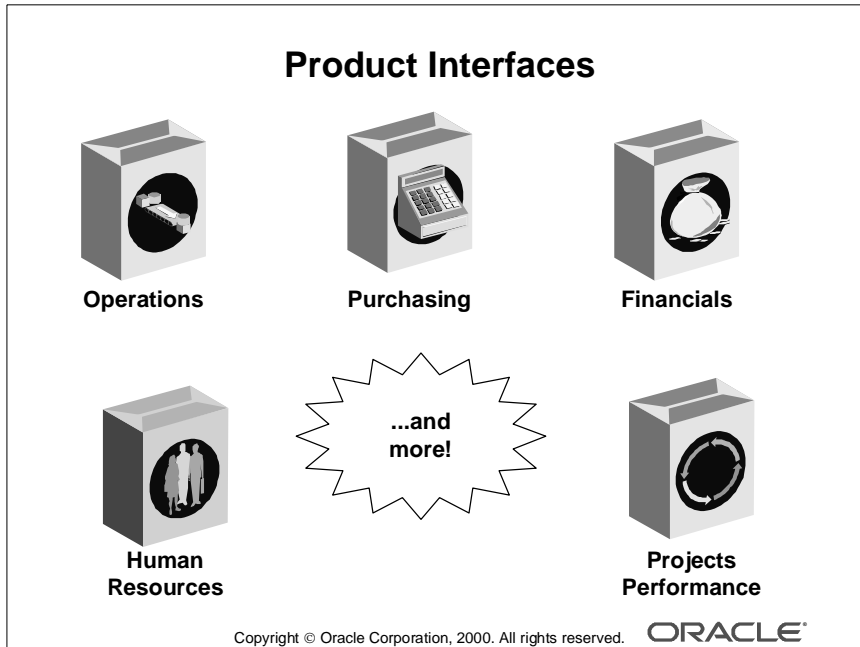


BIS Architecture

The following table provides a brief description of the BIS Architecture:

Callout Number	Description
1	The personal homepage (PHP). The BIS end user directly accesses the PHP, which represents the main user interface to BIS. The PHP is an Oracle self-service Web application.
2	Intelligence reports, which are developed using the Oracle Reports Builder, are the underlying drivers of what the users sees and links to on the PHP.
3	The Oracle Applications and database house all of the data and Oracle Applications specific forms, such as those forms that you see under the BIS Superuser responsibility. The Performance Management Framework (PMF) and the Oracle Discoverer End User Layer (EUL) reside in the database.
4	The PMF represents the mechanisms that retrieve actual values, perform comparisons between actual values and target values, and send notifications to the user. This framework relies on Oracle Alert and Oracle Workflow.
5	The Oracle Discoverer EUL contains the metadata model of the underlying database structure. The business areas and folders in these areas are based on columns in the underlying transactional tables. The folders in the EUL are typically designed using user-friendly terminology that represents the underlying column names.

BIS Product Interfaces



Oracle Products That Interface with BIS

BIS retrieves actual values as well as other data, such as names and dates, from the following Oracle Applications:

- Operations
- Process Manufacturing
- Purchasing
- Financials
- Human Resources
- Projects Performance
- Customer Relationship Management products
- Supply Chain
- Public Sector

Note: BIS also includes individual intelligence areas that are specifically related to each application of the foregoing products.

Practice 13-1 Overview

Practice 13-1 Overview

This practice covers the following topics:

- Explaining the multitiered computing model
- Describing the BIS technology stack
- Explaining BIS architecture
- Describing BIS product interfaces

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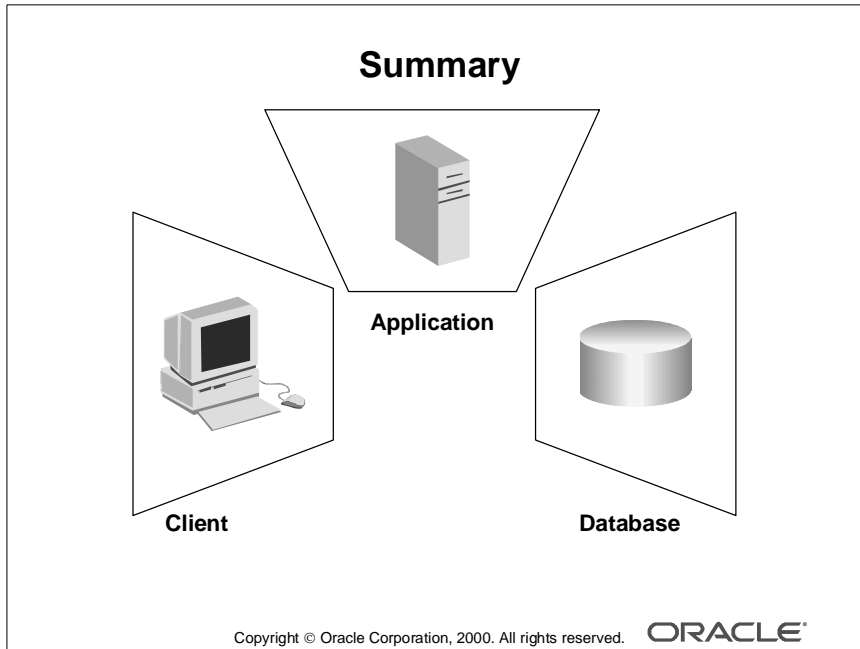
Overview

In this practice, you answer a series of conceptual questions that reinforce the concepts of the BIS architecture and the three-tiered computing model.

Performing This Practice

For detailed instructions on performing this practice, see Practice 13-1 in Appendix A, “Practices and Solutions.”

Summary



Summary

This lesson explained the multitiered computing model and described the BIS architecture and how it fits within the three-tiered model.

Describing Oracle Alerts

Objectives

Objectives

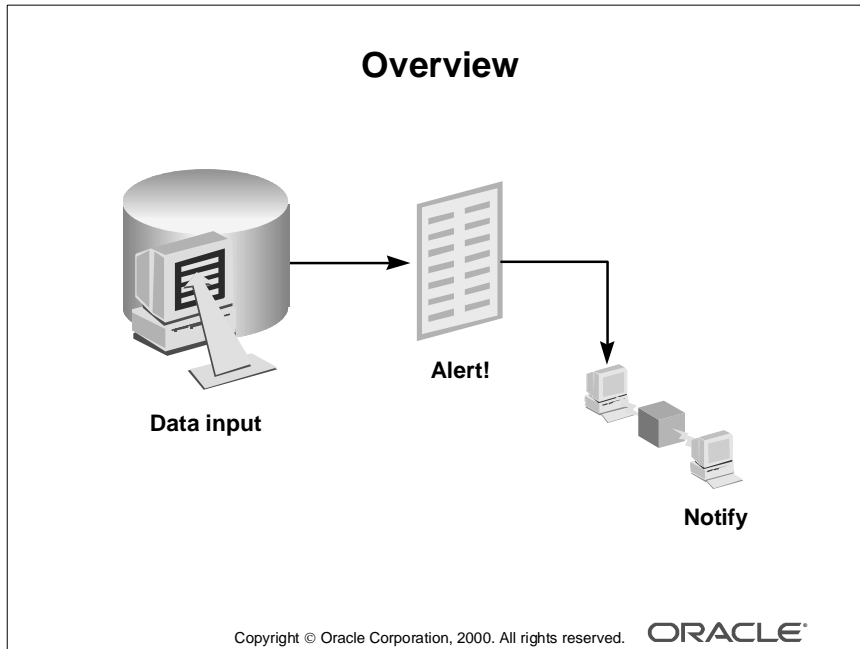
After completing this lesson, you should be able to do the following:

- Describe Oracle alerts
- Explain the alerts setup process

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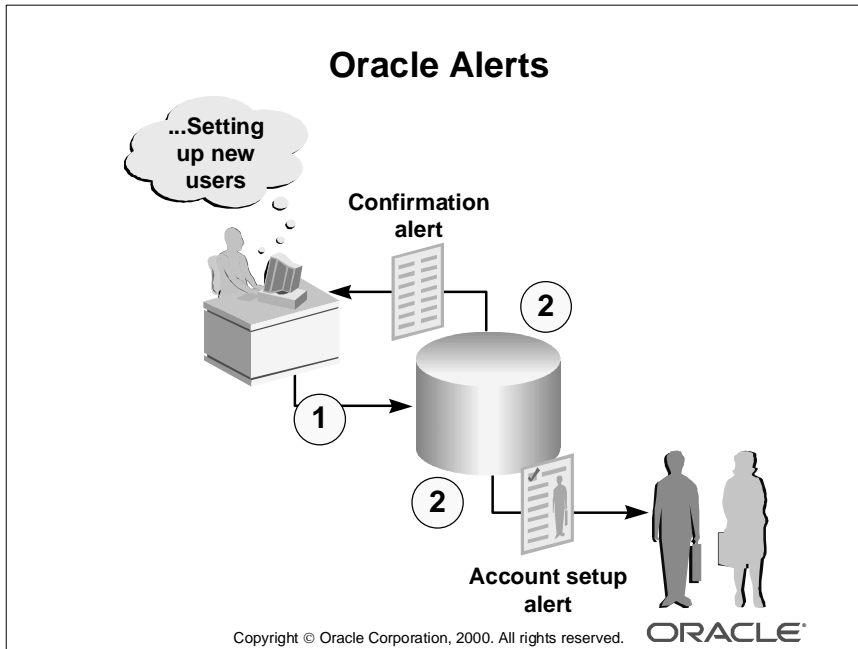
Overview



Importance of This Lesson

BIS uses preseeded procedures that are associated with Oracle alerts to calculate and check actual values against predetermined targets. This lesson describes Oracle alerts and explains the alerts setup process.

Oracle Alerts



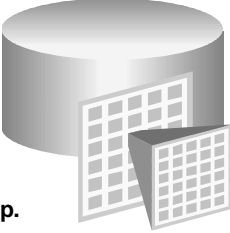
Describing Oracle Alerts

Oracle alerts monitor your database and notify you when a condition that you specified has occurred. For example, suppose that the system administrator wants to notify new users of their user ID and account number, or perhaps the human resources manager wants to be notified every time an employee leaves the company. These scenarios represent the types of situations in which to define an alert.

Alert Definition

Alert Definition

Inv_No	Amount	Vendor
989	50	ABC Corp.
988	100	Brick Inc.
985	45	Colter Inc.
977	78	Brizzell Corp.



```

SELECT inv_no, amount, vendor
INTO  &vendor
      &amount
      &inv_no
FROM Invoice
WHERE amount > 60
ORDER BY inv_no

```

Notification

Vendor: &Vendor

Amount: &Amount

Invoice #: &inv_no

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Defining Alerts

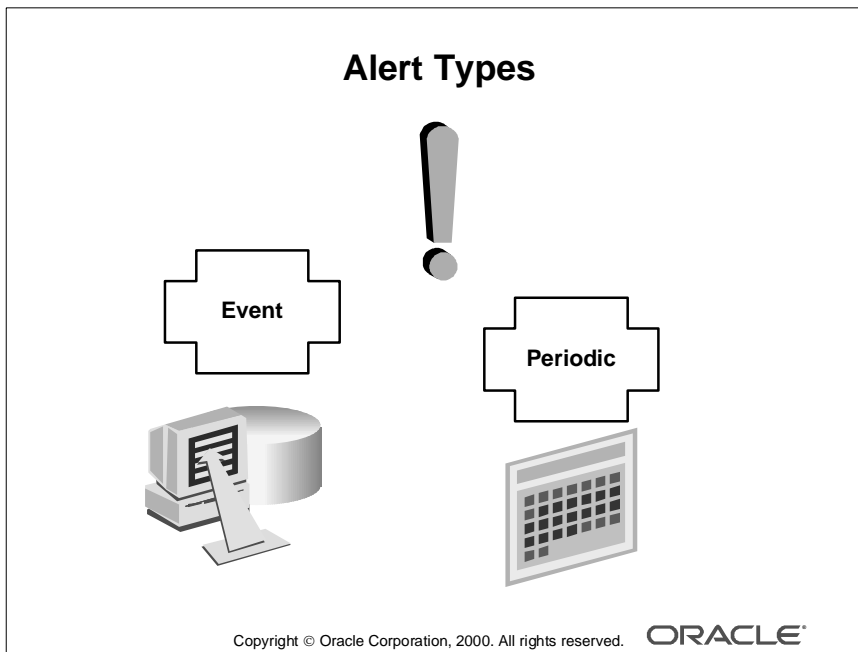
When you define an alert, you create a SQL select statement that retrieves information from the database based on a condition or conditions that you specify. This information is then passed into variables that typically appear in the body and subject line of notification messages.

Alert Example Suppose that you want to be automatically notified about any invoices greater than \$60. The SQL statement shown on the slide represents the alert created to monitor invoice amounts. Whenever an invoice greater than \$60 occurs, Oracle Alert sends you a message that indicates the vendor, the invoice amount, and the invoice number.

The SQL SELECT statement retrieves the specified data from the database and enters it into variables that you specify. In the example, the invoice number, amount, and vendor are all retrieved into the respective variables, which are indicated after the INTO clause.

Note: Variables are preceded by an ampersand.

After Oracle Alert retrieves the data into the variables, the variables are displayed in the workflow notification, provided that you set them up in the notification template.



Describing Alert Types

Oracle Alert includes two types of alerts:

- Event
- Periodic

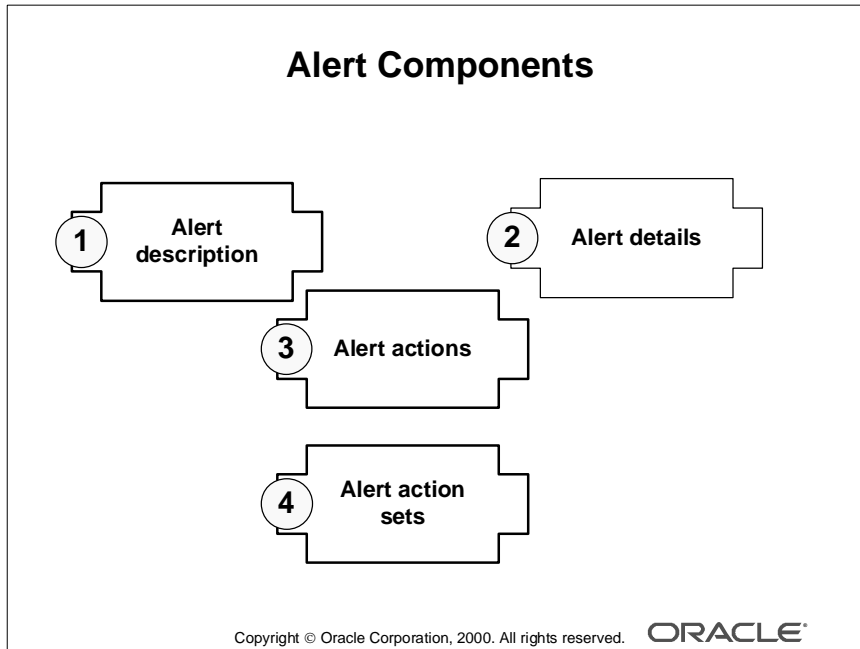
Event Alerts Event alerts occur as soon as an update or insert is made to the database. You typically set up event alerts so that you can timely track important or unusual events as they happen. When you create an event alert, you specify the following:

- The database event that you want to monitor (this can be either an insert or update to a specific database table)
- A SQL SELECT statement that retrieves specific database information as a result of the database event
- Actions that you want Oracle Alert to perform as a result of the database event

Periodic Alerts In contrast to event alerts, periodic alerts occur at times that you specify. For example, you might specify that a general ledger alert that sums monthly sales figures be run on the last day of the month. When you create a periodic alert, you specify the following:

- A SQL SELECT statement that retrieves specific database information
- The frequency at which you want the Periodic alert to run the SQL statement
- Actions that you want Oracle Alert to perform after it runs the SQL statement

Alert Components and Process



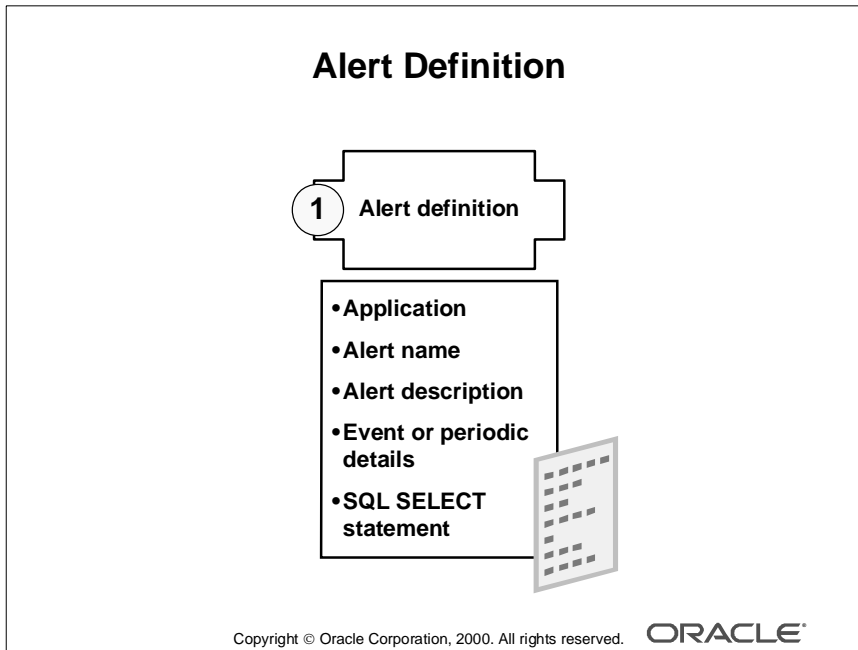
Describing Alert Components

When you create either an event or a periodic alert, you define the following alert components:

- Alert description
- Alert details
- Alert actions
- Alert action sets

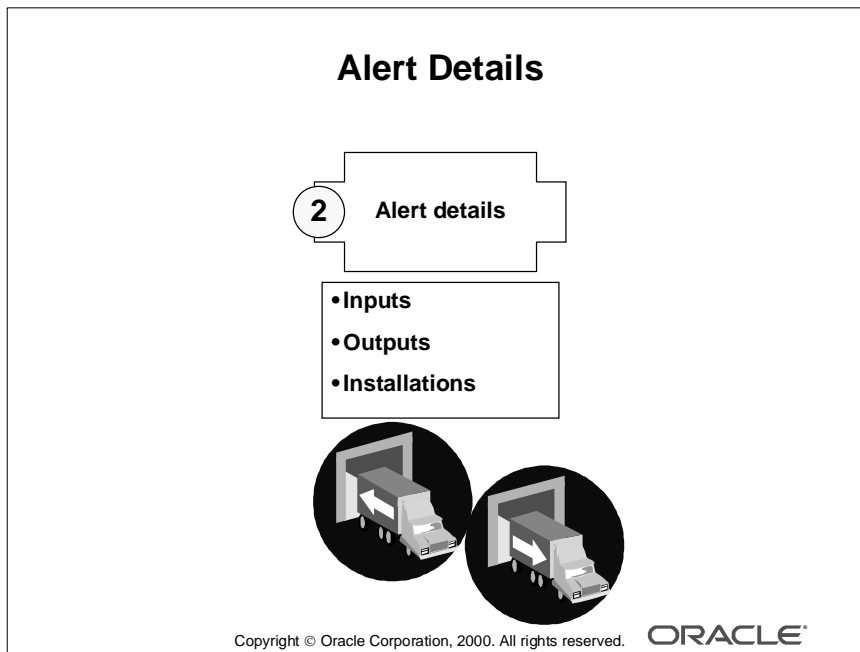
Each of these components represents a separate window in the Oracle Alert system.

When you set up an alert, you define each component based on the order listed on the slide.



Describing Alert Components (continued)

Alert Definition The alert definition includes the application to which you want to define the alert, as well as an alert name and description that you specify. When you define an alert, you also specify whether or not the alert is an event or a periodic alert. You also define the SQL SELECT statement during alert description setup. Remember, the SQL SELECT statement retrieves data from the database and inserts the data into the variables that you specify. This statement also defines the condition on which you want the alert to run.



Describing Alert Components (continued)

Alert Details This window contains the following tabbed pages:

- Inputs
- Outputs
- Installations

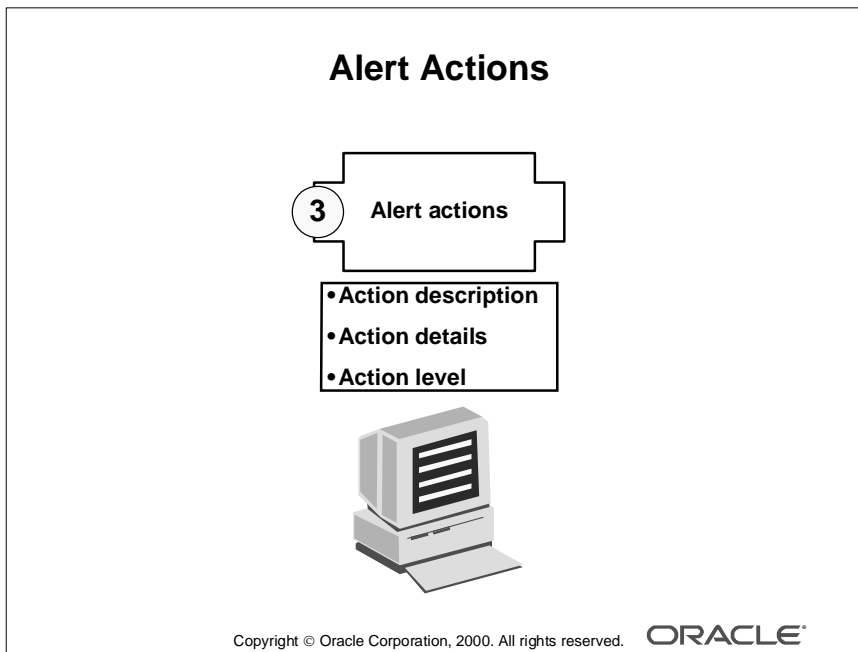
You use the Inputs page to set up optional default values for your alert inputs. Currently, BIS alerts do not use this region.

You use the Outputs page to define the length of each of the output variables that you want to appear in your alert actions. You can also update the variable description on this page. For example, assume that a variable format is 40 CHAR; you might specify that this length be changed to 25 or 30 CHAR.

You use the Installations page to select the schema and organization names that Oracle Alert uses to access tables. The most typical entry that you see on this page is APPS, which represents the Oracle Applications schema. When setting up installations, you must also select the appropriate organizations.

Technical Note

Schemas contain all of the database objects, such as tables, indexes, and views, for a particular set of products or applications.



Describing Alert Components (continued)

Alert Actions Alert actions describe the action that occurs after Oracle Alert runs the SQL statement. Actions might include any of the following types of action:

- Message: Sends the retrieved information to someone in an e-mail message
- Concurrent program
- Operating statement script
- SQL statement script (Most BIS alerts use the SQL statement script, which includes the calling the workflow process.)

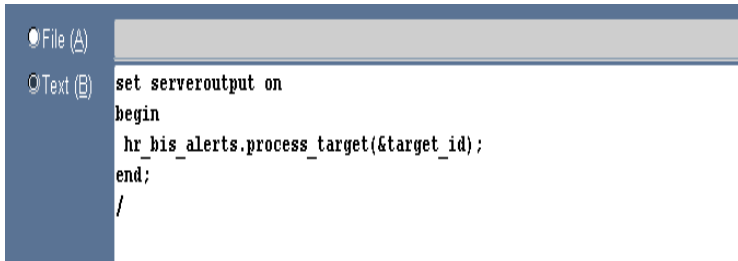
You can set up multiple actions for a single alert.

Action Details When you set up actions, you first provide an action description, such as the name of the action. Next, you set up action details, which includes specifying the following information:

- Type of action
- Any associated application and arguments for the action
- File or text statement that represents the action

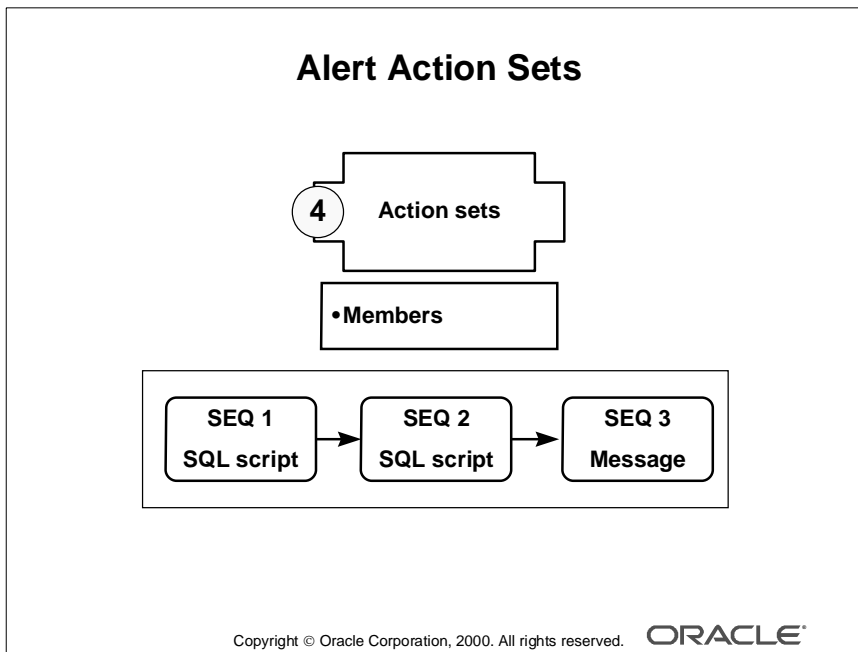
Describing Alert Components (continued)

Action Details (continued) The following example illustrates a SQL script action type that runs a BIS procedure:



In this example, the action instructs Oracle Alert to run a package called `hr_bis_alerts`. This package takes a variable `target_ID` and passes it to the `process_target` procedure.

Action Levels Action levels determine how exceptions are handled. There are two types of action levels: summary and detail. Summary action levels retrieve all rows applicable to each exception. Detail action levels retrieve specific exceptions.



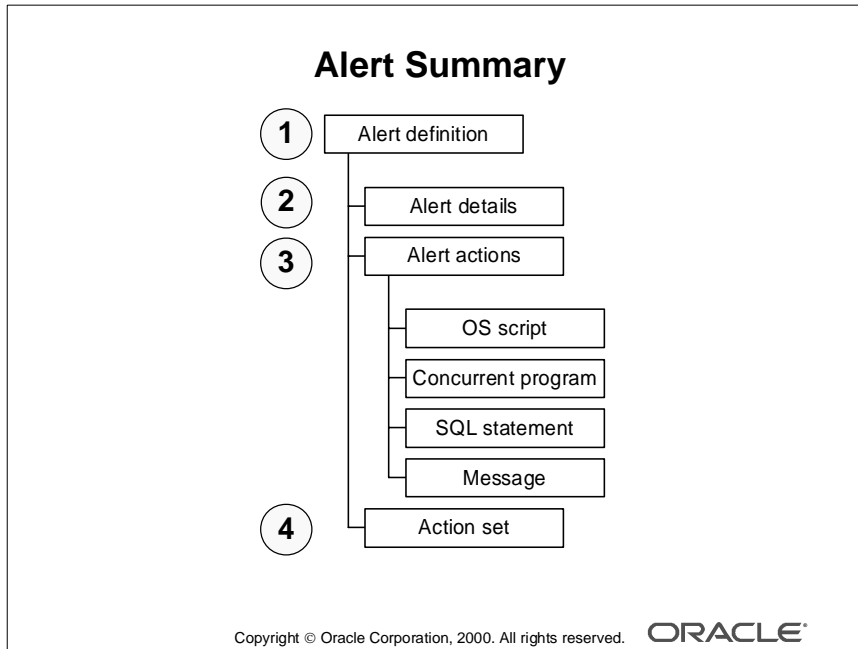
Describing Alert Components (continued)

Alert Action Sets Action sets represent each of the actions that you previously defined, as well as the order in which you want them run. Some alerts include only one action in the action set, but others include more than one action.

Note: Every alert must include at least one action.

The example on the slide shows three actions, which includes two SQL scripts and one message all in a single action set.

Alert Setup Summary

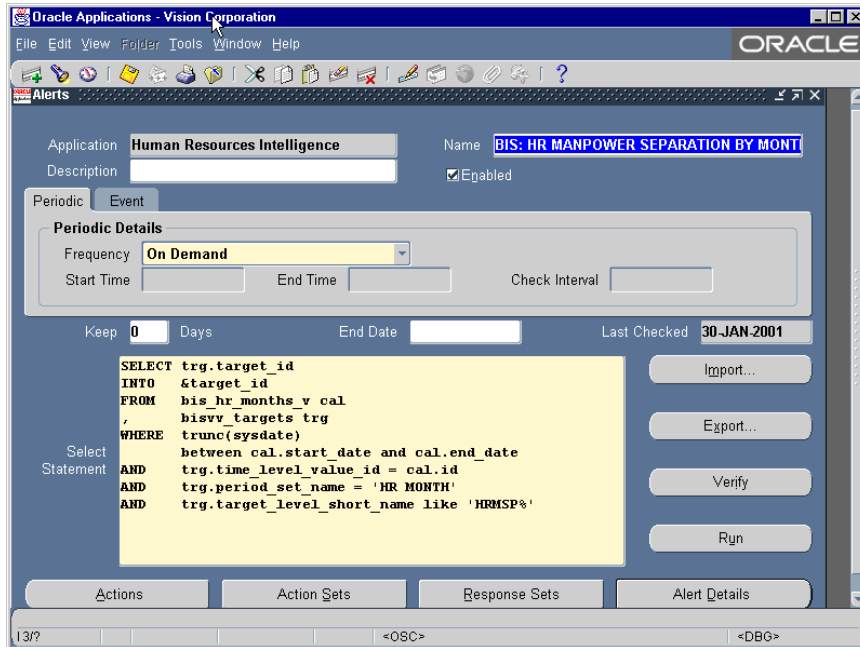


Alert Setup Summary

The previous pages discussed the various components of an alert. The summary shows the basic setup steps required for an alert.

- 1 Define the alert, which includes naming the alert and also indicating the type of alert, either event or periodic.
- 2 Set up the alert details, which includes defining the alert inputs, outputs, and installations.
- 3 Set up one or more of the alert actions, which are shown on the slide.
- 4 Add the alert actions to the action set.

Alerts Window



Summary of Setting Up the Alerts Window

To access the Alerts window, select the Alert Manager application from the Navigate region on the BIS PHP.

As previously mentioned, you describe the alert as well as the SQL SELECT statement in the Alerts window. To access the following alert components, click the applicable buttons:

- To describe the alert, complete the window shown, including defining the alert type (either periodic or event). Use the Check Interval field to specify the time that the alert runs.
- To set up alert inputs, outputs, and member, click the Alert Details button.
- To set up alert actions and action details, click the Actions button.
- To set up action sets, click the Action Sets button.
- To set up optional response sets, click the Response Sets button.

Note: For more information about how to create event or periodic alerts, refer to the Oracle Alert online Help or the *Oracle Alert Release 11i* course materials.

Practice 14-1 Overview

Practice 14-1 Overview

This practice covers the following topics:

- Describing Oracle alerts
- Explaining the alerts setup process

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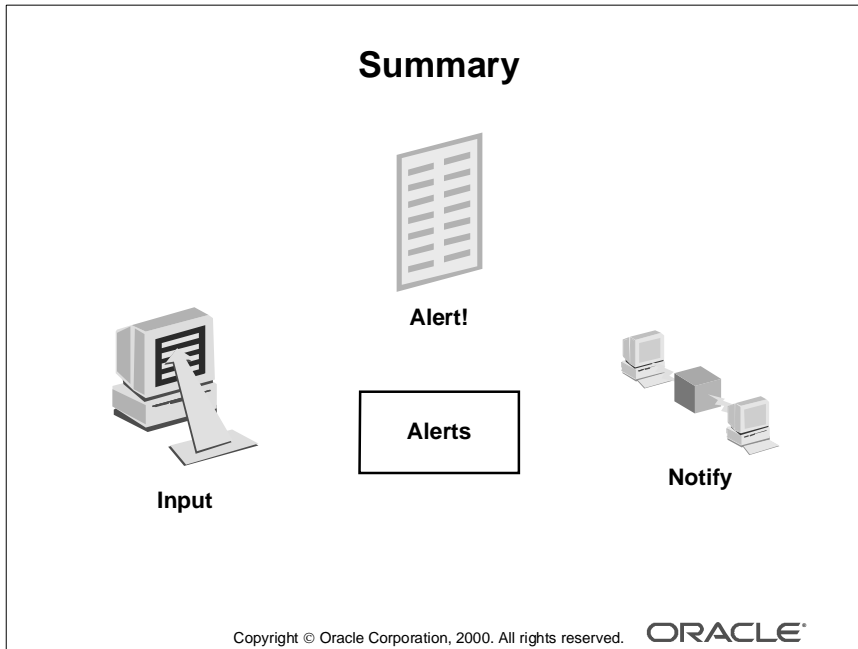
Overview

In this practice, you answer a series of conceptual questions that reinforce the concepts of BIS alerts.

Performing This Practice

For detailed instructions on performing this practice, see Practice 14-1 in Appendix A, “Practices and Solutions.”

Summary



Summary

This lesson described Oracle alerts and explained the alerts process, which includes the following steps:

- 1 Data is input into transaction tables.
- 2 Based on the alert definition, this data is checked to determine if it meets the conditions specified in the alert.
- 3 If the data does not meet the specified conditions, an alert is triggered that calls Oracle Workflow and the notification is sent to the responsible party.

Describing Oracle Workflow

Objectives

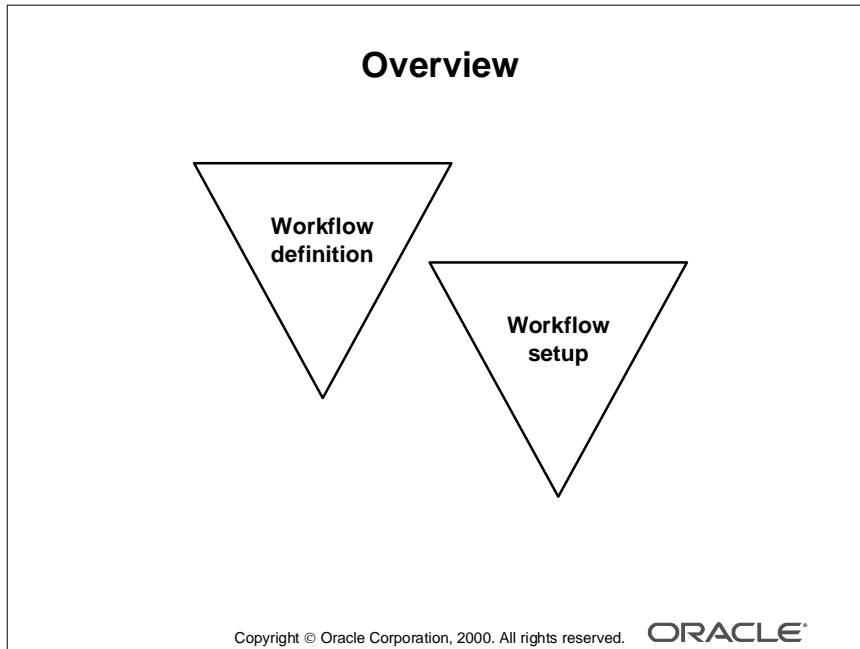
Objectives

After completing this lesson, you should be able to do the following:

- **Define Oracle Workflow**
- **Explain the Oracle Workflow setup process**
- **Build a workflow**

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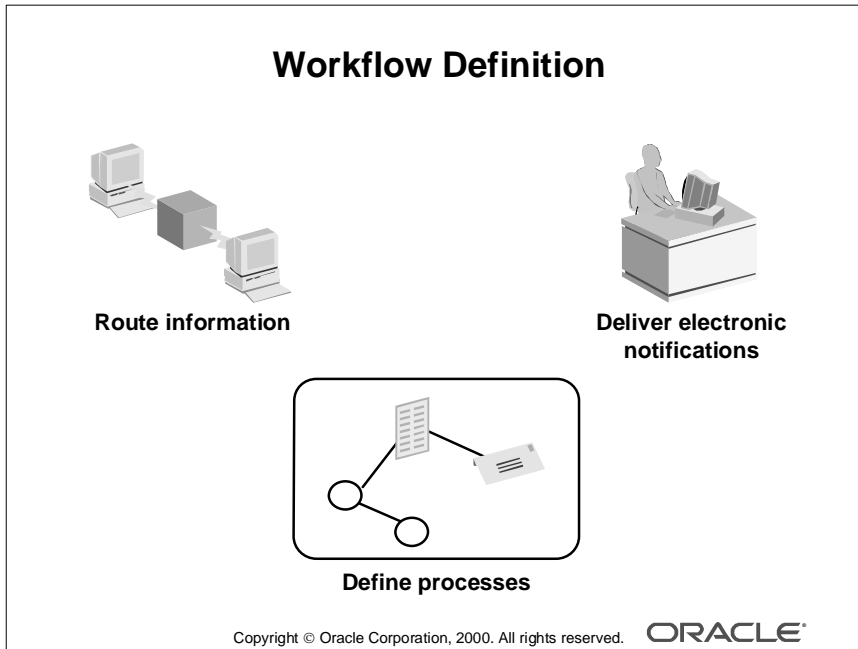
Overview



Importance of This Lesson

This lesson describes Oracle Workflow and the Oracle Workflow setup process.

Workflow Definition



Defining Oracle Workflow

Oracle Workflow is a software tool that you can use to define and automate business processes. With Workflow, you can do the following:

- Route information
- Define business rules and processes
- Deliver electronic notifications

Workflow Product Description The Workflow product comprises the following major parts:

- Workflow Builder
- Workflow Engine
- Notification System

You use the Workflow Builder to define the components and then build a workflow process diagram that uses the components. The Workflow Engine, which is embedded in the database server (Oracle8i), performs the following activities:

- Locates the Start activity in the process definition
- Drives the item through the process, performing all automated steps until a notification or blocking activity occurs (A blocking activity might be a required program that needs to run before the workflow completes.)
- Calls the Notification System to deliver the notification message to an appropriate role, which completes the notification response

Defining Oracle Workflow (continued)**Workflow Product Description (continued)**

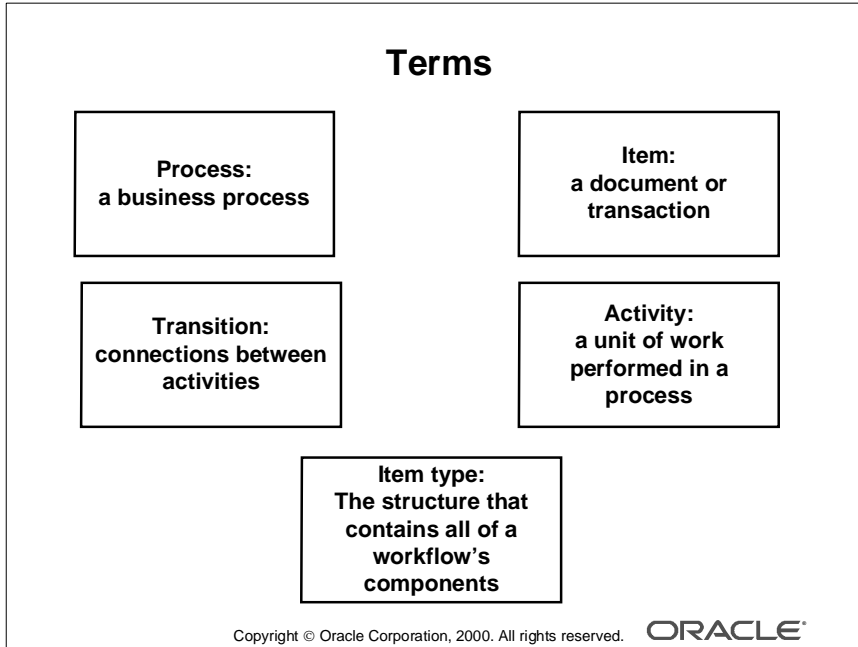
- Continues to drive the item through the remaining activities in the process

The entire process completes when the Workflow Engine encounters an End activity.

Oracle Workflow and BIS BIS uses Oracle Workflow to define and to send corrective actions related to performance measures. When you assign a corrective action to target level of a performance measure, all users assigned to that responsibility will receive a notification from Oracle Workflow when the performance measure does not meet the target. If an actual value falls outside a defined target range, the Oracle Alert procedure calls a BIS workflow, which then routes notifications to the appropriate people.

Note: The next lesson discusses more about the integration of BIS alerts and workflows.

Workflow Terms

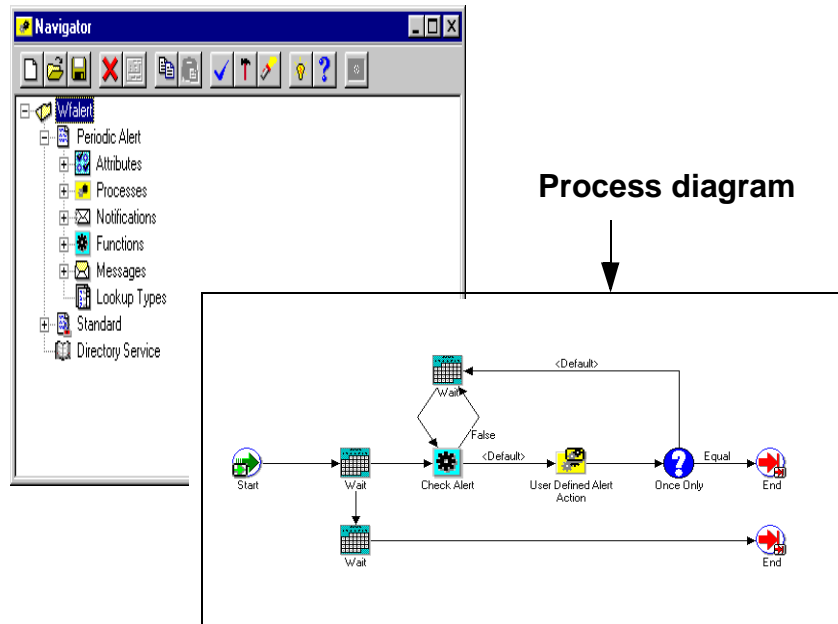


Common Workflow Terms

The following table provides typical Workflow terms and definitions:

Term	Definition
Process	A series of actions taken to manage a document or transaction to achieve a desired result. A process is represented by a workflow diagram
Item	A document or transaction; example: Requisition 1005
Item type	The structure that contains all of a workflow's components
Activity	A unit of work that is performed in a process. The unit of work can be a function, notification, or process.
Functions activity	An automated unit of work that is defined by a program written as a PL/SQL stored procedure.
Notification activity	A unit of work that sends a message to a role. A role in Workflow is like a responsibility in Oracle Applications.
Process activity	Activities that represent subprocesses
Transition	The relationship that defines the completion of one activity and the activation of another activity within a process. A transition is represented as an arrow between two activities in a workflow diagram.
Work store	A database or flat file
Node	Represents the server that is the location of the work store

Oracle Workflow Builder



Describing the Workflow Builder

You use the Oracle Workflow Builder to define and diagram workflows. This software includes two major components:

- Workflow Navigator
- Process diagrammer

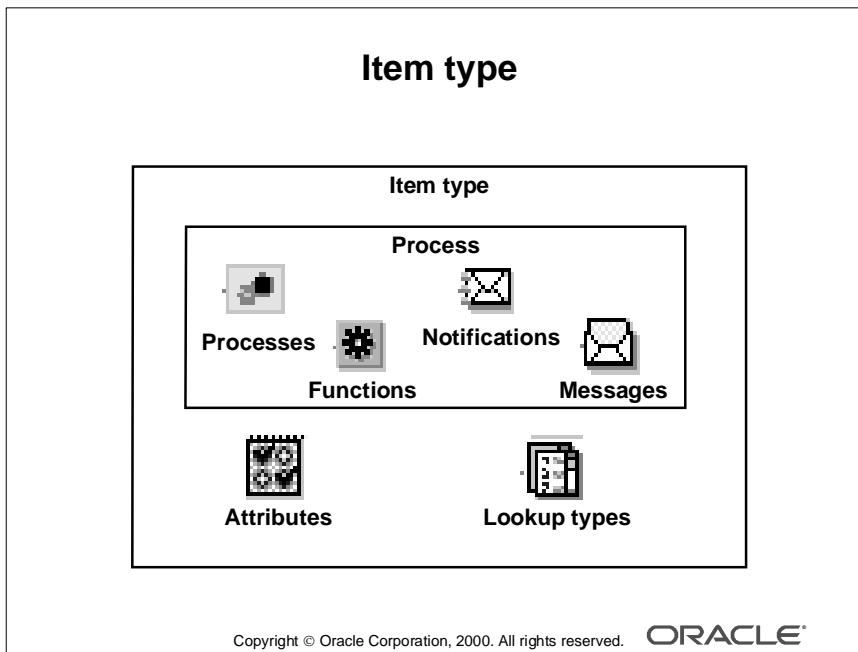
The Workflow Navigator contains all of the pieces that you need to define or create a process.

The process diagram represents the canvas that you use to build the actual workflow process. You can drag the pieces you define in the Workflow Navigator directly onto the process diagram.

Note: You can view preseeded BIS workflow diagrams by connecting to the appropriate BIS database and then selecting the BIS-related item type (typically labeled OBIS Corrective Action). This lesson reviews the workflow diagrams created in the Workflow Builder using Oracle's Self Service Web Applications.

Overview of the Workflow Setup Process

When you set up a workflow, you typically define each component of the workflow (components are listed in the Navigator) and then create a process diagram in the process window.



Describing Workflow Item Types

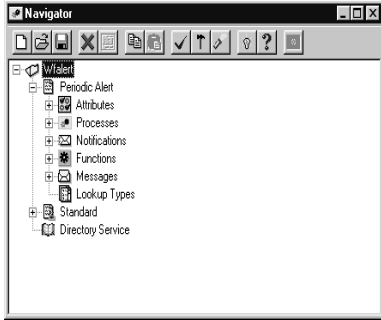
Before designing a workflow process, you must create a workflow item type. A workflow item type contains all of the components that you use to define the workflow process. The item type acts as the data store for each of these components, which are shown on the slide.

When you define the item type, you specify a name and description. For specific instructions on how to define an item type, select Help from the Navigator window and then search on item types.

Item Type Components

Components

- **Attributes**
- **Processes**
- **Notifications**
- **Functions**
- **Messages**
- **Lookup types**



The screenshot shows a window titled 'Navigator' with a toolbar and a tree view. The tree view is expanded to show a 'Workflow' folder, which contains subfolders for 'Periodic Alert', 'Attributes', 'Processes', 'Notifications', 'Functions', 'Messages', 'Lookup Types', 'Standard', and 'Directory Service'.

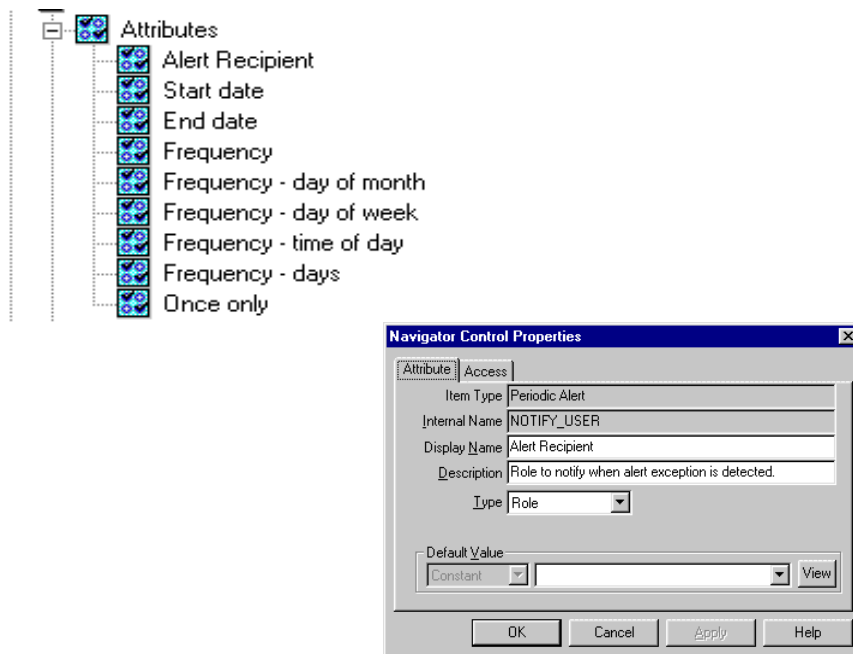
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Describing Item Type Components

You further define an item type by creating components, such as attributes and processes. To access properties for any component, you select the component and then press the right mouse button. You can also access properties from the Edit menu of the Navigator. After you define them, you drag components from the Navigator onto the process diagram to build a business process.

Note: Each component is described in more detail on the following pages.

Any component might contain one or more subcomponents. For example, you typically define many attributes for a single workflow. You can also define multiple processes, functions, notifications, and so on.



Describing Attributes

Attributes are similar to global variables that can be referred to or updated by any activity in a process. An attribute often provides information about an item that is necessary for the workflow process to properly manage the item. You can define attributes of the following types:

Attribute Type	Attribute Use
Text	Text string attribute. You specify the maximum length of the text attribute.
Number	Number attribute. You can optionally provide a format mask for the number.
Date	Date attribute. You can optionally supply a format mask for the date.
Lookup	Lookup attribute. You specify lookup code values.
URL	Uniform Resource Locator (Web site) that a user can access when viewing notifications from the Notifications Web page (in BIS)
Form	Internal Oracle Applications form function and any optional form parameters of a form that you want a user to access from the Oracle Applications Notification Viewer form
Document	Attached document as specified by the document type
Role	Role name. You must initially load the roles from the database to display a list of roles from which to choose.

Technical Note

Oracle Workflow does not maintain its own repository of users and roles. To obtain role and user information, Oracle Workflow maps to the FND_USER and PER_ALL_PEOPLE_F tables to create the following user-related views:

- WF_USERS
- WF_ROLES
- WF_USER_ROLES

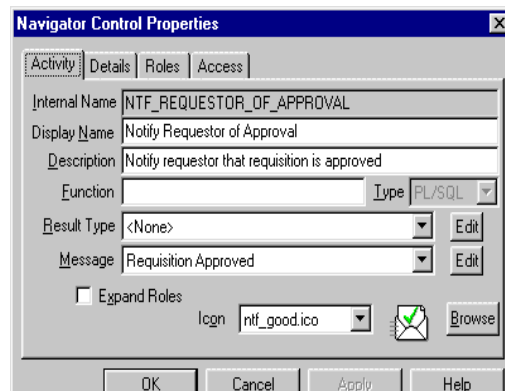
Each view contains the columns that Oracle Workflow references to retrieve user and role information. For more information about these views, refer to the *Oracle Workflow, Release 11i* curriculum.

Describing Attributes (continued)

In addition to specifying attribute types, you define the following information for attributes:

- Information that is required by notification messages, such as the display format of a currency value or a date format
- Information that is required by function activities, such as a parameter that links back to applications data, such as a person's identification number
- Information that is maintained by a workflow activity, such as activities that identify to whom you should forward information

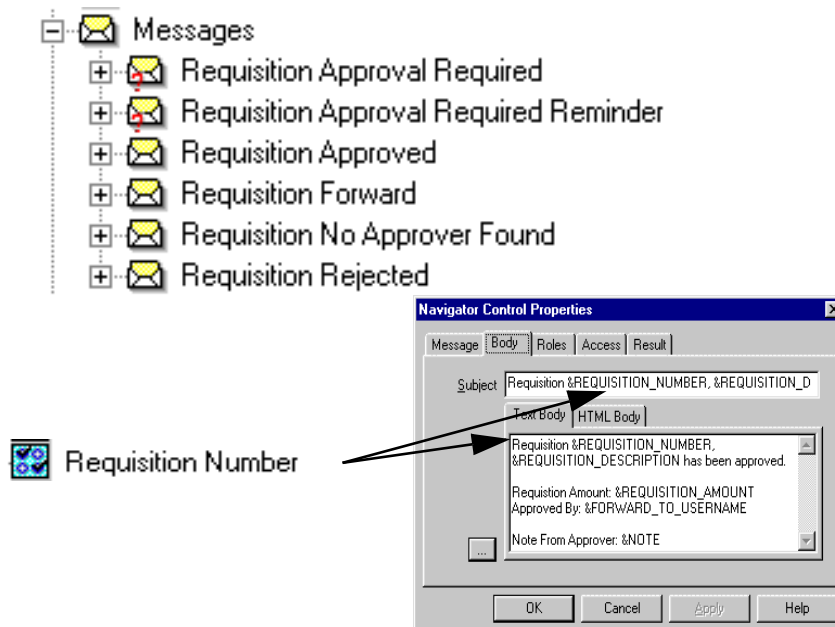
The example depicts attributes that specify date frequencies, such as day of the week. It also shows an attribute for specifying the role for an alert recipient.



Describing Notifications

You set up notification components if your workflow routes messages to one or more people. The notifications activity sends a message to a performer. You use the message component to define the message that the notification sends. The message can be an informative note or it can prompt the recipient for a response. When you define notifications, you select the message (from a list of values) that you want associated with the notification.

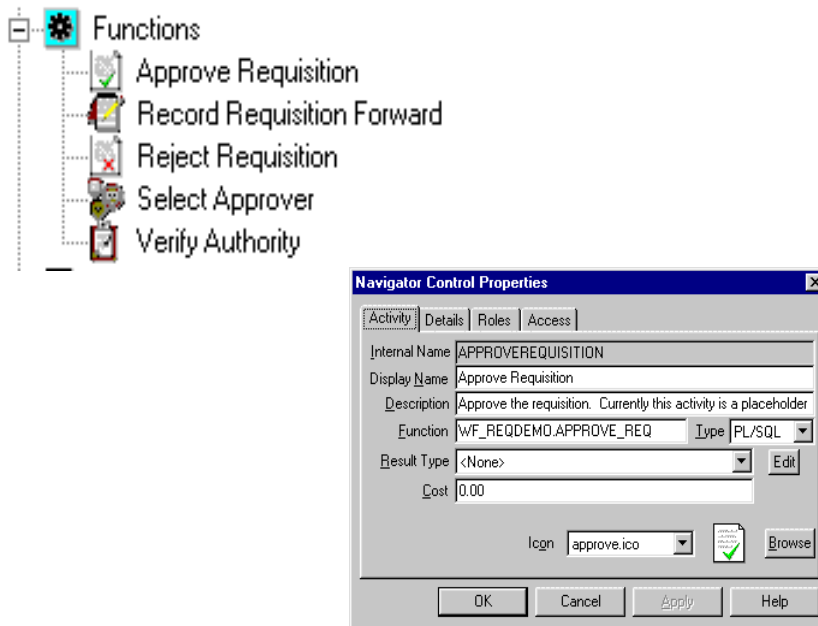
You can set up multiple types of notifications, such as approval notifications and forward notifications.



Describing Messages

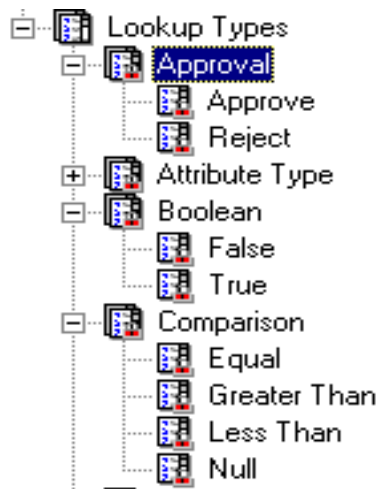
Messages are the actual message body and text that is sent by the notification. You enter the body of the message by selecting the Body tab in the message properties dialog box.

The ampersand (&) sign preceding some of the entries represents a variable that Workflow automatically populates when running the process. These variables come from the attributes that you set up earlier.



Describing Functions

A function is defined by the PL/SQL stored procedure or external program that it calls. You use function activities to perform fully automated steps in the workflow process. For example, you might set up a function that calls a procedure that automatically approves or rejects a notification based on the conditions set forth in the procedure. After you design them, you can drag functions from the Navigator window into the process diagram.

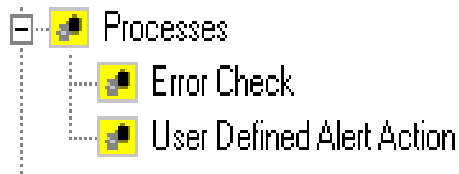


Describing Lookup Types

Lookup types are lists of values that you can use with a variety of activities. For example, you might use an approval lookup type in conjunction with an approve or disapprove notification message.

In addition to use by activities, lookup types can be referenced by attributes and messages in a process to provide a predefined list of values.

A list of common lookup types comes preloaded with Oracle Workflow, and you can create any customized lookup codes that you might need.



Navigator Control Properties

Activity Details Roles Access

Internal Name: ALERT_PROCESS

Display Name: Error Check

Description: Main process implementing periodic alert check for work item

Result Type: <None> Edit

☒ Runnable

Icon: process.ico Browse

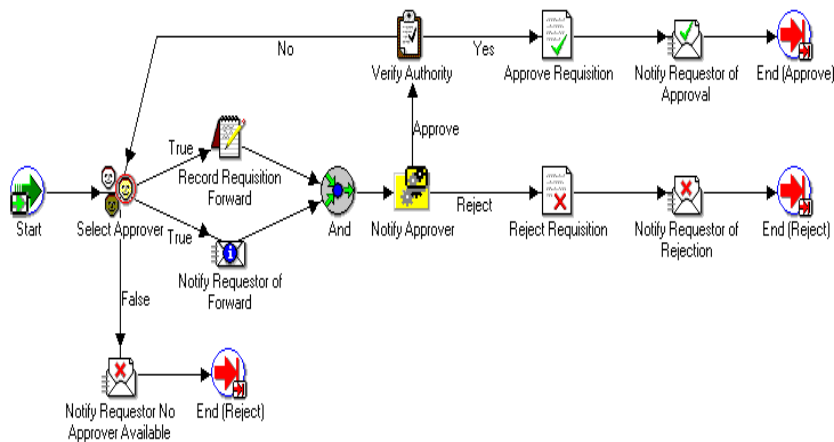
OK Cancel Apply Help

Describing Processes

After you define attributes, messages, notifications, functions, and lookup types, you are ready to define a process in which you can set up your workflow.

With Oracle Workflow, you can define one or more processes. You use the process properties dialog box to define a process. When you define a process, you indicate information such as the process name and the result type of the process.

Process Diagrams



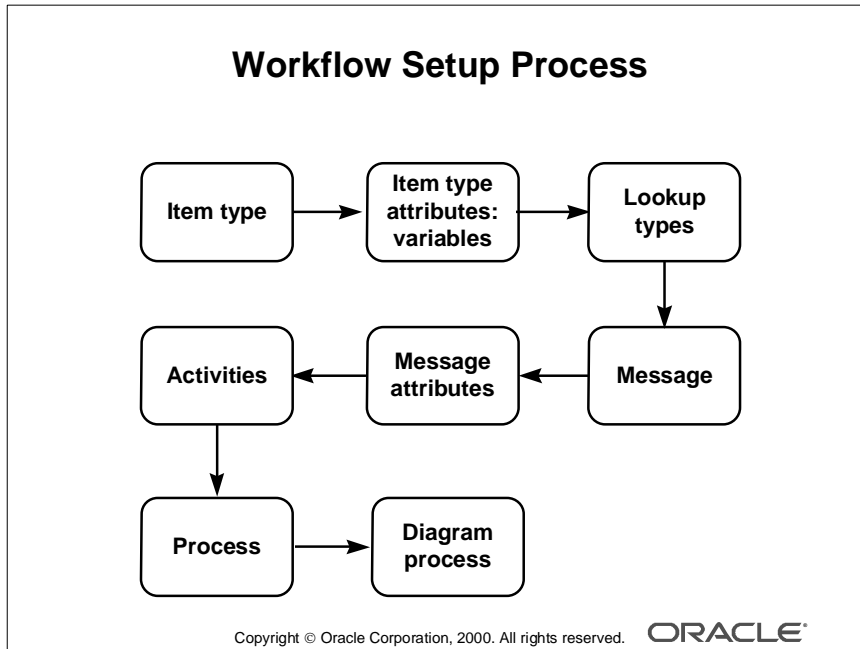
Explaining Process Diagrams

After you define the process, you double-click it to open the process diagrammer. The process diagram window opens as a blank canvas. To define a workflow, you drag the appropriate workflow components from the Navigator onto the canvas. To connect the various components, you select a component and then press the right mouse button and drag the transition line to the component to which you want to connect.

The diagram above shows a completed workflow diagram for a requisition approval process. Each node in the diagram represents a previously defined workflow activity. The choices presented on the transition lines represent lookup codes associated with particular activities. To view specific properties for a component, select the component and then press the right mouse button.

The Start and End nodes are preseeded functions that mark the start and end of a particular process. You can set up multiple endpoints based on the responses associated with a particular activity.

Summary of Workflow Setup Process



Defining the Workflow Setup Process

Although you can define most workflow components in random order, using the following setup steps ensures that you include relevant components in your workflow.

How to Define a Workflow Process

- 1 Define the item type for workflow process.
Note: The item type contains all of the workflow components.
- 2 Define the item type attributes.
- 3 Define lookup types and lookup codes, or select appropriate lookup types that come preseeded with Oracle Workflow.
- 4 Define messages, including the message text.
- 5 Define workflow activities, such as functions and notifications.
- 6 Define the workflow process or processes.
- 7 Diagram the process by double-clicking the workflow process icon.

Note: For specific “how to” instructions, select Help from the Workflow Navigator menu and perform a search on process diagrams.

Practice 15-1 Overview

Practice 15-1 Overview

This practice covers the following topics:

- Defining workflows
- Describing the workflow software
- Describing the workflow setup process

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Overview

In this practice, you answer a series of conceptual questions that reinforce the concepts of Oracle Workflow.

Performing This Practice

For detailed instructions on performing this practice, see Practice 15-1 in Appendix A, “Practices and Solutions.”

Practice 15-2 Overview

Practice 15-2 Overview

This practice introduces you to the Oracle Workflow Builder.

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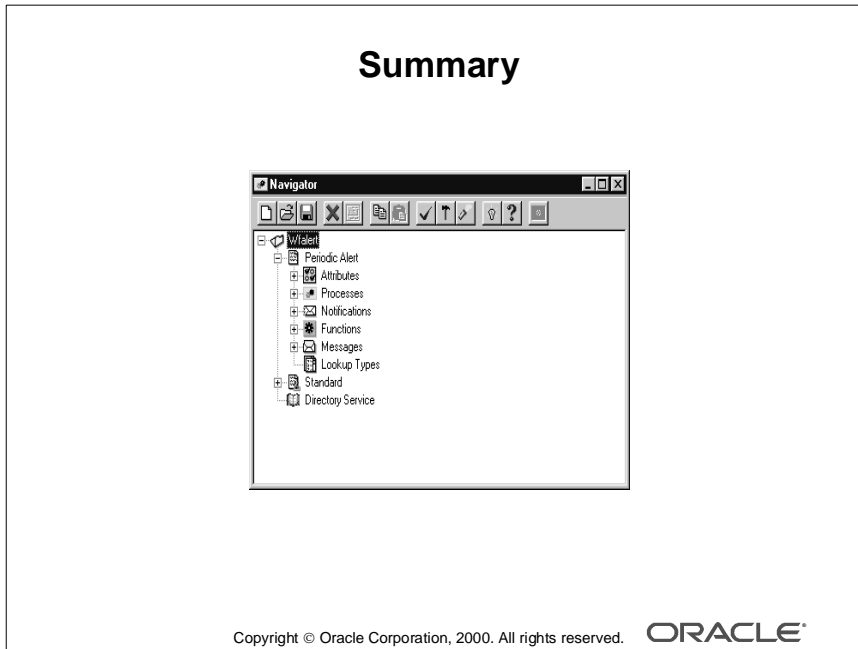
Overview

In this practice, you navigate through the Oracle Workflow Builder, build a simple workflow, and view a preseeded BIS workflow.

Performing This Practice

For detailed instructions on performing this practice, see Practice 15-1 in Appendix A, “Practices and Solutions.”

Summary



Summary

This lesson described Oracle Workflow and explained the components included in the Oracle Workflow Builder.

Examining BIS Alerts and Workflows

Objectives

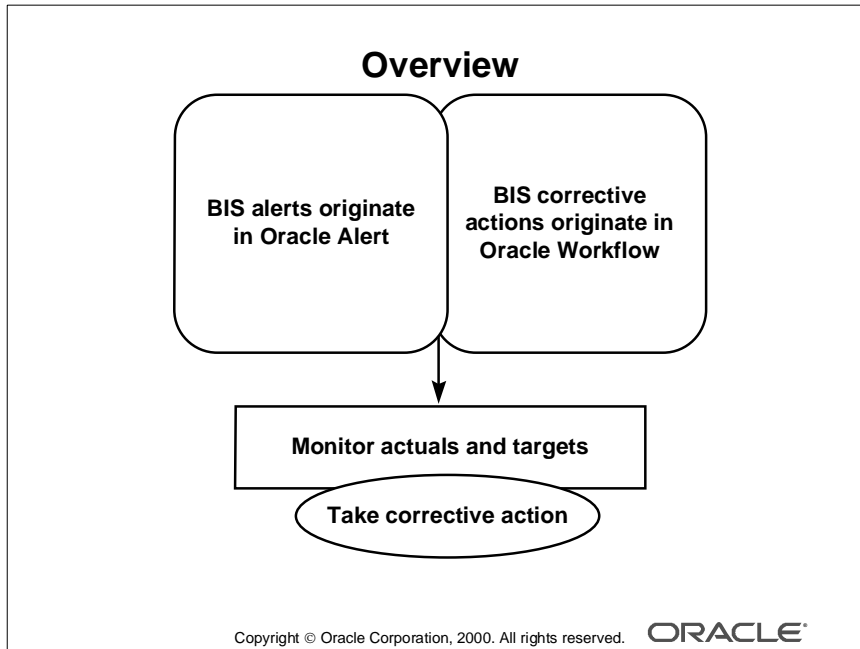
Objectives

After completing this lesson, you should be able to do the following:

- **Describe the BIS alert and workflow process**
- **Describe BIS alert packages and procedures**
- **Explain BIS alerts and workflows on the PHP**
- **Describe the BIS alert and workflow technical process flow**

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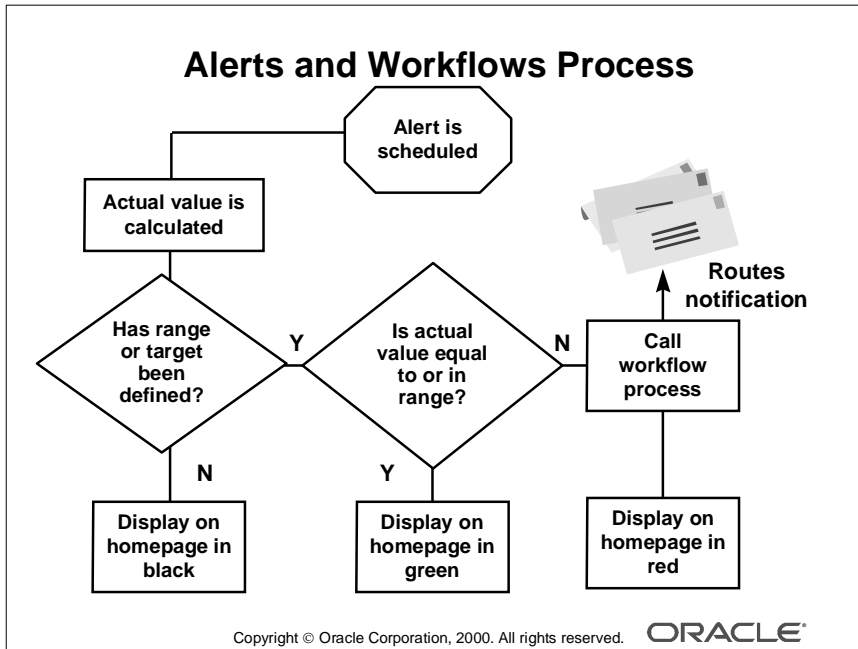
Overview



Importance of This Lesson

The previous lessons discussed each of these products separately. This lesson discusses the relationship between BIS alerts and workflows. Working in conjunction, these alerts and workflows enable you to compare actual business results with targets and to take corrective action when results fall out of range.

BIS Alerts and Workflows



Describing BIS Alerts and Workflows Process

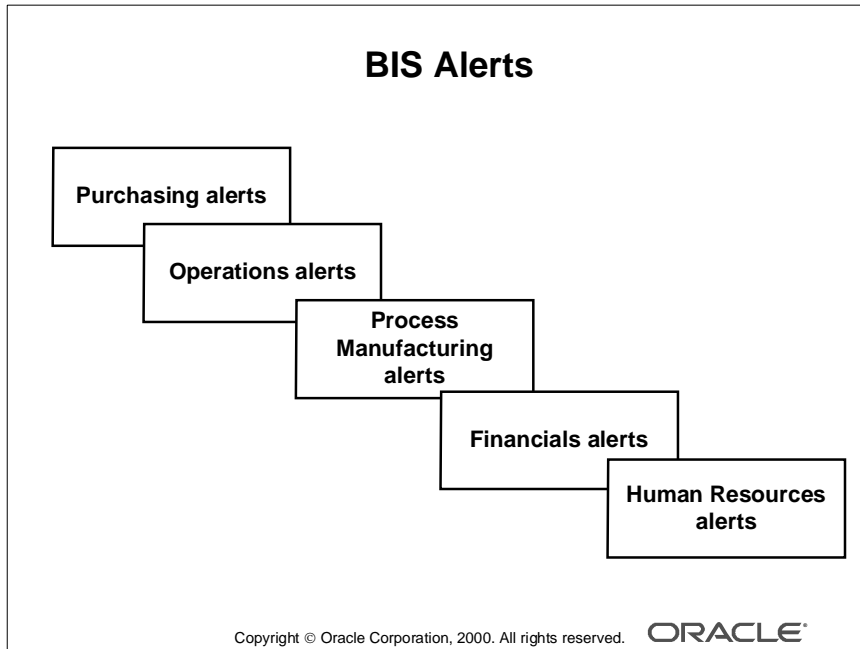
BIS alerts originate in Oracle Alert; BIS corrective actions originate in Oracle Workflow. Following are the steps in the process:

- 1 When an alert is scheduled, the actual values of a performance measure are calculated and saved to the database.
- 2 If no target range exists, the actual value is displayed in black in the Performance Measure region of the personal homepage.
- 3 If targets and ranges have been defined, and the actual value falls within acceptable target ranges, it is displayed in green in the Performance Measure region of the personal homepage.
- 4 If the actual value falls outside specified target ranges, a call is made to a workflow process, which generates and routes a corrective action message, and the actual value is displayed in red.

Technical Note

A null value on the personal homepage indicates that no data exists in the BIS_ACTUAL_VALUES table. Try running the associated alert to rectify this problem.

Alerts and Intelligence Areas



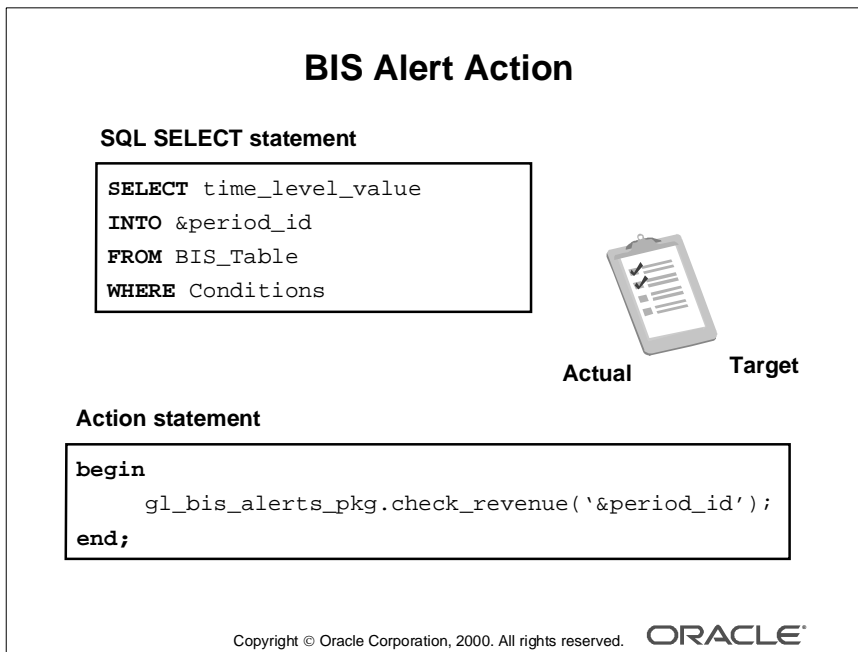
Describing BIS Alerts

The BIS alerts for each intelligence area are listed in the following table:

Intelligence Area	Alert
Purchasing	POA Purchase to Sales Ratio: Current Period-Ops Unit POA Purchase to Sales Ratio: Prior Period-Ops Unit POA Purchase to Sales Ratio: Current Period-All Organization POA Contract Leakage: Current Period-All Organization POA Contract Leakage: Prior Period-All Organization POA Contract Leakage: Current Period-Ops Unit POA Contract Leakage: Prior Period-Ops Unit POA Contract Leakage: Current Period-Organization POA Contract Leakage: Prior Period-Organization
Operations	OE Backorders BIS: Utilization BIS: Production Per Employee BIS: Production Efficiency

Intelligence Area	Alert
	BIS: WIP Inventory Trend Margin by Period Margin by Quarter Margin by Year
Process Manufacturing	BIS: OPM Inventory Turns Whs Year BIS: OPM Inventory Turns Whs Quarter BIS: OPM Inventory Turns Whs Month BIS: OPM Inventory Turns Org Year BIS: OPM Inventory Turns Org Quarter BIS: OPM Inventory Turns Cmp Year BIS: OPM Inventory Turns Cmp Quarter BIS: OPM Inventory Turns Cmp Month
Financials	FII: AR Turnover PTD FII: AR Turnover QTD FII: AR Turnover YTD FII: Days Sales Outstanding PTD FII: Days Sales Outstanding QTD FII: Days Sales Outstanding YTD BIS: GL Latest Closed Period Revenue Alert BIS: GL Previous Open Period Revenue Alert BIS: GL Current Period Revenue
Human Resources	HR Manpower Separations by Month HR Manpower Separations by Quarter HR Manpower Separations by Year

To view specific alerts, using Oracle Applications, log into the Alert Manager responsibility and query on BIS the BIS intelligence area for which you want to view the alert.

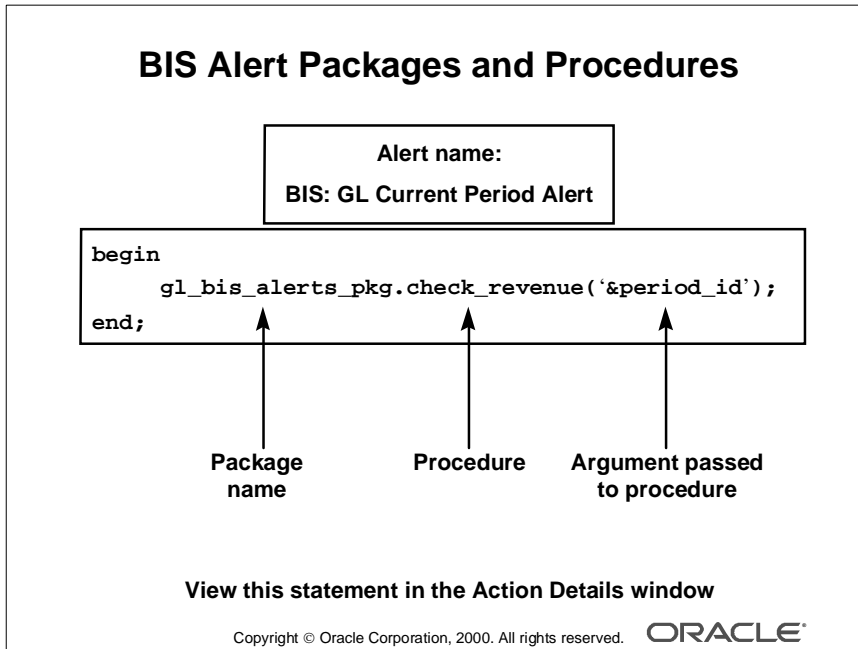


Describing a BIS Alert Action

Because every BIS performance measure should be compared with a target or target range, each performance measure must be associated with an alert.

Most BIS alerts are created in a similar fashion. In the SQL SELECT statement of BIS alerts, a variable is retrieved from a table, and this variable is then passed to the procedure in the alert action. The WHERE clause of the SELECT statement specifies conditions on which the variable should be retrieved. The procedure associated with the alert then calculates the actual value and inserts the result into the BIS_ACTUAL_VALUES table.

BIS Packages and Procedures



Describing BIS Alerts Packages and Procedures

The example illustrates a typical alert package and the procedure that is associated with the BIS alert: GL Current Period Alert. The purpose of this alert is to check revenues.

In this example, written in PL/SQL, the `gl_bis_alert_pkg` package calls the `check_revenue` procedure. This procedure checks and retrieves revenues for a specific time period determined by the `&period_id` variable passed to it.

The `&period_id` variable is the INTO variable populated by the SELECT statement. Passing this variable to the `check_revenue` procedure enables the package to check revenues for a specific date. The procedure then calculates revenues and compares the result to the target. If revenues fall out of target ranges, the procedure calls the workflow process, FII BIS Corrective Action Notification, associated with the target.

Workflow then sends a notification to the users who have the responsibility associated with that target level.

Technical Note

Recall that when you create and save a target to the database, you also assign the corrective action workflow to the associated target level.

BIS Packages and Procedures

`bis_util.strt_wf_process`

`bis_postactual.post_actual`

`bis_postactual.get_trgt_level_orgs`

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Standard BIS Packages and Procedures

Although each intelligence area uses packages and procedures related directly to the intelligence area, BIS intelligence areas also include the following standard BIS packages and procedures:

Package Name	Procedure Name	Description
<code>bis_postactual</code>	<code>post_actual</code>	Inserts actual values into a BIS table called <code>BIS_ACTUAL_VALUES</code> table
<code>bis_postactual</code>	<code>get_trgt_level_orgs</code>	Retrieves all organizations against which to post actual values
<code>bis_util</code>	<code>strt_wf_process</code>	Starts the workflow process

BIS Alerts Example

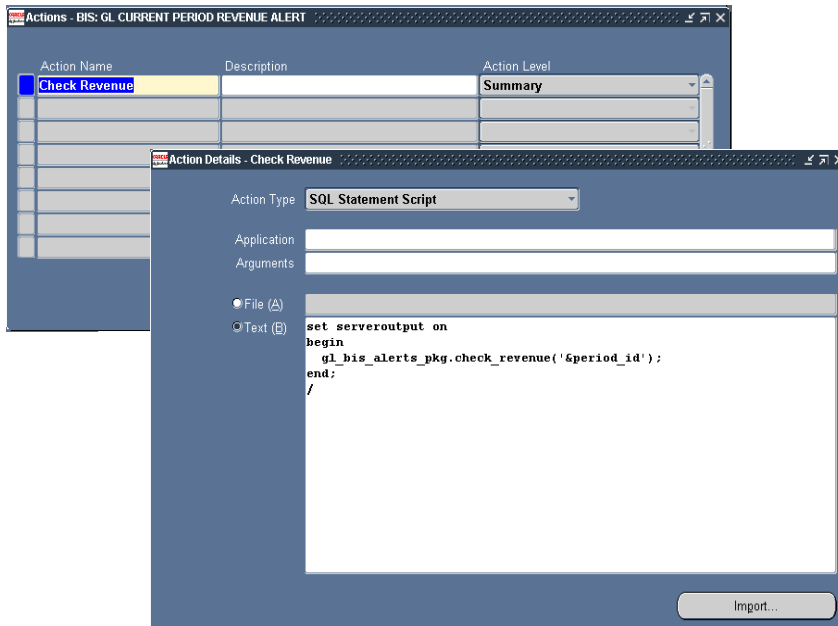
The screenshot shows the 'Alerts' configuration window. The 'Application' is 'Financials Intelligence' and the 'Name' is 'BIS: GL CURRENT PERIOD REVENUE ALERT'. The 'Description' is 'GL current period revenue alert' and it is 'Enabled'. The 'Periodic' tab is selected. Under 'Periodic Details', the 'Frequency' is 'On Demand'. The 'Keep' value is '0' Days. The 'Select Statement' is a SQL query that selects 'trg.time_level_value_id' into '&period_id' from 'bisbv_target_levels t1' and 'gl_periods per' where 't1.target_level_short_name' is like 'FIIGLREV%' and 'trg.target_level_id' equals 't1.target_level_id' and 'per.period_set_name' equals 'substr(trg.time_level_value_id, 1, instr(trg.time_level_value_id, '+') - 1)' and 'per.period_name' equals 'substr(trg.time_level_value_id, ...'. The 'Run' button is highlighted.

Example of a BIS Alert

The alert shown in the example is called the BIS: GL Current Period Revenue Alert. The SQL statement of this alert retrieves the `trg.time_level_value_id` column from the `bisbv_target_levels` view (or table) based on the conditions stated in the statement's WHERE clause.

After retrieving this column into the `&period_id` variable, it is passed to the package shown on the next page.

Note: You access the windows shown on the following page by clicking the Action button.



Example of a BIS Alert (continued)

The Actions window shows that only one action, called Check Revenue, will be performed for this alert. The Action Details window shows the details for this action. The type of action performed for this alert will be a SQL statement script that contains a package that performs the following actions:

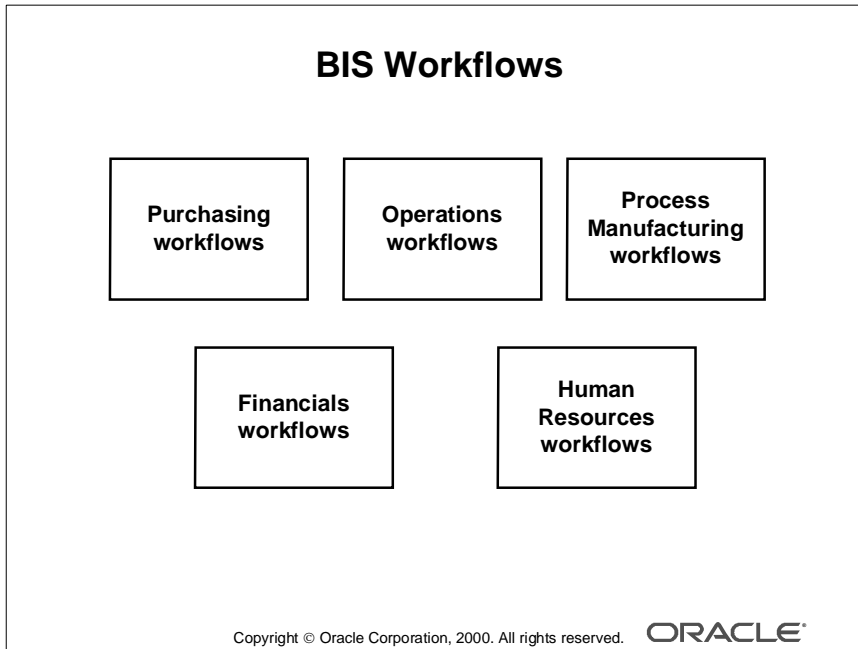
A call is made to the, `gl_bis_alerts_pkg.check_revenue`

(`'&period_id'`) procedure, which includes passing the argument `period_id`.

The procedure calculates the revenue for the specified time periods and then compares these revenues to the appropriate performance measure target. If the actual values fall out of range, the procedure calls the workflow process that is associated with performance measure.

Workflow then sends a notification to the users that have responsibility for that target.

BIS Workflows



Describing BIS Workflows

Common BIS workflow intelligence areas are listed in the following table:

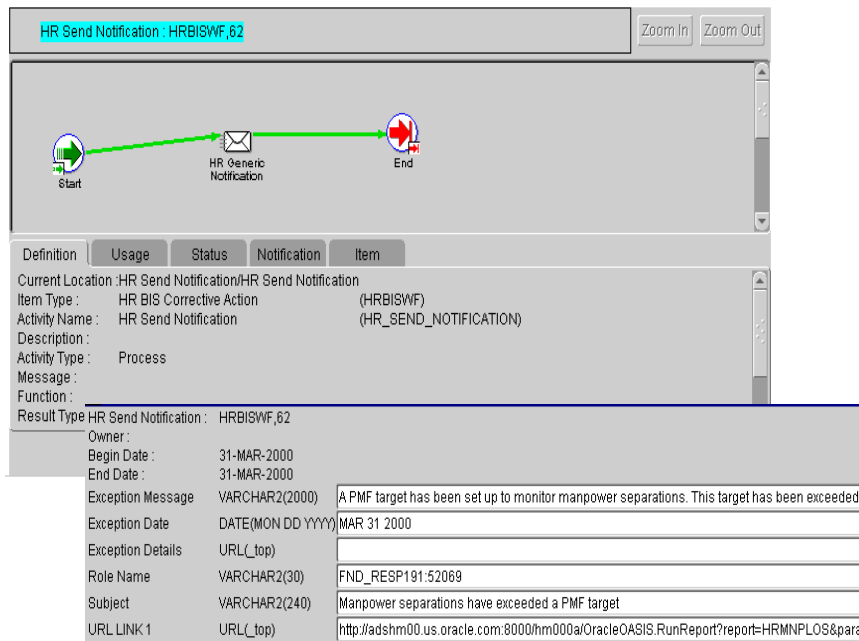
Intelligence Area	Workflow
Purchasing	POA_SEND_PURCHASE_TO_SALES_NOTIFICATION POA_SEND_CONTRACT_LEAKAGE_NOTIFICATION
Operations	OE_BACKORDER_SEND_NOTIFICATION WIP_SEND_NOTIFICATION MRP_PLAN_PERF
Process Manufacturing	PMI_SEND_NOTIFICATION
Financials	FII__SEND_NOTIFICATION FII_REVENUE_NOTIFICATION
Human Resources	HR_SEND_NOTIFICATION

Note: Remember that when you set up target levels, you also select the appropriate BIS workflow.

BIS corrective actions are preseeded. You can view BIS workflows through the Oracle Workflow Builder and then connect to the appropriate BIS database.

To view BIS corrective action workflows from the list of item types, select OBIS Corrective Actions.

BIS Workflow Example



Example of a BIS Workflow

The workflow in the example represent the HR_SEND_NOTIFICATION workflow. All BIS workflows look similar to this example. To view the attributes associated with a node on the workflow, select the node for which you want to view attributes, and then click the Attribute button (which is hidden in the example) at the bottom of the workflow diagram window.

This example shows the attributes associated with the Notification node.

How to View This Example

- 1 Select Workflow from the Self-Service PHP navigation menu
- 2 Select Find Processes
The Find Processes? window opens.
- 3 In the Item Type field, select HR BIS Corrective Action from the list of values and click the Find button (located at the bottom of the window).

How to View This Example (continued)

- 4** Select the hyperlink process name for the workflow that you want to review.

The Notifications List? window opens.

- 5** Click the View Diagram button to view the workflow.

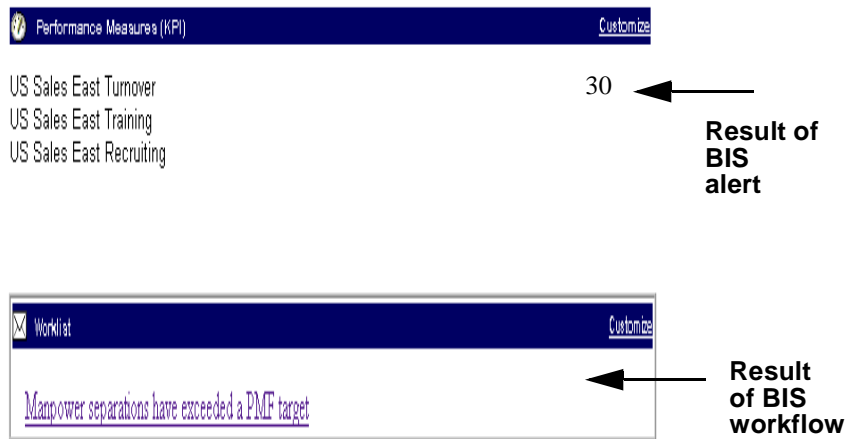
The workflow diagram appears.

- 6** Click the various tabs in the diagram to view the workflow details.

Note: Select View Notification Rules to view the routing rules associated with a specific notification. You can also use this option to create new notification rules.

You can view notification rules for a BIS notification. A notification rule addresses the routing of a notification. For example, a notification rule might indicate that you want to forward all notifications to a certain user.

BIS Alerts, Workflows, and the PHP



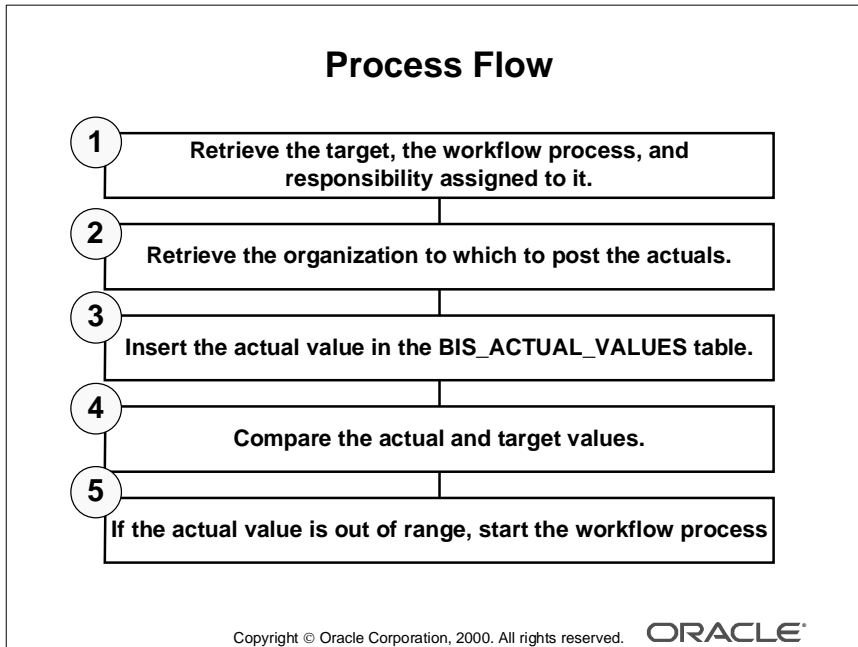
Explaining BIS Alerts and Workflows on the PHP

BIS alerts and workflows do not actually appear on the PHP. However, the results of alerts and workflow processes appear on the PHP in the following regions:

- Performance Measures
- Notifications

The color-coded actual value calculated by the alert appears in the Performance Measures region. The BIS corrective action notification (created in Oracle Workflow) appears in the Notifications region.

Alerts and Workflows Technical Process Flow

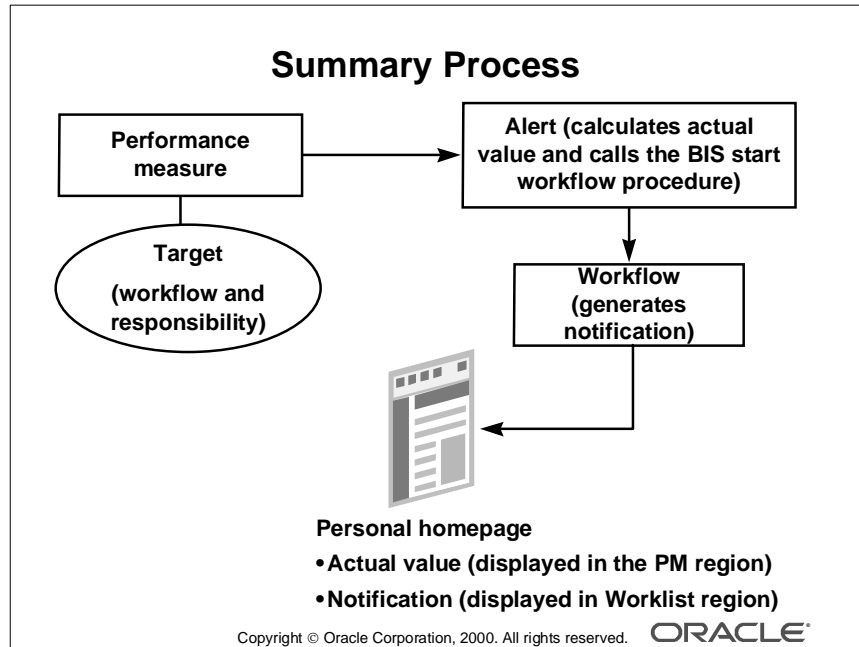


Describing the Alerts and Workflows Technical Process Flow

The diagram shown on the slide and the following discussion describe the BIS alerts and workflows process and include the table and procedure names associated with the each step.

- 1 The alert procedure retrieves the performance measure target, the workflow process, and responsibility assigned to it.
- 2 The `bis_post_actual.post_actual` procedure retrieves the organization to which it posts actuals.
- 3 The alert procedure inserts the actual value in the BIS_ACTUAL_VALUES table that is associated with the performance measure.
- 4 The procedure compares the actual and target values.
- 5 If the performance measure actual is out of range, the `bis_util.strt_wf_process` procedure calls the workflow process.

BIS Alerts, Workflows, and the PHP



Alerts, Workflows, and the PHP Summary Process

A performance measure is associated with a target and an alert. When you define the target, you also indicate the BIS workflow and the responsibility to which you want the notification routed.

Depending on the alert schedule, the alert calculates and posts the actual value. If the value falls outside specified targets, the alert calls the workflow process, which generates the notification.

Process Results The results of this process are displayed on the personal homepage in two regions: the Performance Measures region and the Worklist region. The actual value is displayed in the Performance Measures region, and the corresponding notification appears in the Worklist region.

Practice 16-1 Overview

Practice 16-1 Overview

This practice covers the following topics:

- Describing BIS alerts
- Describing BIS alert packages and procedures
- Describing BIS corrective actions

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Overview

In this practice you answer a series of conceptual questions about BIS alerts.

Performing This Practice

For detailed instructions on performing this practice, see Practice 16-1 in Appendix A, “Practices and Solutions.”

Practice 16-2 Overview

Practice 16-2 Overview

This practice covers the following topics:

- Examining BIS alerts
- Examining BIS workflows

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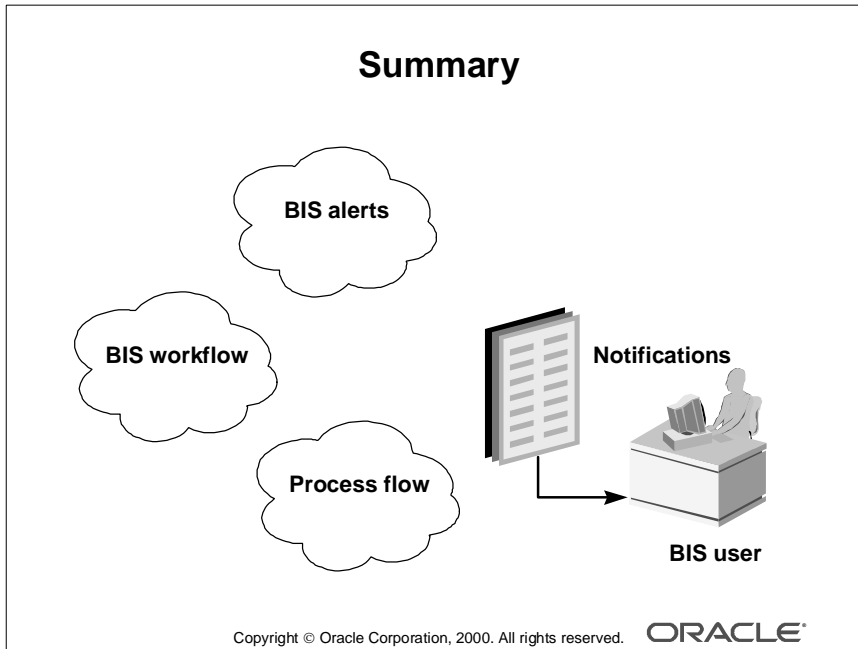
Overview

In this practice, you examine BIS alerts and workflows.

Performing This Practice

For detailed instructions on performing this practice, see Practice 16-2 in Appendix A, “Practices and Solutions.”

Summary

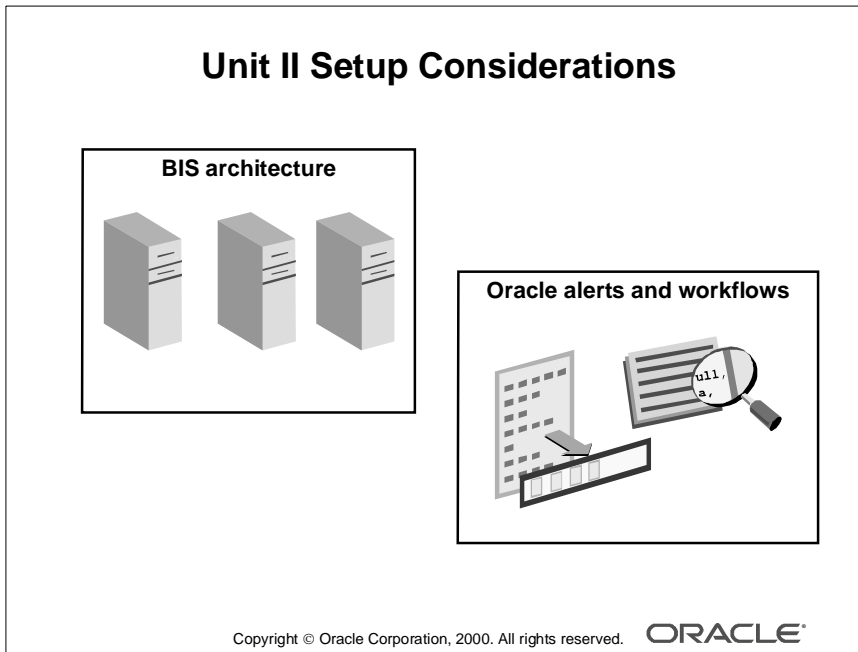


Summary

This lesson explained Oracle alerts and workflows within the BIS context. It also explained how these two products work in conjunction and how the results of their processes appear on the BIS personal homepage.

Unit II Setup Considerations

Unit II Setup Considerations



Setup Considerations

When setting up the BIS components discussed in Unit II, consider the following information:

BIS Architecture

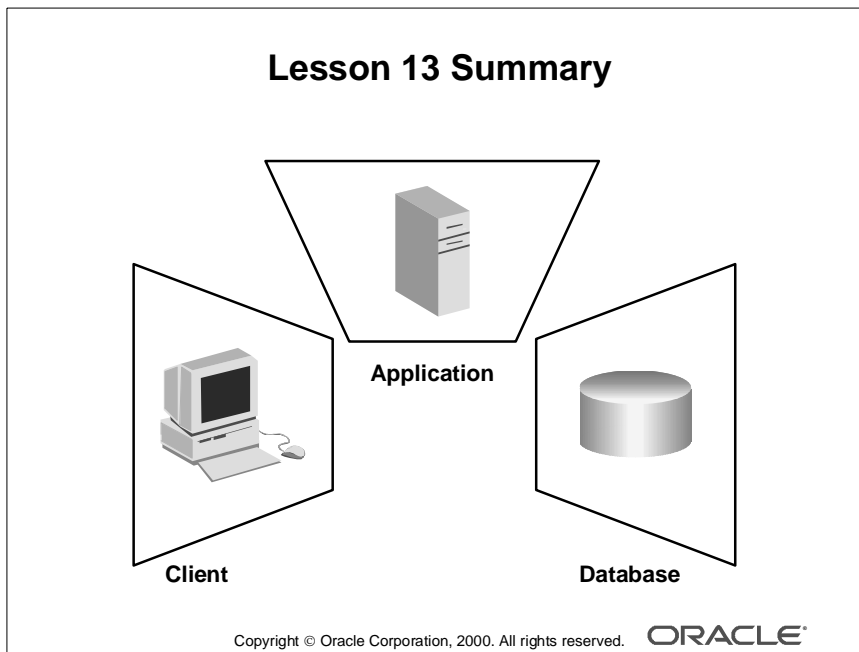
- Become familiar with the BIS architecture configuration for your company or client in relation to your BIS implementation efforts.
- Work with your BIS technical consultant to ensure that all architectural components are in place.

Oracle Alerts and Workflows

- Run the alerts to ensure that they return data.
- Schedule the periodic alerts and set a frequency applicable to the client's environment.

Unit II Summary

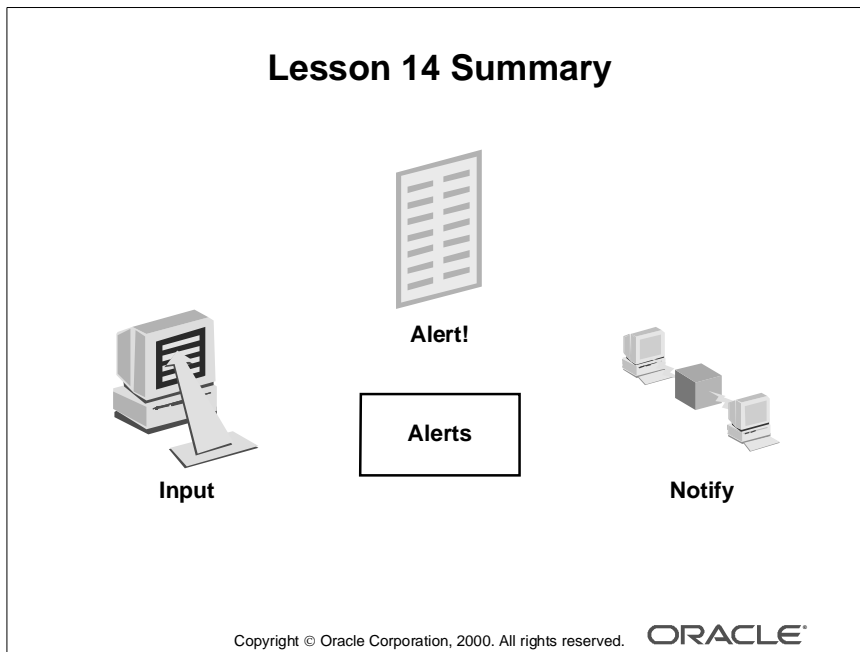
Unit II Summary



Summary

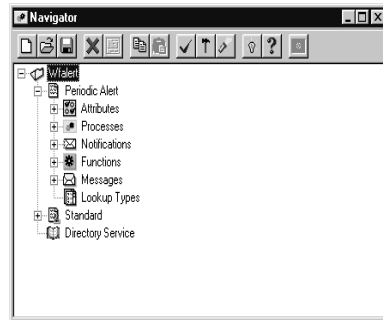
Lesson 13, “Describing the BIS Architecture,” described the three-tiered architectures in which BIS is installed. The three tiers include the following:

- The client or desktop tier, which includes the Web browser used to access various BIS components, such as intelligence reports
- The application tier, which includes the Web server that houses the BIS product
- The database tier, which contains all of the OLTP (online transaction processing) tables and views

**Summary (continued)**

Lesson 14, “Describing Oracle Alerts,” described how Oracle alerts work within the BIS product to derive actual values, compare these values against predefined targets, and then call a workflow routine if some type of action needs to be taken.

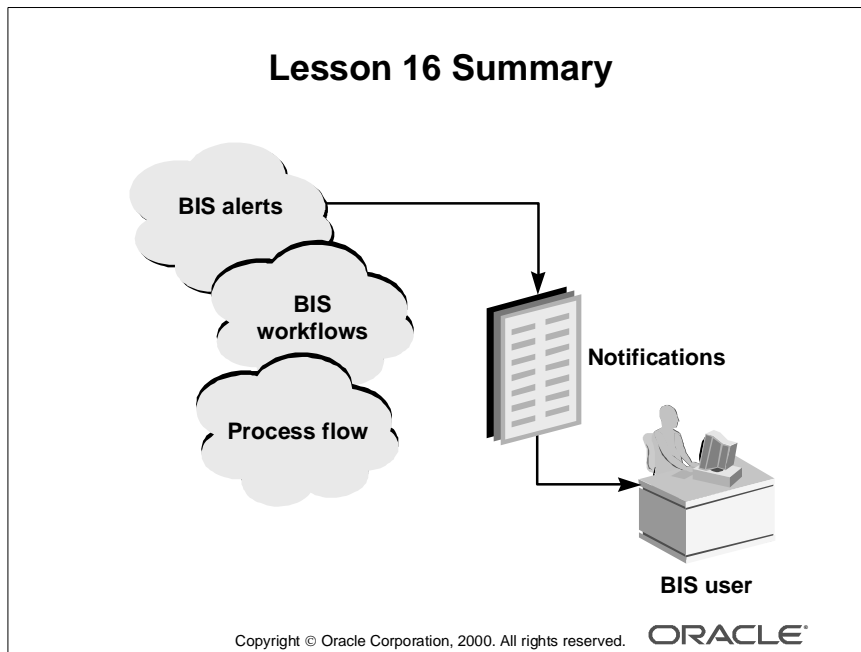
Lesson 15 Summary



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Summary (continued)

Lesson 15, “Describing Oracle Workflows,” explained the components of Oracle Workflow and the process diagrams in which they exist.



Summary (continued)

Lesson 16, “Examining BIS Alerts and Workflows,” explained how the alerts and workflow process work together in BIS to verify actual values and then alert BIS users if the actual value falls outside a defined tolerance range.

Unit III

BIS Implementation

**Unit III Introduction:
BIS Implementation**

Objectives

Unit III Objectives

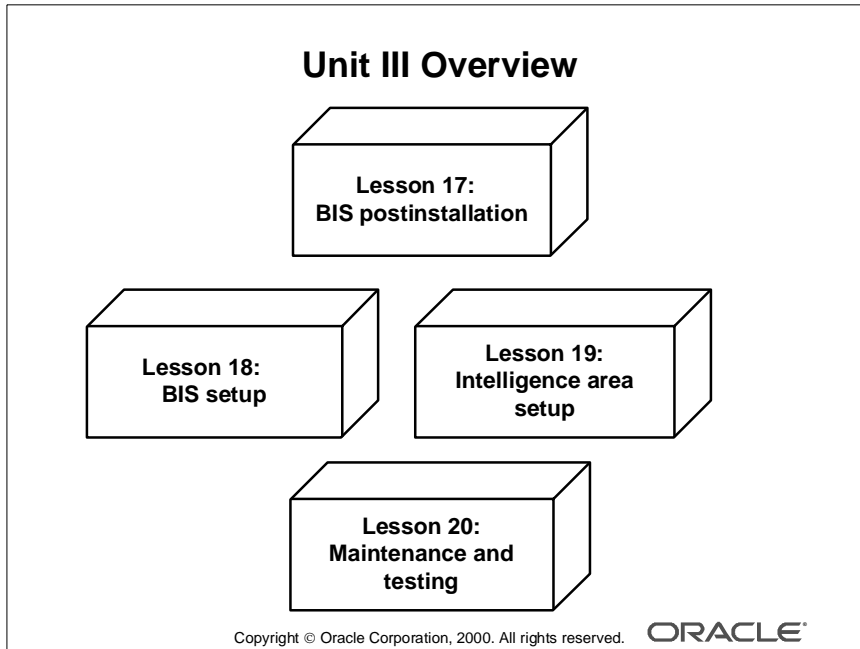
After completing this unit, you should be able to do the following:

- **Describe BIS postinstallation requirements**
- **Describe BIS setup**
- **Describe intelligence area setup**
- **Describe BIS maintenance requirements**

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Overview

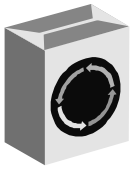


Importance of This Unit


This unit describes the setup requirements necessary to implement BIS, release 11*i*. Lesson 17 explains BIS postinstallation requirements. Lesson 18 describes the setup required for the BIS application, and Lesson 19 describes the setup required for each intelligence area. Lesson 20 describes several of the requirements necessary to maintain BIS.

Unit Integration

Unit III Integration



Oracle Business Intelligence System



- **System Administration application**
- **BIS superuser**
- **Product group superusers**

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Unit III Integration

This unit explains how to implement BIS. When you set up BIS, you must access the following:

- Oracle System Administration application
- BIS superuser responsibility
- Product group superuser responsibilities

**Describing BIS
Postinstallation
Requirements**

Objectives

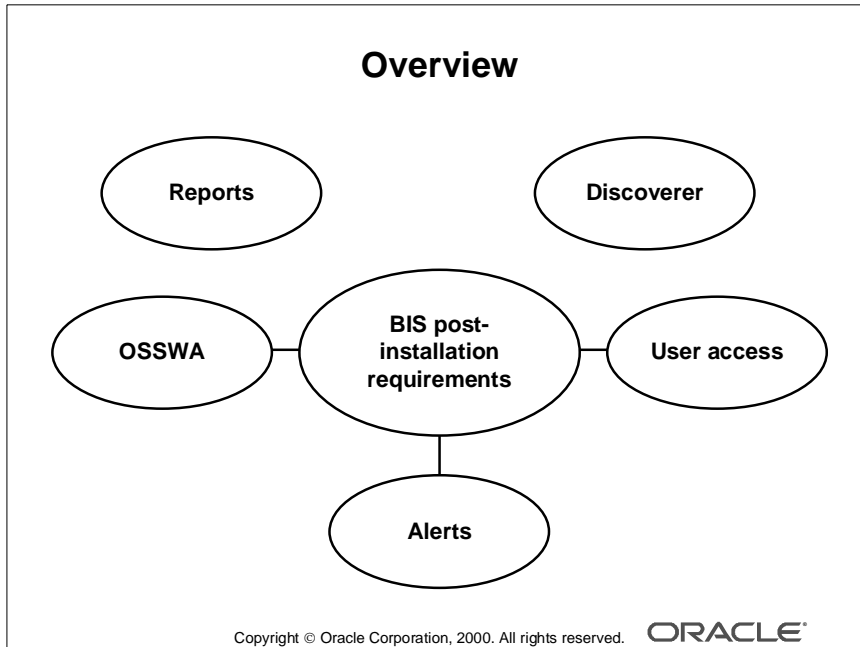
Objectives

After completing this lesson, you should be able to do the following:

- **Describe BIS postinstallation steps**
- **Describe report postinstallation steps**
- **Describe Discoverer postinstallation steps**
- **Describe Oracle Self Service Web Applications postinstallation steps**
- **Describe user access setup**
- **Describe postinstallation testing steps**

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Overview



Importance of This Lesson

This lesson explains BIS postinstallation requirements. After the BIS application is installed, you must perform a variety of postinstallation steps for the following areas:

- BIS reports
- Discoverer analysis workbooks
- User access to BIS
- BIS alerts
- Setup of Oracle Self Service Web Applications

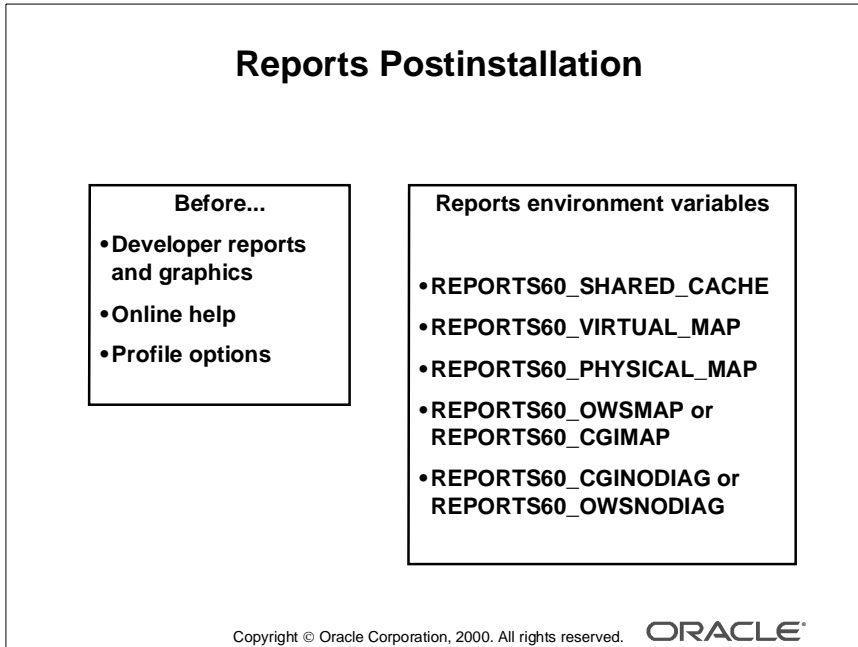
This lesson also describes the testing that you should perform to verify that you correctly performed the postinstallation steps.

For more information about performing BIS postinstallation steps, refer to the chapter titled “Postinstallation for the Oracle Business Intelligence System” in *Oracle Business Intelligence System Implementation Guide, Release 11i*.

Technical Note

This lesson presents the Oracle recommendation for installation. Installations for individual client sites might vary.

Reports Postinstallation Tasks



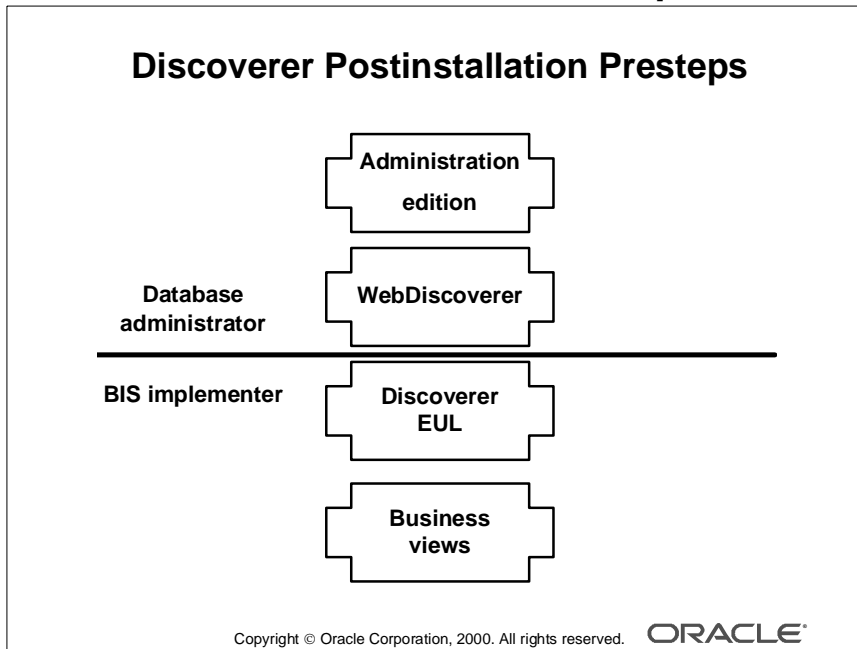
Describing Reports Postinstallation Tasks

Before performing the reports postinstallation steps, you must have already installed the Reports and Graphics components of Oracle Developer, using the instructions provided in the *Installing Oracle Applications, Release 11i* guide. You must also have installed online help, as well as defined values for profile options. After completing these steps, you verify the reports environment variables to finish the reports postinstallation tasks. The table on the next page briefly describes these variables.

Describing Reports Postinstallation Tasks (continued)

Environment Variable	Description
REPORTS60_SHARED_CACHE	Specifies whether the location of the reports server cache is shared with the Web server's cache
REPORTS60_VIRTUAL_MAP	The virtual directory where the Web server looks for the report output
REPORTS60_PHYSICAL_MAP	The physical location where the Web Server looks for the report output
REPORTS60_OWSMAP or REPORTS60_CGIMAP	For the Reports Web CGI or the Reports Web cartridge. Defines fully qualified file name and location of the RWCG160 or RWOWS map files (if map file configuration is used)
REPORTS60_CGINODIAG or REPORTS60_OWSNODIAG	For the Reports Web CGI or the Reports Web cartridge. When defined, it disables all debugging/diagnostics output, such as help and show map, from RWCG160 or RWOWS. This is a very useful variable for debugging, but it should not be set in secured environments because diagnostic output might display user passwords for the applications user schema.

Discoverer Postinstallation Presteps

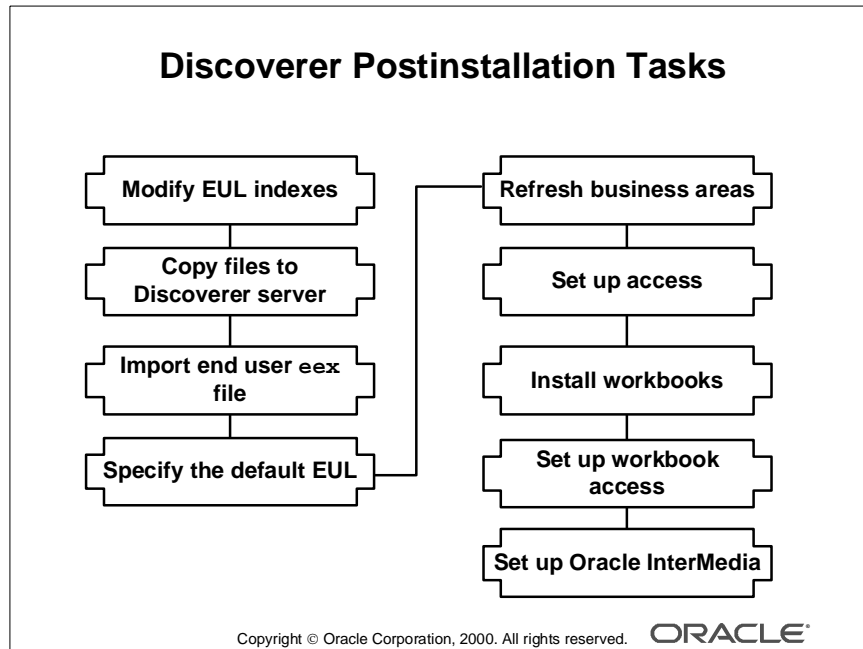


Describing Discoverer Postinstallation Presteps

Before performing Discoverer postinstallation steps, you must have already completed the following:

- Installed the Oracle Discoverer Administration Edition
- Installed the Oracle WebDiscoverer
- Installed the Oracle Discoverer End User Layer (EUL)
- Generated the appropriate business views

Discoverer Postinstallation Tasks



How to Make Discoverer Functional for BIS Use

You must perform the following postinstallation tasks to make Discoverer functional for BIS use.

Note: These tasks assume that your DBA has copied the appropriate Discoverer files from a staging directory to the Discoverer directory. Your DBA should also provide you with the appropriate Discoverer username and password.

- 1 Log into SQL*Plus with the appropriate EUL user ID and password and execute the following script:

```
$ BIS_TOP/admin/SQL/BISALTIN.sql
```

This command modifies the EUL owner's indexes. Modifying these indexes alters them for use by the BIS application.

- 2 Log into the Discoverer Administration Edition and perform the following:
 - Create the EUL.
 - Import the BIS eex file from `$AU_TOP/discoverer/<language>/biseul.eex`.

This step creates the BIS EUL.

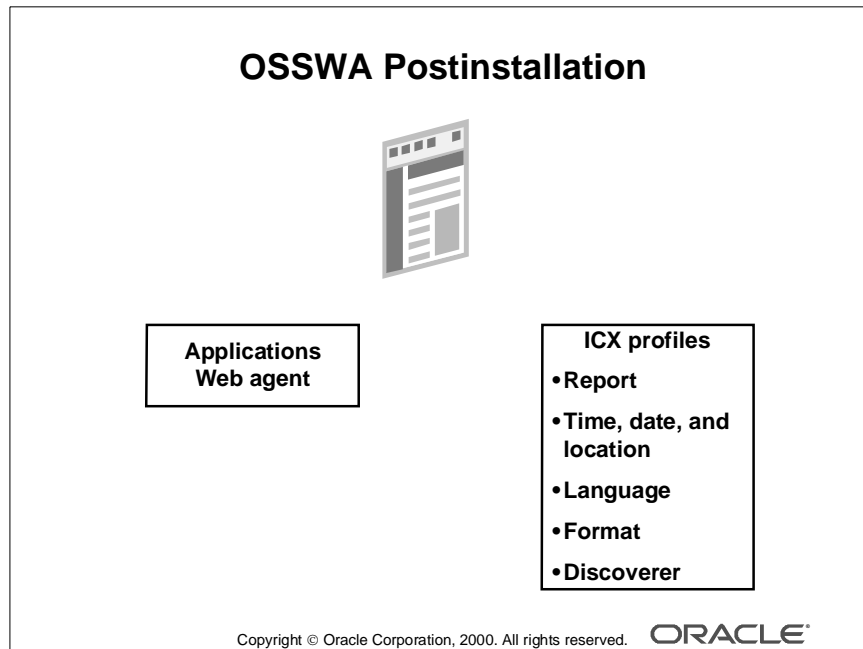
- 3 Specify the EUL that you created in step 2 as the default EUL.

How to Make Discoverer Fractional for BIS Use (continued)

- 4** From the File menu, select Refresh to refresh the BIS business areas.
This step synchronizes the information in the Discoverer EUL with the generated business views.
- 5** Set up access to the BIS business areas and workbooks
 - Grant access to the business areas: (M) Tools—>Security
 - Grant access to the Discoverer User Edition: (M) Tools—>Privileges
- 6** Log into the Discoverer User Edition, using the appropriate BIS username and password.
 - Save the workbooks from the file system to the database.
 - Grant access to the workbooks using the workbook-sharing option under the User Edition File menu.
- 7** Log back into SQL*Plus and execute the following script:

```
$ BIS_TOP/admin/SQL/bispbvi.sql
```
- 8** Invoke the Discoverer User Edition and save the Discoverer workbooks related to BIS. In this step, you save the BIS workbooks to the database so that they can be accessed by WebDiscoverer—which is the Discoverer component that end users access from the BIS personal homepage to view workbooks and perform additional analysis.
- 9** Set up access to the BIS workbooks. In this step, you need to select responsibilities and assign access to BIS workbooks.
- 10** Set up EUL indexes. In this step, you create indexes for the InterMedia indexes that reside in Discoverer folders, which reside in the EUL.

OSSWA Postinstallation Tasks



Describing OSSWA Postinstallation Tasks

Postinstallation tasks for the Oracle Self Service Web Applications (OSSWA) homepage include setting up a variety of profiles for the following items:

- Reports
- Time, date, locations
- Languages
- Formats
- Discoverer options

For example, one reports profile embeds a graphics HTML pointer in the report output so that the report can display standard image files. Another option, a time-related profile option, specifies the maximum number of pages hit per session.

OSSWA profile options include the prefix ICX. For example, the profile for option for the time limit connection is ICX: Limit Connect.

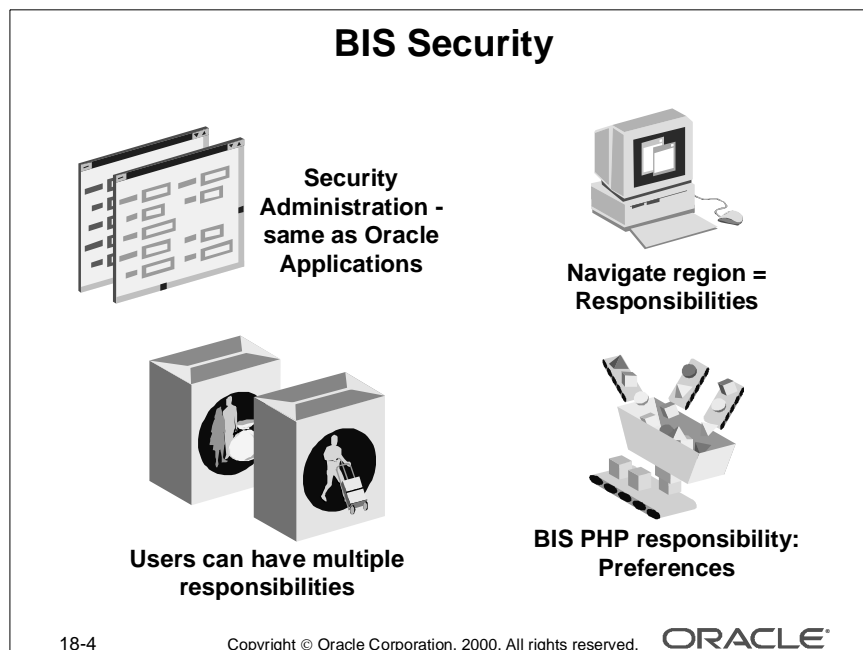
Oracle Applications System Profiles

The following table provides a brief description of the OSSWA profile options that you must set up in the Oracle Applications System Administration system.

Profile	Description
Applications Web Agent	Identifies the location of the Web agent
ICX: Report Images	This value is embedded into the HTML report output so that reports can include standard image files
ICX: Report Launcher	Identifies the reports server that will run reports and produce HTML output
ICX: Report Link	This value is embedded into the HTML report output so that reports can include drilldown links to other reports. This is similar to the value that you enter when you modify the signon window.
ICX: Report Server	Provides the name of the reports server service (REPSERV) that you created on the reports server
ICX: Limit Connect	Determines the maximum number of page hits per session
ICX: Limit Time	Determines the maximum number of hours that a user can be logged onto per session
ICX: Report Format	Determines the report output format. This value must be set to HTML.
ICX: Report Cache	Identifies the virtual directory for the report cache at the HTTP listener
ICX: Language	Determines the default language. This must be the same as ICX: Date Language.
ICX: Date Language	Determines the default language in which dates are displayed. This must be the same as the value in ICX: Language.
ICX: Date Format Mask	Determines the date format mask to use
ICX: Numeric Characters	Determines the characters to use to delimit numbers
ICX: Territory	The geographical area
ICX: Discoverer Launcher	Identifies the Discoverer server that runs reports and produces HTML output
ICX: Discoverer End User Layer Schema Prefix	This combination with the language code makes up the EUL owner at run time. For example, if your EUL owner is EUL_US, then your ICX_DEFAULT_EUL profile should be EUL. Note: The language code to derive the complete EUL owner is added automatically.

Consult the *Oracle Self Service Web Applications Implementation Manual* for detailed instructions on setting up these OSSWA profile options. For a list of each option and a brief description and example of the option, consult the *Implementing Oracle Business Intelligence System, Release 11i* guide.

User Access Postinstallation Tasks



Explaining BIS Personal Homepage Security

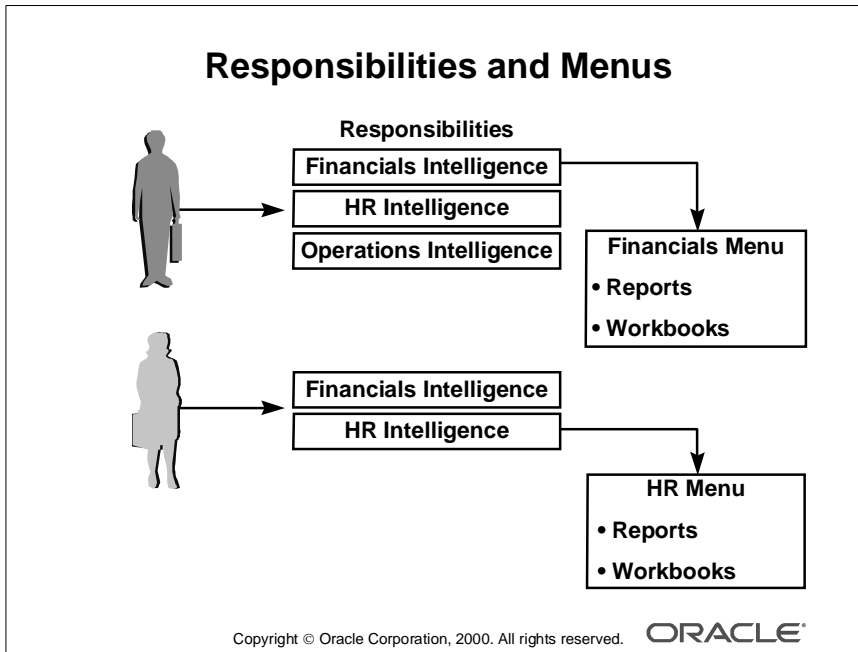
The BIS personal homepage (PHP) security provides you the same secure access that you get with Oracle Applications security. You administer BIS security through the System Administrator responsibility in Oracle Applications.

As in to Oracle Applications, users can have multiple responsibilities, such as Financials Intelligence, Operations Intelligence, and so on. The responsibilities to which a user has access appear in the Navigate region of the user's personal homepage.

Access Restrictions Only users granted the Preferences responsibility have access to BIS intelligence areas. Only those users with access to the Performance Management Framework (Full Access) can set up performance measures and related targets. Users with access to the Performance Management Framework (Targets Access) can set up targets and tolerance ranges applicable to predefined performance measures.

Technical Note

The intelligence areas, such as Financials, Operations, and Human Resources, come preseeded with BIS.



Defining Users

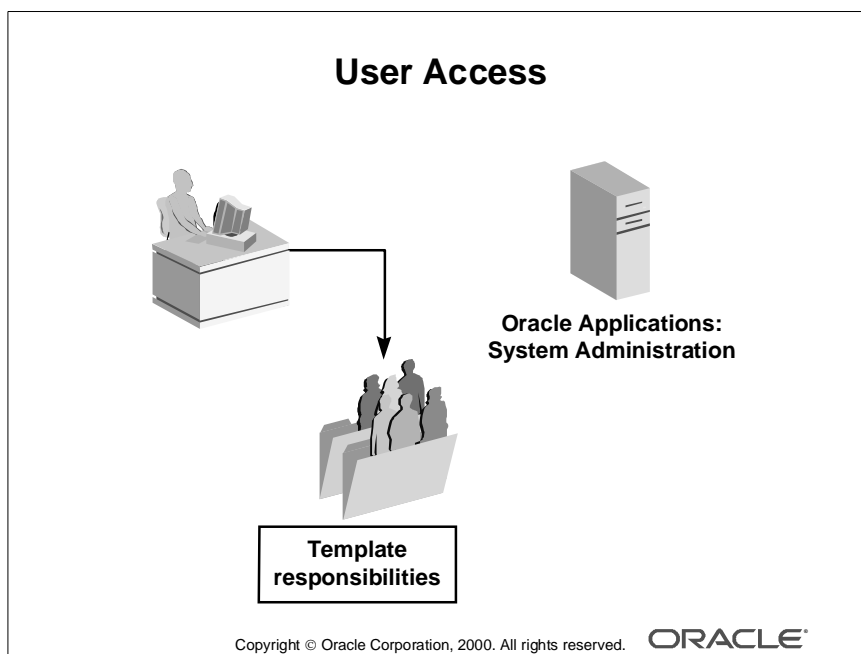
Before they can access their PHP, users must be granted access to specific responsibilities in Oracle Applications. Before you create users, you set up the appropriate responsibilities and menus for user access.

Responsibility Features Consider the following information when setting up users:

- A user can have many responsibilities. For example, a user might have both Financials and Operations responsibilities.
- Granting access to a responsibility enables access to its related menus and submenus.
- You can create new responsibilities and menus based on preseeded ones.

Menus On the BIS PHP, menus represent the links to various intelligence areas, reports, and workbooks. Standard menus come preseeded with BIS; however, using the System Administrator responsibility, you can set up custom menus according to the user's needs.

For detailed instructions on setting up users, responsibilities, and menus, consult the *Oracle System Administration Guide, Release 11i*.



Defining Users (continued)

When you grant users access to BIS, you can create your own responsibilities, or you can use one of the following preseeded template responsibilities:

Responsibility	Access Description
Financials Intelligence	Provides access to BIS financials reports and workbooks
Operations Intelligence	Provides access to BIS operations reports and workbooks
Human Resources Intelligences	Provides access to BIS human resources reports and workbooks
Purchasing Intelligence	Provides access to BIS purchasing reports and workbooks
Process Manufacturing Intelligence	Provides access to BIS process manufacturing reports and workbooks
Performance Management Framework (Full Access)	Provides access to performance measure and target forms
Performance Management Framework (Targets Access)	Provides access to the target form
Business Views Setup	Provides access to business views setup
BIS Superuser	Provides access to flexfield mapping territory hierarchies, regions, and area setup (Geography dimension)
Preferences	Provides access to configurable homepage regions

Technical Note

Before creating custom responsibilities, consider using the BIS preseeded responsibilities.

The screenshot shows the 'Users' window in Oracle Business Intelligence. The 'User Name' field is 'PBLUER' and the 'Description' is 'BIS System Administrator'. The 'Password Expiration' section has radio buttons for 'Days', 'Accesses', and 'None'. The 'Effective Dates' section has 'From' and 'To' date pickers, with 'From' set to '01-JAN-1998'. Below these are tabs for 'Responsibilities' and 'Securing Attributes'. The 'Responsibilities' tab is active, showing a table of assigned responsibilities.

Responsibility	Application	Security Group	Effective Dates
			From To
@Workflow User	Application Object L	Standard	01-JAN-1998
@Workflow Administrator	Application Object L	Standard	01-JAN-1998
System Administrator	System Administrati	Standard	01-JAN-1998
Alert Manager	Oracle Alert	Standard	01-JAN-1998
Preferences	Oracle Self-Service	Standard	01-JAN-1998

Users

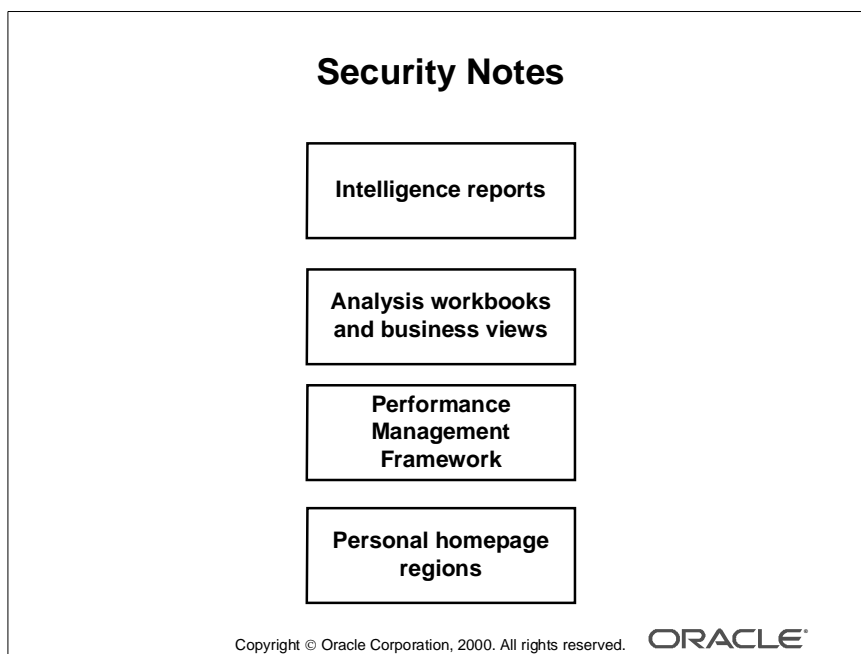
System Administrator Responsibility

(N) Security—>User—>Define

You define users in the Users window. In this window, you can also change a user's password and other information, such as the description and so on. You also use this window to assign the user various responsibilities.

Technical Note

The information that you enter in the Description field will be displayed in the banner on the PHP.



Describing Additional Security Requirements

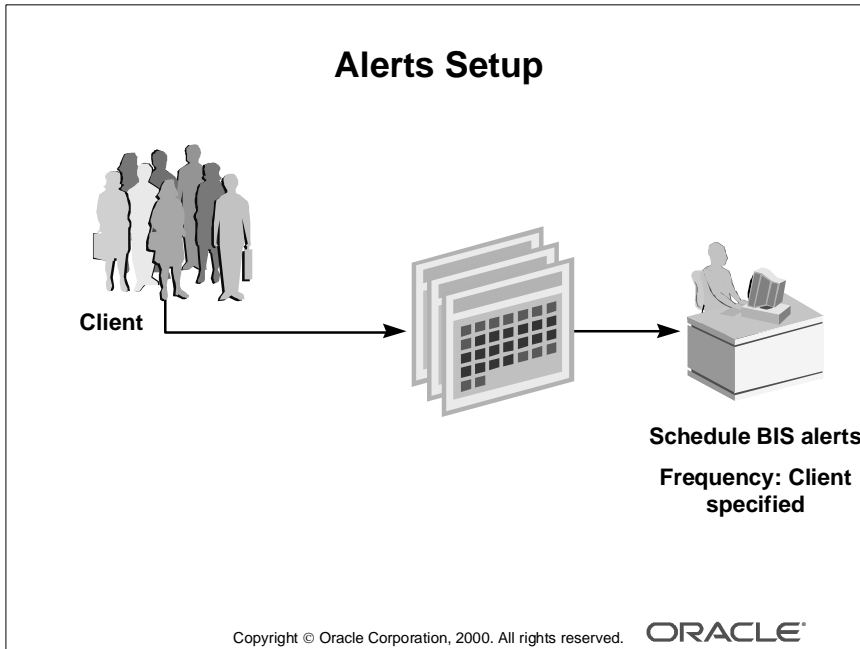
When setting up security, consider the following additional security information:

- For most intelligence reports, security is handled using the standard Oracle Applications security mode. This means that security is related to the applications responsibility that a user selects at log in time. Thus, a user can only view data and run the reports designated by the profile options, functions, menus (including reports, forms, and workbooks) assigned to that responsibility.
- Security for business views is based on a model similar to the Human Resources security model, which relies on the concept of security profiles linked to an organizational hierarchy.
- Responsibilities control target-level access. Only responsibilities that have been granted access to a target level can set targets for the performance measure, receive notifications, or monitor the target level on the PHP.
- Access to the following BIS PHP regions is restricted based on a user's responsibility:
 - Performance Measures region
 - Navigate region
 - Favorites region
 - Trends region

Note: Make sure that the user has access to the Preferences menu to add the aforementioned regions.

Note: For more information about BIS-related security, refer to the chapter titled “Security Overview” in *Implementing Oracle Business Intelligence System, Release 11i*.

Alert Postinstallation Tasks



Describing Alert Postinstallation Tasks

Oracle Alert is typically installed during the rapid installation process.

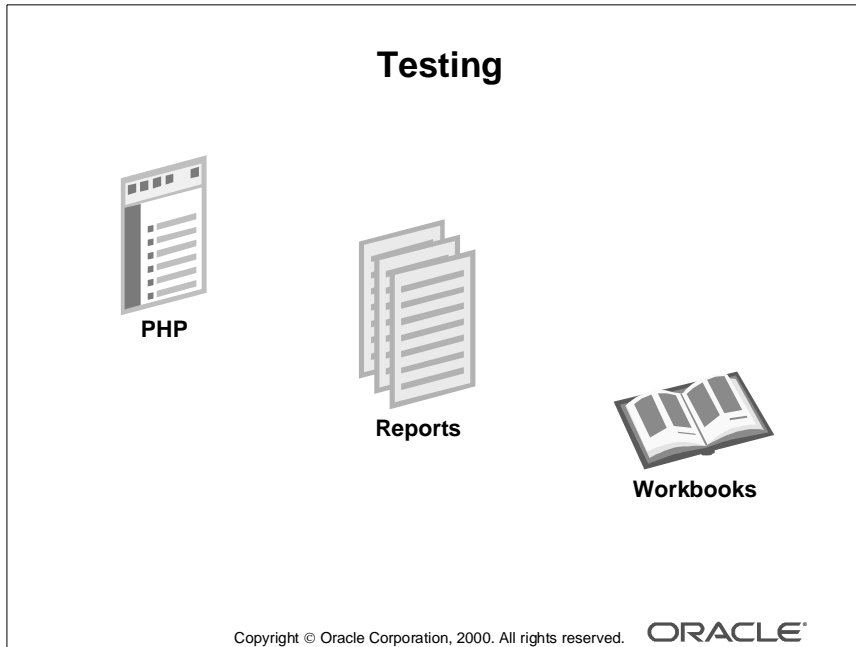
For detailed information about setting up Oracle Alert, consult the *Implementing Oracle Alert* guide.

In addition to setting up alerts, you must ensure that the appropriate BIS alerts have been enabled. You can check to see if a BIS alert is enabled by logging into Oracle Applications, using the Alert Manager responsibility, and then querying the Alert Definition window by entering one of the following search strings:

- In the Application field: Oracle Applications BIS
- In the Name field: BIS% or BI%

Scheduling Alerts After ensuring that BIS alerts are enabled, you must schedule them. To schedule BIS alerts, select the Alert Manager responsibility and change the alert's frequency from On Demand to a value specified by the client that corresponds to the client's environment.

Testing BIS Installations



Testing the System

After you finish performing all of the required postinstallation steps, you should test the system by doing the following:

- Verify that the PHP is operational.
 - Log into Self Service Web Applications.
 - Make sure that the homepage appears with all of the correct regions and tabs.
 - Click the Customize Page icon to make sure that you can access PHP customization features.
 - Verify that all of the appropriate regions and menus are available
- Verify that reports run by selecting a variety of reports from the intelligence area menus.
- Verify that WebDiscoverer workbooks are operational by selecting a variety of analysis workbooks from the intelligence area menus.
- Test the help icons for several reports, menus, and workbooks.
- Set up a few performance measures and make sure that they appear in the Performance Measures region of the PHP.
- Test Trend graphs.
- Test Ask Oracle.
- Test Business Views Catalog Search.
- Test Worklist.

Testing the System (continued)

Technical Note

Before you can successfully run reports and workbooks, you must ensure that the intelligence area for that particular report or workbook has been set up. The next lesson provides overviews of the setup requirements for each intelligence area.

Practice 20-1 Overview

Practice 20-1 Overview

This practice covers the following topics:

- Describing reports postinstallation
- Describing Discoverer postinstallation tasks
- Describing OSSWA postinstallation tasks
- Describing user access and alerts
- Describing concurrent programs and reports

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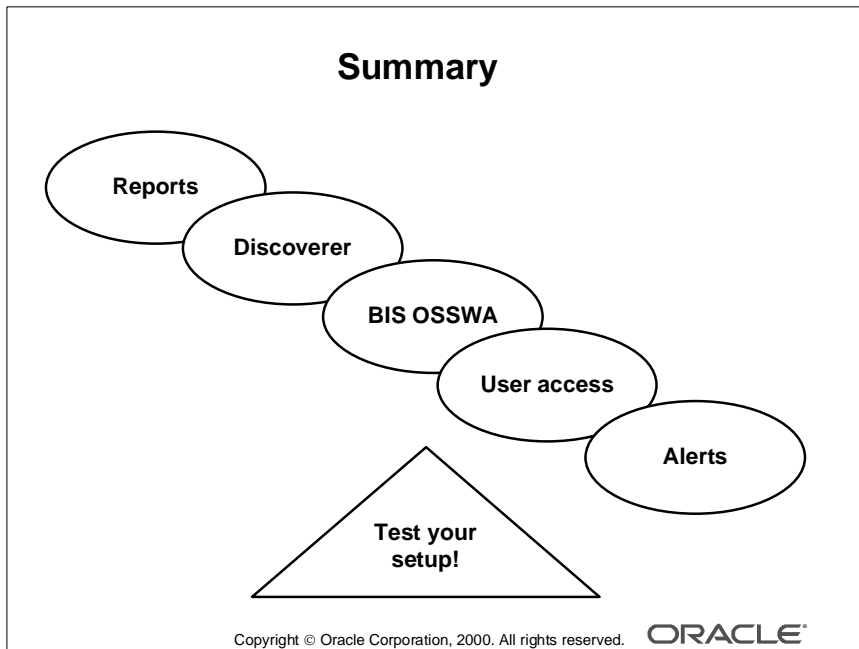
Overview

In this practice, you answer a series of questions that reinforce the concepts of BIS postinstallation tasks.

Performing This Practice

For detailed instructions on performing this practice, see Practice 20-1 in Appendix A, “Practices and Solutions.”

Summary



Summary

This lesson discussed the BIS postinstallation requirements, including the following topics:

- Reports postinstallation requirements, including setting up the appropriate report environment variables
- Discoverer postinstallation requirements, including granting users access to the business areas and workbooks
- Oracle Self Service Web Application postinstallation requirements, including setting up the appropriate system profile options
- Setting up user access to the BIS application
- Reviewing BIS alerts postinstallation tasks
- Testing your setup to ensure that you performed the postinstallation tasks correctly

Setting Up BIS

Objectives

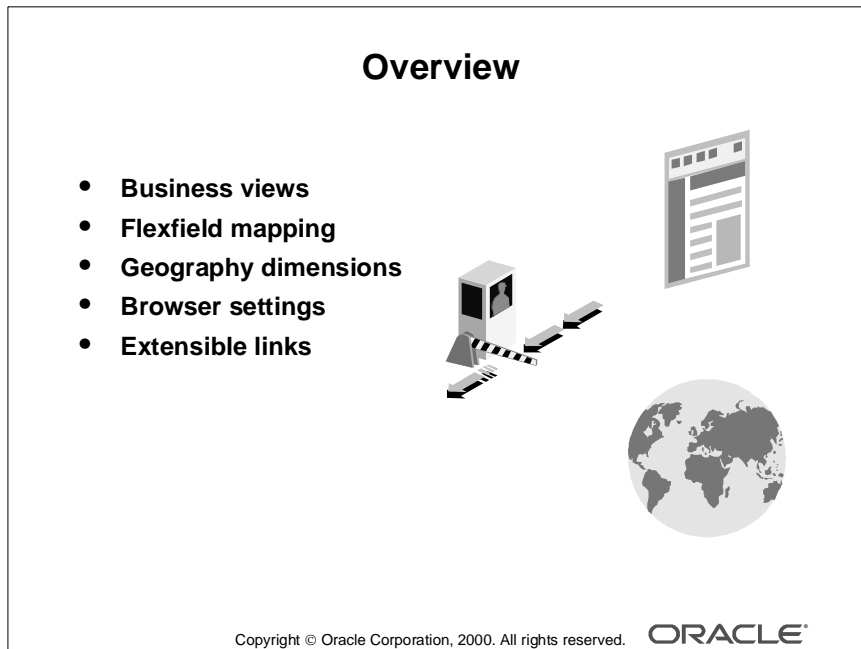
Objectives

After completing this lesson, you should be able to do the following:

- **Describe BIS setup requirements**
- **Explain business views setup**
- **Describe flexfield mapping and Geography dimensions setup**
- **Explain how to set up browser settings**
- **Explain how to set up extensible links**

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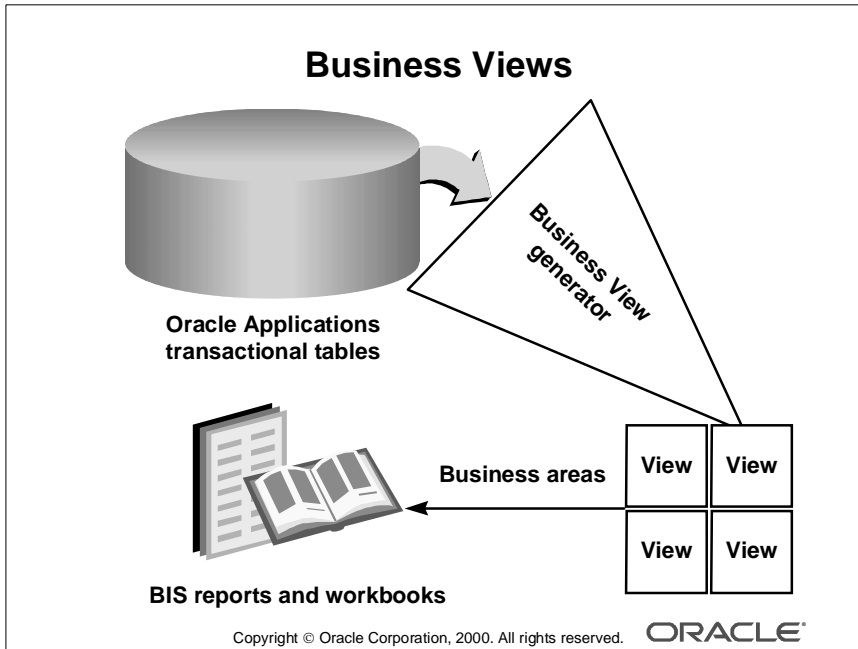
Overview



Importance of This Lesson

This lesson explains how to set up the underlying functionality of BIS, such as security and Geography dimensions.

Business Views Setup

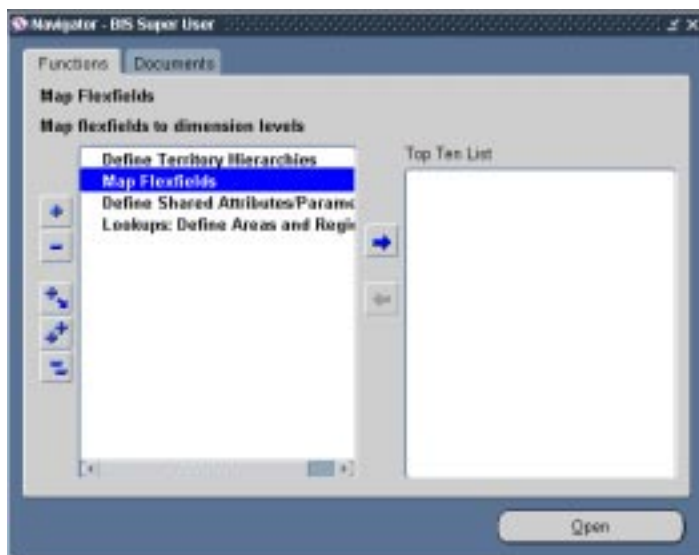


Describing Business Views Setup

As mentioned in the lesson titled “Using Business Views,” nearly all BIS transactions retrieve their data from application-owned business views. For each intelligence area, business views provide the source data for all of the analysis workbooks.

You must generate business views before data appears in analysis workbooks. To generate them, however, you must have access to the Business Views Setup responsibility.

BIS Super User Responsibility



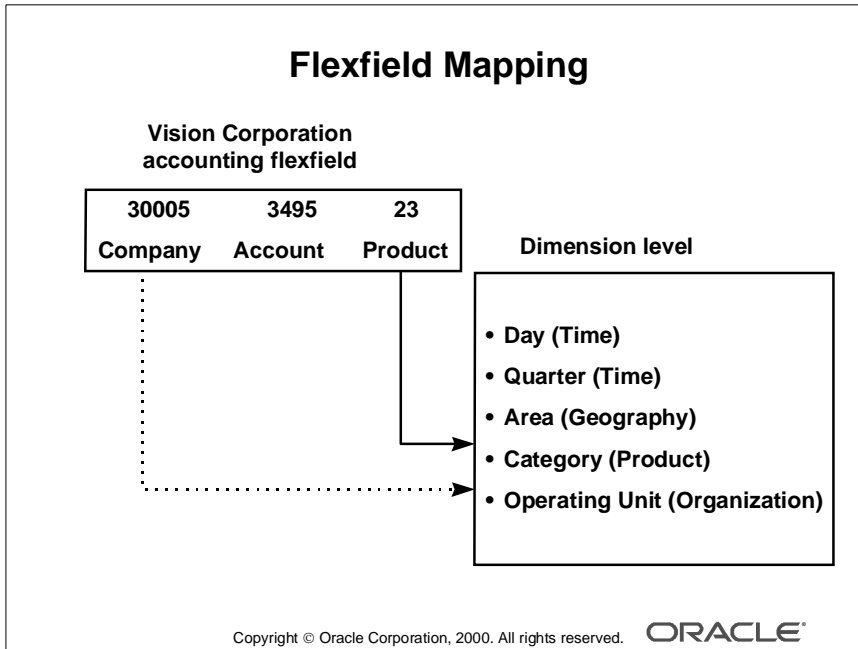
Describing the BIS Super User Responsibility

To access the BIS Super User responsibility, log into Oracle Applications and select the BIS Super User responsibility.

You use the BIS Super User responsibility to set up flexfield mapping, Geography dimensions, and territory hierarchies, all of which are explained on the following pages. This responsibility includes links to the following windows:

Menu Item	Description
Define Territory Hierarchies	Access this window to set up country and area hierarchies. You set these up after you set up lookup areas and regions
Map Flexfields	Access this window to map existing flexfields to dimension levels.
Define Shared Attributes/Parameters	Use this window to create custom fields and attributes from a predefined function. Note: This option is not covered in this course. For more information about this menu option, refer to the Oracle Applications online Help for this window.
Lookups: Define Areas and Regions	Use this window to define areas and regions. This definition must be set up before you define territory hierarchies.

Flexfield Mapping



Explaining Flexfield Mapping

Flexfield mapping enables you to use flexfield value sets to perform more meaningful analysis and to expand the amount of information that you can analyze. When you map flexfields, you relate attributes of descriptive flexfields or segments of key flexfields to dimension levels.

Assume that you have a key flexfield (accounting flexfield) with the following segments:

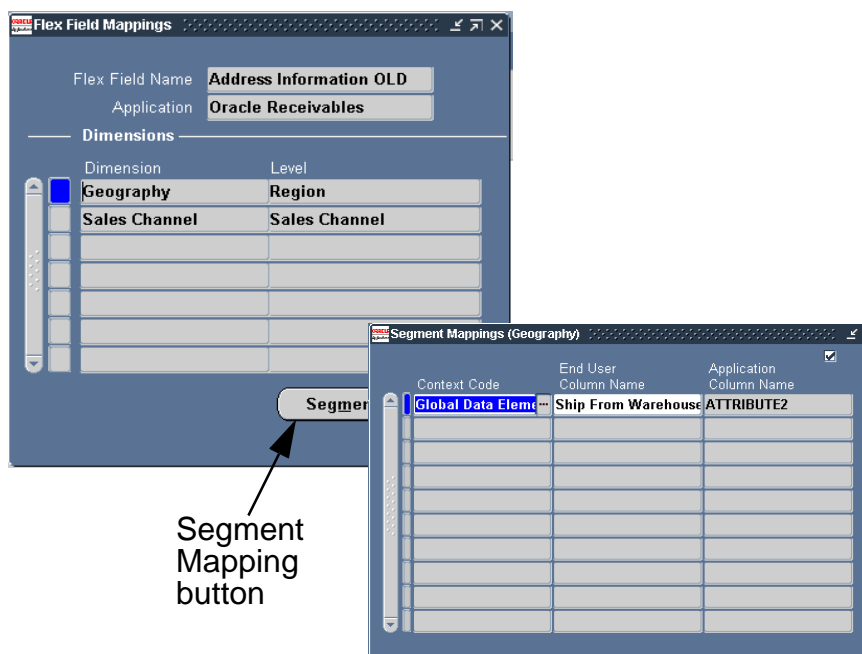
- Company
- Account
- Product

Using flexfield mapping, you might map the Company segment to the Operating Unit dimension level and you might map the Product segment to the Product dimension level. Then whenever you select a dimension level related to operating units or products, the flexfields that you mapped automatically appear in the list of values for the dimension.

You perform flexfield mapping in Oracle Applications, under the BIS Super User responsibility.

Technical Note

To implement flexfield mapping, you must have knowledge of the customer's flexfield structure and dimension hierarchy mapping.



Flexfield Mappings

(N) BIS Super User—>Map Flexfields

Explaining Flexfield Mapping (continued)

The example illustrates a flexfield map created for the flexfield Address Information. In this example, the flexfield is associated with the following dimensions and their related dimension levels:

- Dimension: Geography
Dimension level: Region
- Dimension: Sales Channel
Dimension level: Sales Channel

Explaining the Segment Mapping Process

After setting up the dimension and dimension levels to which you want to associate a flexfield, you must click the Segment Mapping button (partially shown in the example) to open the Segment Mappings window. In this window, you select the context code, which represents the dimension level that you selected for the segment. Next, you select the segment of the flexfield that you want to map. The applicable application column name automatically appears in the Application Column Name field. This completes the flexfield map for the Geography dimension.

Note: To set up flexfield maps for additional dimensions, you must select each dimension and repeat the segment mapping process.

Flexfield Mapping Summary

Map any flexfield segment to a dimension level

Example:

Flexfield: Accounts Information—>Dimension

Flexfield segment: Attribute2—>Dimension Level

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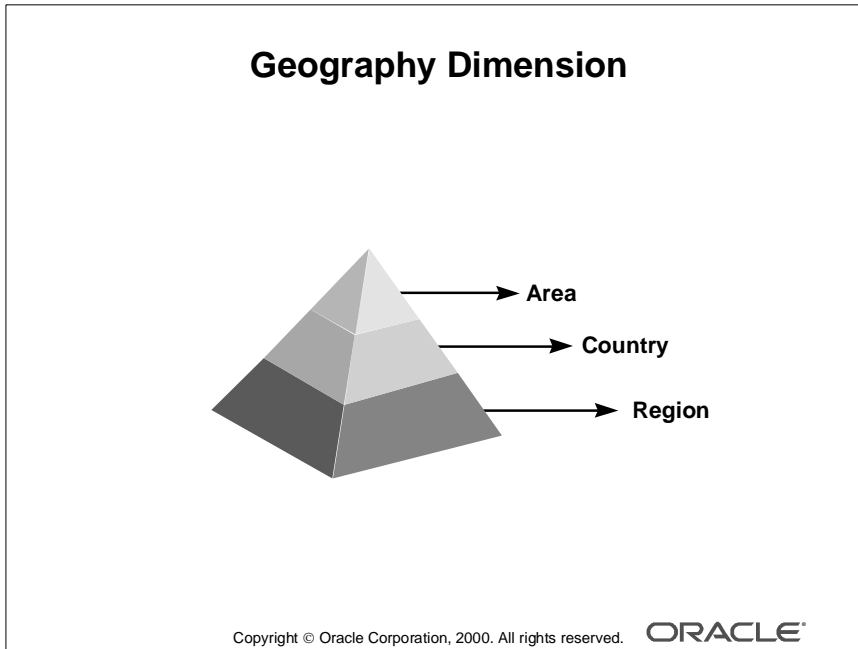
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Flexfield Mapping Summary

The following steps provide a summary of the flexfield mapping process:

- 1** Select the flexfield in the Flexfield Mappings window (example: GL Accounts).
- 2** Select the appropriate dimension to which you want to map the flexfield (example: Organization).
- 3** Select the appropriate dimension level that is associated with the dimension (example: Operating Unit).
- 4** Open the Segment Mappings window and select the flexfield segment (example: Attribute2).

Geography Dimension Setup



Describing Geography Dimensions

Geography dimensions enable you to categorize data by location. Geography dimensions are hierarchical in nature (that is one dimension level rolls up to the next level) and consist of the following levels:

- Area
- Country
- Region

The Area level rolls up to the country level, and the country level rolls up to the Region level. Thus, a region must exist before you set up an area or country, and a country must exist before you set up an area.

Note: For some installations, you might also see the Geography dimensions of Location and Total Geography.

Countries come preseeded with BIS, but users can enter their own areas and regions. After mapping these dimensions, you can view and use them when selecting reports and analysis workbooks from the personal homepage.

Describing the Geography Dimension Setup Process

Before setting up geographic dimensions, consider the following information:

- Region information must be captured in a descriptive flexfield segment
- Using online transaction processing (OLTP) forms, users can determine the address or location associated with a region.
- Customer, supplier, and organization locations include descriptive flexfields, which can be used to capture region information.
- After setting up the flexfields, use flexfield mapping to map the flexfield segment to the region level in the Geography dimension.

When you finish setting up Geography dimensions, reports that implement the Geography dimension will have drilldowns to the dimension levels that you specified when you set them up.

Technical Note

Additional dimensions come preseeded with BIS. Also, the various intelligence areas have dimensions and dimension levels specific to the area. For detailed information about BIS dimensions and dimension levels, refer to the *Oracle Business Intelligence System Implementation Guide, Release 11i*.

Application Object Library Lookups (Top Screenshot)

Type: AREA
 User Name: AREA
 Application: Oracle Applications BIS
 Description: BIS Geography Dimension Level

Access Level:
☐ User
☐ Extensible
☐ System

Effective Dates: From: 01-JAN-1999 To: [blank]

Enabled: ☒

Code	Meaning	Description	Tag	From	To	Enabled
310SYSTEST	310 Test Area 6			01-JAN-1999		<input checked="" type="checkbox"/>
AMERICAS	North					
AREA309A	Test a					
AREA309B	Test a					
AREA309C	Test a					
AREA309D	Test a					
AREA309E	Test a					
AREA309F	Test a					
AREA309G	Test a					
AREA309H	Test a					

Application Object Library Lookups (Bottom Screenshot)

Type: REGION
 User Name: REGION
 Application: Oracle Applications BIS
 Description: BIS Geography Dimension Level

Access Level:
☐ User
☐ Extensible
☐ System

Effective Dates: From: [blank] To: [blank]

Enabled: ☒

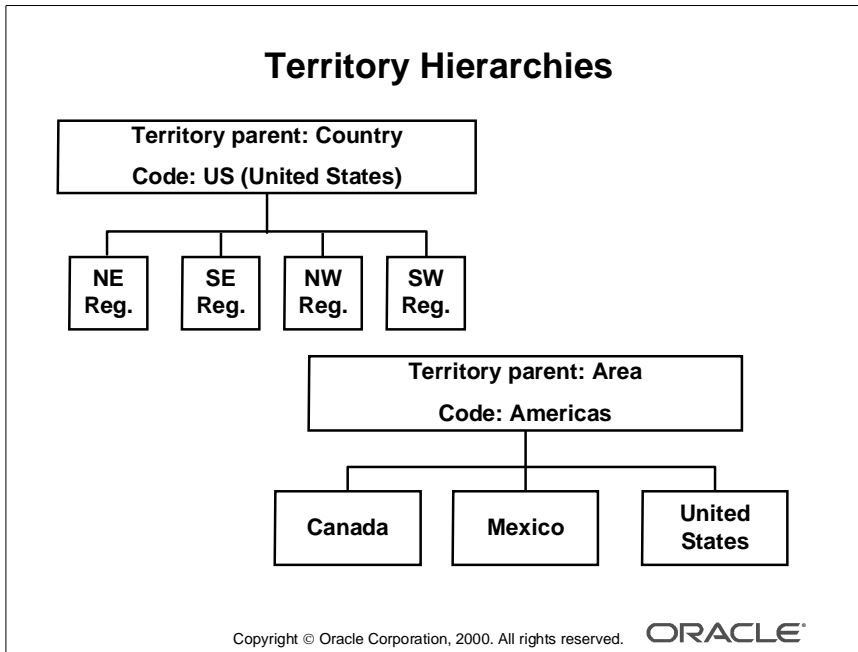
Code	Meaning	Description	Tag	From	To	Enabled
310SYSTEST	310 Test Region 1			01-SEP-1998		<input checked="" type="checkbox"/>
310SYSTEST	310 Test Region 2			01-SEP-1998		<input checked="" type="checkbox"/>
310SYSTEST	310 Test Region 3			01-JAN-1999		<input checked="" type="checkbox"/>
310SYSTEST	310 Test Region 4			01-JAN-1999		<input checked="" type="checkbox"/>
310SYSTEST	310 Test Region 5			01-JAN-1999		<input checked="" type="checkbox"/>
310SYSTEST	310 Test Region 6			01-JAN-1999		<input checked="" type="checkbox"/>
CAEAST	Canada Eastern Reg			27-SEP-1998		<input checked="" type="checkbox"/>
CAWEST	Canada Western Reg			01-JAN-1990		<input checked="" type="checkbox"/>
DPRUKSYSTI	DPRUK test region1			25-DEC-2000		<input checked="" type="checkbox"/>
DPRUKSYSTI	DPRUK test region2			25-DEC-2000		<input checked="" type="checkbox"/>

Application Object Library Lookups

(N) BIS Super User—>Lookups: Define Areas and Regions

Application Object Library Lookups (continued)

The examples illustrate lookup items for Area and Region Geography dimensions. After entering areas and regions and defining the appropriate territory hierarchies, users see the individual lookup items in drilldown selections in reports and workbooks. Thus, lookups appear as user-defined lists of values that can be selected as dimensions in a variety of reports and workbooks.



Explaining Territory Hierarchies

After you set up Geography dimensions, you use territory hierarchies to map regions to the Country territory and to map countries to the Area territory.

The first example shows four regions that have been mapped to the parent territory Country: US. Thus, if you drill down into a report dimension called Country, you see the four regions indicated on the slide.

The second example shows three countries that have been mapped to the parent territory Area. In this case, if you drill down into a report using a dimension called Area, you see Canada, Mexico, and the United States as your dimension-level choices.

Define Territory Hierarchies

Parent Territory Type: **Area**

Code: **AMERICAS** **North & South America**

Child Territory

Code	Name	Start Date	End Date
CA	Canada	27-SEP-2000	
MX	Mexico	27-SEP-2000	
US	United States	27-SEP-2000	

Define Territory Hierarchies

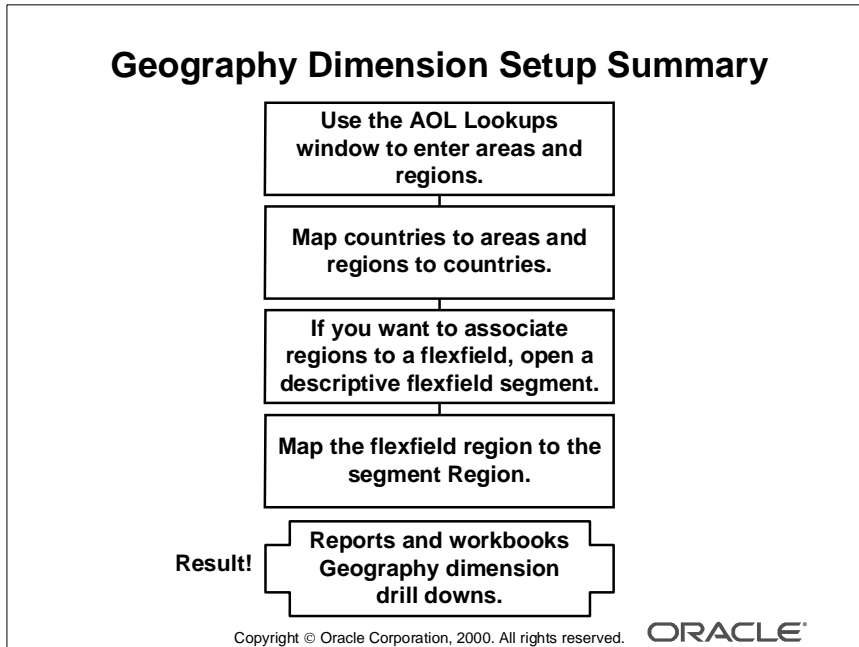
(N) BIS Super User—>Define Territory Hierarchies

Define Territory Hierarchies (continued)

This example illustrates an area territory hierarchy for the North and South America territory. In this case, the Area territory includes the following areas:

- Canada
- Mexico
- United States

Geography Dimension Setup Summary

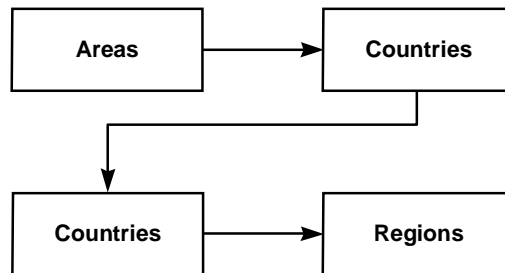


Geography Dimension Mapping Summary

The diagram on the slide describes how to map standard geographic dimensions, which you can perform separately from flexfield mapping.

Geography Dimension Maps

- Enter areas and regions using the Lookups: Define Areas and Regions window.
- Map areas to countries and countries to regions using the Define Territory Hierarchies window.



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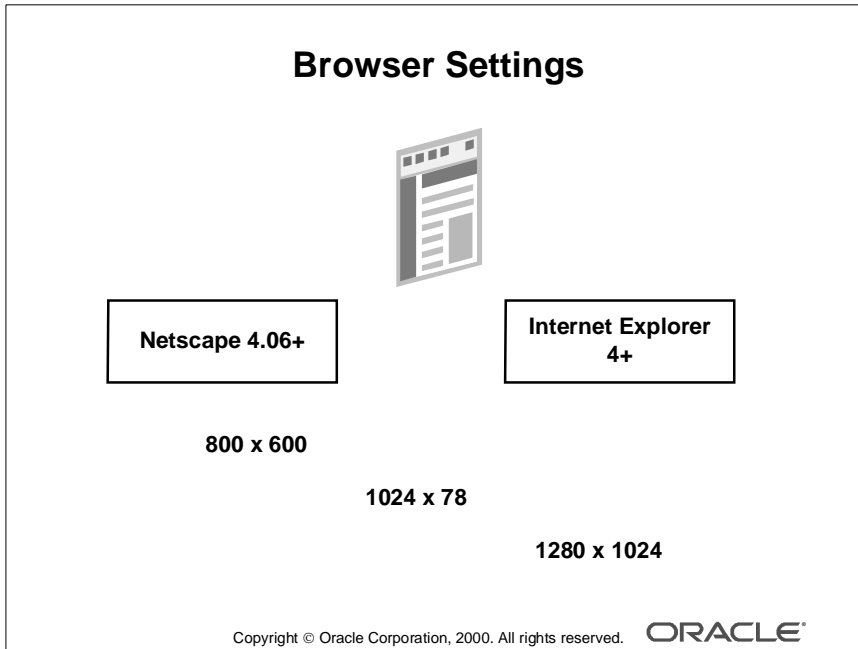
Describing the Geography Dimension Setup Process

Follow the steps provided to set up geography dimensions.

- 1 Using the BIS Super User responsibility, use the Application Object Library Lookups window to define areas and regions.
- 2 Map the countries to areas and the regions to countries in the Define Territory Hierarchies window.
- 3 Access the Flexfields Mapping window if you want to associate a flexfield with a dimension and a dimension level.

After performing these steps, you can view the results of this setup when you access reports and workbooks that use the dimensions that you set up.

BIS Browser Settings



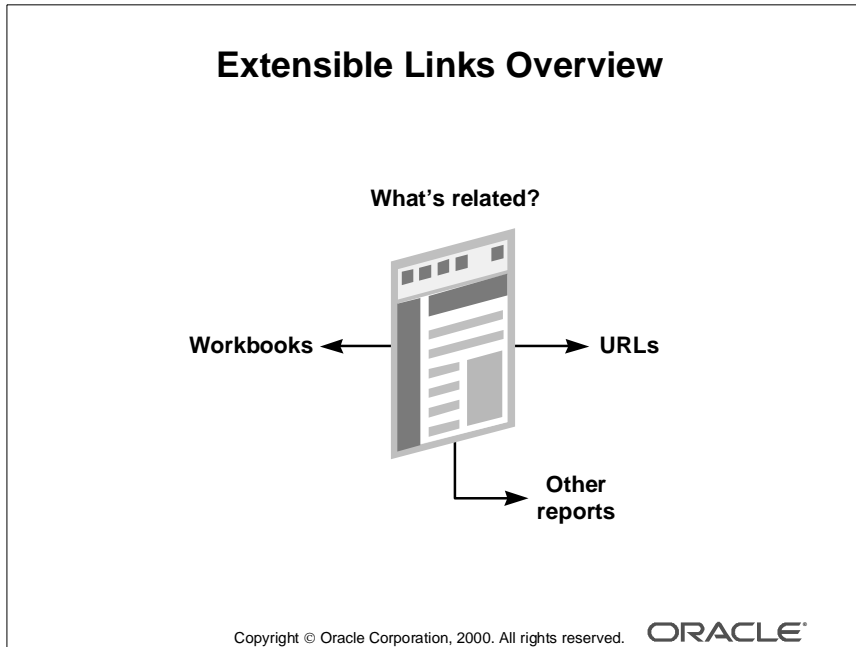
Reviewing BIS Browser Settings

BIS supports Netscape, version 4.0, and Internet Explorer, version 4.0 and later. When setting up browsers, consider the following information:

- Use Windows small font setting (resolution 800×600). Higher settings are preferable, such as 1024×768 or 1280×1024 . You can enter these settings in the Windows control panel by double-clicking the Display icon and then selecting the Settings tab.
- The size of the Windows desktop is not related to the Oracle Self Service Web Applications (OSSWA) window size. The OSSWA window size is set by the applications and typically is 800×600 .
- Setting the desktop area to 1024×768 or greater enables access to the desktop behind the OSSWA window.

For more information about browser settings, consult the *Oracle Self Service Web Applications Implementation Guide*.

Extensible Links Setup



Describing Extensible Links

You use extensible links to save a “Web of links” in a BIS report’s “Related Information” section.

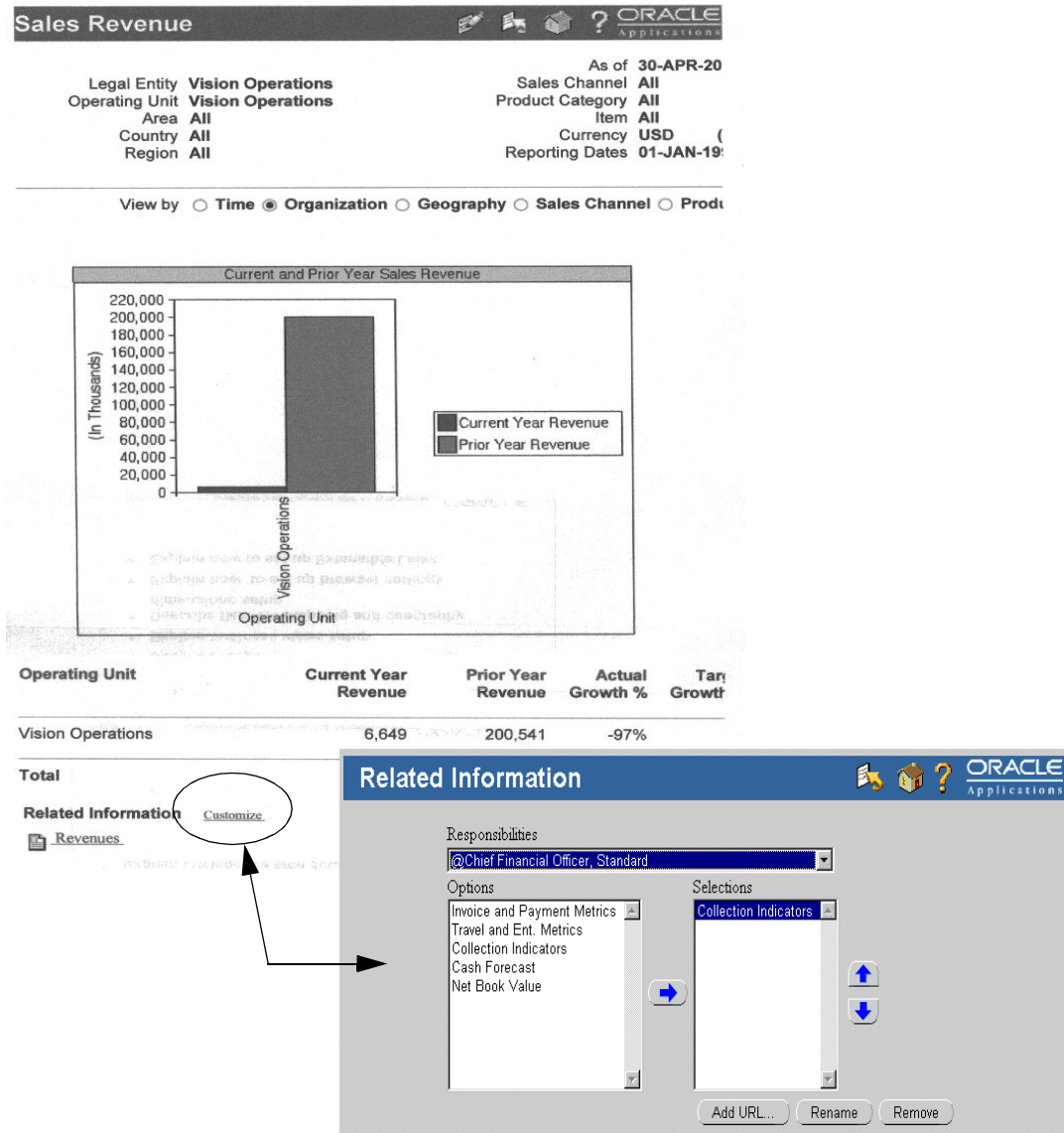
Extensible links include the following:

- Other reports
- Workbooks
- URLs

With report-related extensible links, common parameter values are passed from one report to the linked report, if applicable. If not, when you select a report-related link, a parameters window appears before you can view the report.

Note: Most BIS reports do not include extensible links.

Lesson 21: Setting Up BIS



Extensible Links Example

The example shows a report that includes an extensible links option. When you click the Customize link in the report, the Related Information window opens. In this window, you can select a related link from the Options list, or you can add a URL. After you add links and URLs, they appear in the "Related Information" section of the report.

Practice 21-1 Overview

Practice 21-1 Overview

This practice covers the following topics:

- Describing BIS setup requirements
- Describing BIS security
- Explaining business views

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Overview

In this practice, you answer a series of questions that reinforce the concepts of BIS setup.

Performing This Practice

For detailed instructions on performing this practice, see Practice 21-1 in Appendix A, “Practices and Solutions.”

Practice 21-2 Overview

Practice 21-2 Overview

This practice covers the following topics:

- Viewing BIS users and responsibilities
- Reviewing functions and menus
- Accessing the flexfield mapping and Geography dimensions

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Overview

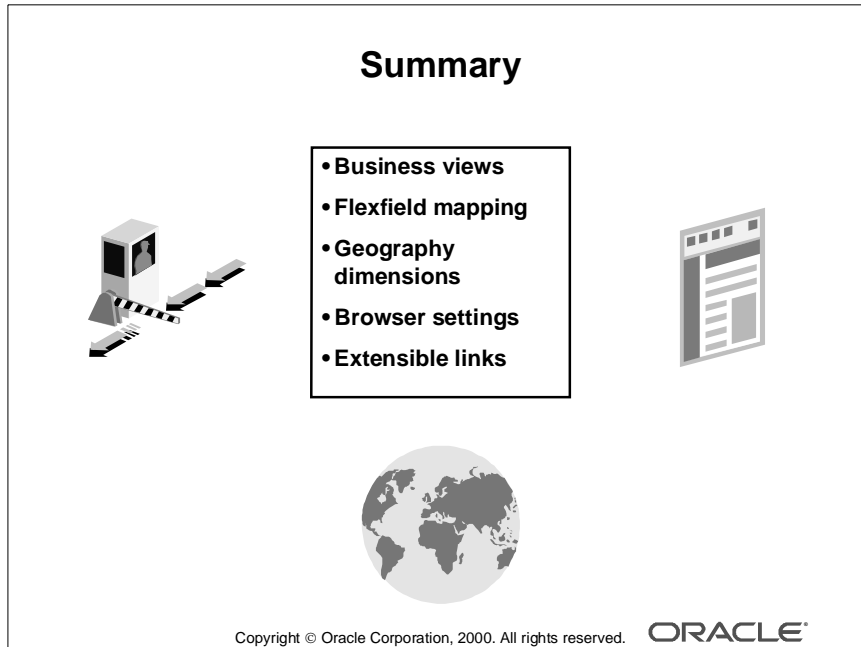
In this practice, you navigate and view the following BIS setup components:

- Flexfield mapping and Geography dimensions
- Browser settings
- Extensible links

Performing This Practice

For detailed instructions on performing this practice, see Practice 21-2 in Appendix A, “Practices and Solutions.”

Summary



Summary

This lesson explained the following BIS setup requirements:

- Business views
- Flexfield mapping
- Geography dimensions
- Browser settings
- Extensible links

Setting Up Intelligence Areas

Objectives

Objectives

After completing this lesson, you should be able to do the following:

- **Describe common setup requirements for intelligence areas**
- **Describe setup requirements for Financials intelligence**
- **Describe setup requirements for Human Resources intelligence**
- **Describe setup requirements for Operations intelligence**
- **Describe setup requirements for Process Manufacturing intelligence**

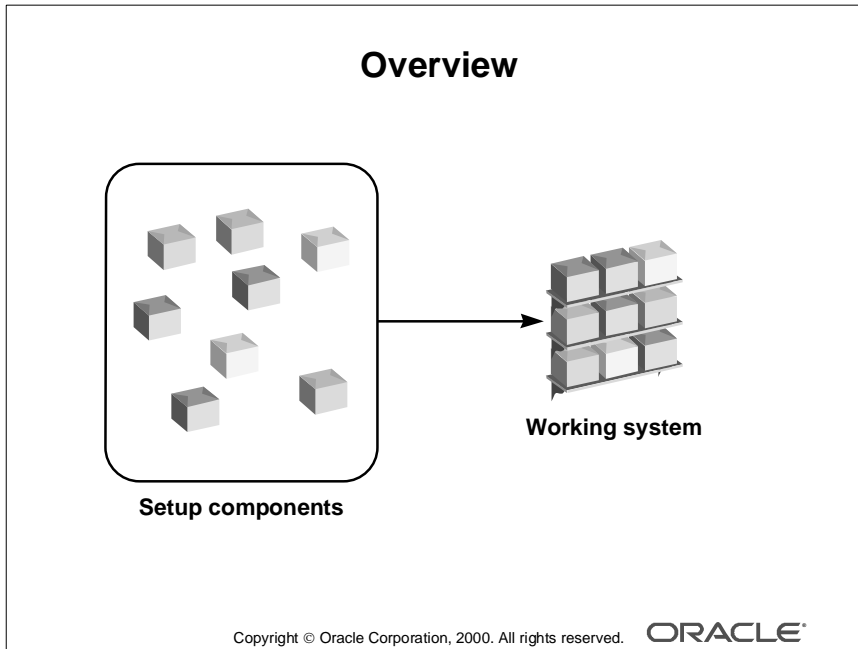
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Objectives

- Describe setup requirements for Marketing intelligence
- Describe setup requirements for Purchasing intelligence
- Describe setup requirements for Call Center and Customer intelligence
- Explain system test requirements after BIS setup

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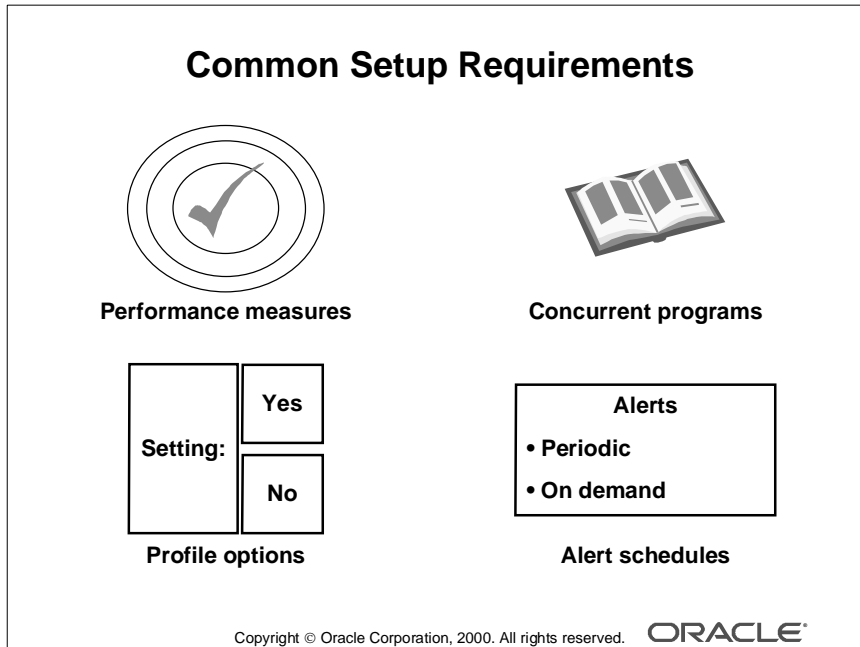
Overview



Importance of This Lesson

This lesson describes the setup requirements for each of the intelligence areas. Completing setup requirements for each intelligence area organizes and activates the intelligence area.

Common Setup Requirements for Intelligence Areas

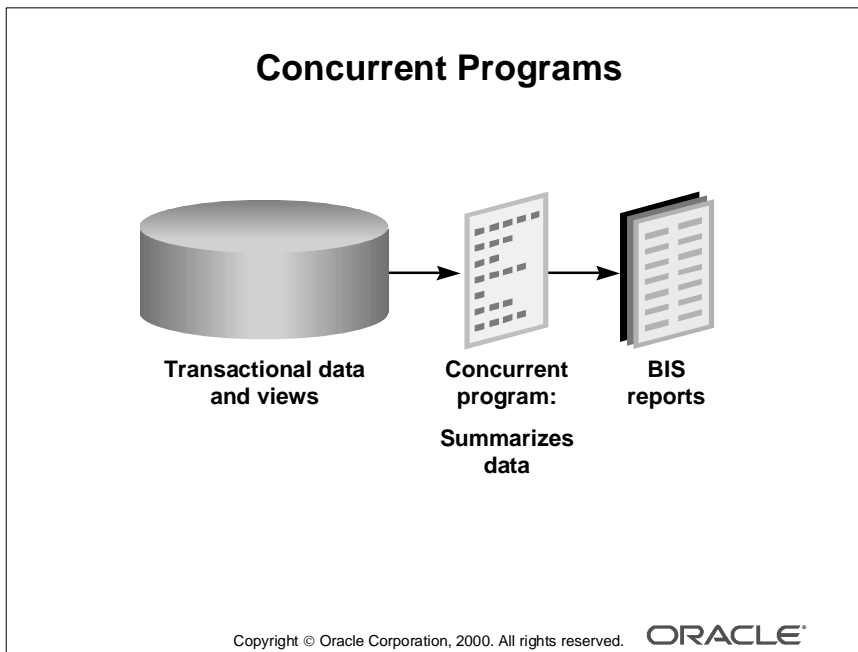


Describing Common Setup Requirements

Although some intelligence areas require unique setup, nearly all areas require that you perform one or more of the following activities:

- Set up performance measures for the area
- Set profile options specific to each area
- Schedule or run alerts
- Run concurrent programs related to reports

This lesson does not cover the specific performance measures and alerts related to each intelligence area. For more information about the performance measures and alerts for with each area, refer to Appendix B of this course.

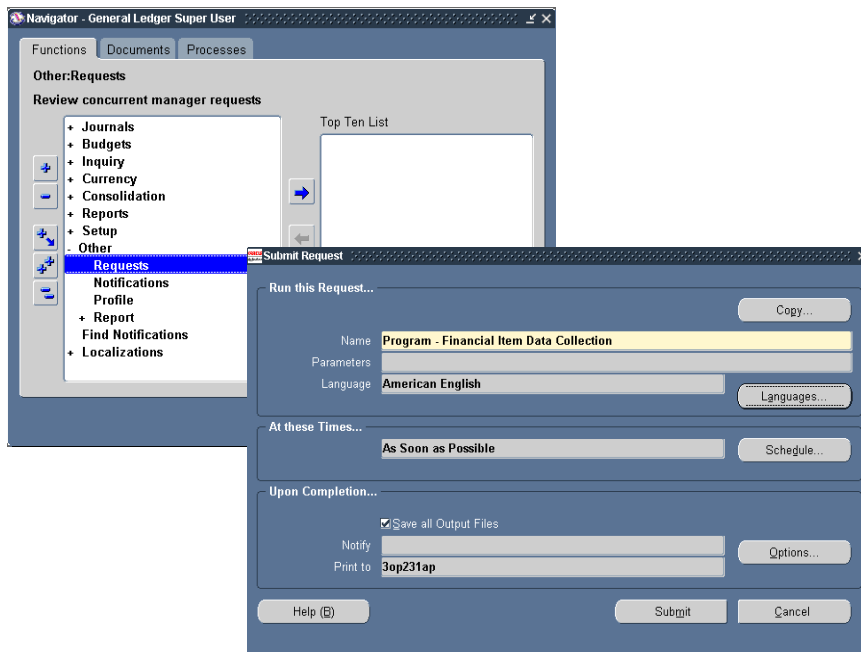


Describing Concurrent Program Functions

Most BIS reports display summarized business information. To view this summarized information, you must run one or more concurrent programs for each intelligence area. These programs perform the following functions:

- Extract transactional data from tables
- Summarize the extracted data
- Save the data in BIS tables

Note: Refer to the *Oracle Business Intelligence System Implementation Guide, Release 11i* for the most current information.



Navigator - <Application> Super User

(N) Other—>Requests

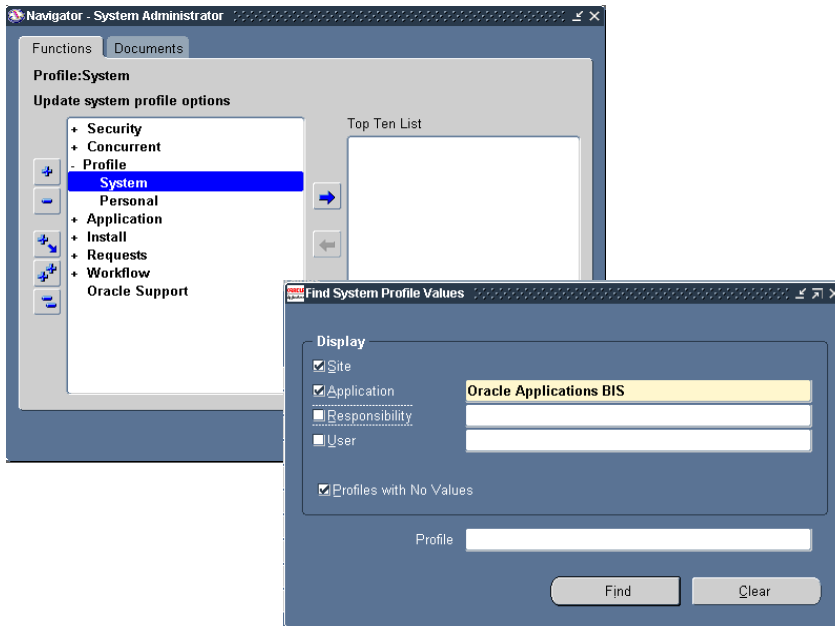
Navigator - <Application> Super User (continued)

To access and run the concurrent programs, you should be logged into the business area Super User responsibility. For example, to run the concurrent programs for financials-related reports, you must log into the GL Super User responsibility. After navigating to the Requests window, select the appropriate concurrent program from the list of values.

Technical Note

The navigation paths for submitting concurrent requests are not consistent between different applications and responsibilities. Check the applicable user's guide to determine the appropriate navigation paths for the application or responsibility in which you are working.

Note: The specific concurrent programs related to each intelligence area are discussed later in this lesson.



Find System Profile Values

(N) Profile—>System (from the System Administrator responsibility)

Describing BIS Profile Options

BIS profile options specify information, such as the location of reports files, the default number format, and other customized features related to an intelligence area. Most intelligence areas require that you set up profile options.

Using the system administration Profile Values window, you can verify and enter values for the profile options that define the locations and settings, such as the number format, associated with various BIS technology components. For most BIS installations, you need to set only site-level profile options.

Note: The discussions on individual intelligence areas include more information about profile options.

The image displays two screenshots of the 'System Profile Values' window, which is used for configuring site-level profile options for the BIS application.

Top Screenshot: This window shows the 'ICX: Oracle Payment Server UI' profile selected. The table below lists various profile options and their current values.

Profile	Site	Application	Responsibility	User
ICX: Oracle Payment Server UI	http://ap809sun.us.c	Oracle Application		
ICX: Override Location Flag	Yes			
ICX: Override Requestor	No			
ICX: Report Format	HTML			
ICX: Report Images	http://ap805sun.us.c			
ICX: Report Launcher	http://ap808sun.us.c			
ICX: Report Link	http://ap805sun.us.c			
ICX: Report Server	http://ap808repsevr			
ICX: Requisition Sever	http://ap800sun.us.c			
ICX: Territory				

Bottom Screenshot: This window shows the 'ICX: Days Needed By' profile selected. The table below lists various profile options and their current values.

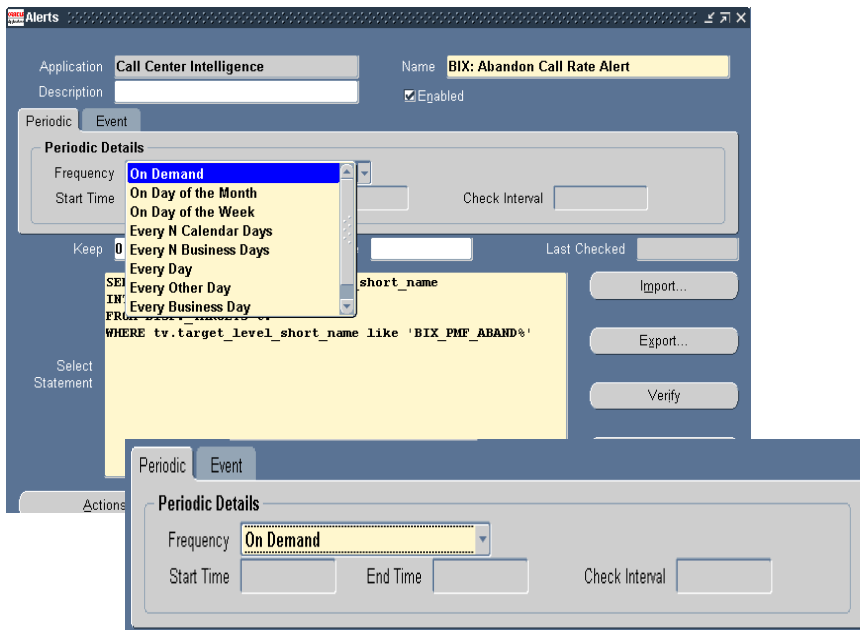
Profile	Site	Application	Responsibility	User
ICX: Days Needed By	2	Oracle Application		
ICX: Default Discoverer Workbo				
ICX: Default Employee				
ICX: Default Requisition Templ				
ICX: Discoverer End User Layer	EUL			
ICX: Discoverer Launcher	http://ap152wgs.us.c			
ICX: Forms Launcher	http://ap800sun.us.c			
ICX: Language	American English			
ICX: Limit connect	1000			
ICX: Limit time	4			

Describing BIS Profile Options (continued)

Profile Options Example After you enter the specific find criteria in the Find System Profile Values window, the System Profile Values window appears.

The examples show typical site-level profile options for the BIS application. In the first example, notice that a variety of options are set for report locations. The second example provides profile options for Discoverer.

If you experience problems with inappropriate links for reports and workbooks, make sure to double-check profile options for reports and workbooks.



Alerts

Alert Manager Responsibility

(N)Alert—>Define

Describing Alert Scheduling

To ensure that the most recent data is compared against current performance measures, many intelligence areas require that you schedule the appropriate alerts to be run on a regular basis. In this case, you need to set up BIS-related alerts to run on a periodic basis.

You can schedule alerts to run at almost any frequency and time desired. You can also run alerts on demand. When you run a BIS alert, the actual value is calculated, and the target value is compared to the actual value. If the alert detects a variance that exceeds the set range, it calls Oracle Workflow. Oracle Workflow routes notifications about the variance to the appropriate responsibilities that you identified when you set up the performance measures.

Note: To search for the alerts for a specific intelligence area, query the Alerts window Name field (not the Application field) using BIS%.

Intelligence Area Setup

Intelligence Areas

- Financials
- Human Resources
- Operations
- Process Manufacturing
- Marketing
- Purchasing
- Customer
- Call Center

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Describing Intelligence Area Setup

BIS also requires that you perform setup steps for the following intelligence areas:

- Financials
- Human Resources
- Operations
- Process Manufacturing
- Marketing
- Purchasing
- Customer
- Call Center

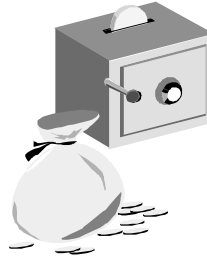
As previously discussed, you need to set up performance measures and profile options and run the appropriate concurrent programs. This section is an overview of the setup requirements for each of the intelligence areas.

For detailed steps on how to set up a specific intelligence area, refer to the *Oracle Business Intelligence System Implementation Guide, Release 11i*.

For more information about the reports, performance measures, and analysis workbooks for each area, refer to Appendix B of this course.

Financials Intelligence

- **GL company**
- **GL secondary measure**
- **Financials items**
- **Common stock and dividends**
- **Budget specification**
- **Performance measures, profile options, and concurrent programs**



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Describing Financials Intelligence Setup

In addition to setting up financials performance measures and scheduling or running financials alerts, you must also perform the following Financials intelligence setup tasks. You use the GL Super User responsibility to perform the financials setup.

GL company and GL secondary measure items represent the flexfield mapping that you need to perform for these two components.

The following items represent GL setup tasks:

- GL company
- GL secondary measure
- Financials items
- Commons stock and dividends
- Budget specification
- Performance measures, profile options, and concurrent programs

General Financials Setup Tasks

- Set up GL company and secondary measure. These indicate the organization by which you want to report revenues and other financial information, such as department and cost center. Map appropriate flexfields to dimensions
- Define financials items. Financials items determine how your actual and budget account balances are summarized. BIS uses financials items to calculate business indicators, such as the current ratio.
- Enter common stock and dividends. BIS uses this information to calculate financial measures, such as earnings per share.

Describing Financials Intelligence Setup (continued)

General Financials Setup Tasks (continued)

- Specify one of the GL budgets as the current budget. BIS compares actual values
- Specify the project identifier. The project identifier displays a project's number and name in project-related reports.

Financials Concurrent Report Programs

- Run the following concurrent programs to set up Financials intelligence reports:
 - GLOSUM-Financial Item Data Collection: Generates most of the major financials reports
 - PAXACMPT-PRC: Update Project Summary Amounts: Generates project analysis report
 - PABISUMS-PRC Refresh OBIS Summary Amounts: Generates project analysis report
- Set up multiple Financials intelligence profile options. Financials intelligence profile options are prefixed by PA.

Summary of Financials Intelligence Performance Measures

- Revenue
- AR Turnover
- Days Sales Outstanding
- Weighted Average Balance
- Weighted Average Days Late

Describing Financials Intelligence Setup (continued)

Summary of Profile Options for Financials Intelligence

Profile Option Name	Description
PA: Reporting Class Category 1	Maps class categories to projects
PA: Reporting Class Category 2	Maps class categories to projects
PA: Reporting Class Category 3	Maps class categories to projects
PA: Reporting Role Type 1 (System Default: Project Manager)	Maps role types to projects
PA: Reporting Role Type 1	Maps role types to projects
PA: Reporting Role Type 2	Maps role types to projects
PA: Reporting Role Type 3	Maps role types to projects
PA: Reporting Budget Type 1 (Cost) (System Default: Approved Cost Budget)	Maps budget types to budget amounts
PA: Reporting Budget Type 2 (Cost) (System Default: Forecasted Cost Budget)	Maps budget types to budget amounts
PA: Reporting Budget Type 3 (Revenue) (System Default: Approved Revenue Budget)	Maps budget types to budget amounts
PA: Reporting Budget Type 4 (Revenue) (System Default: Forecasted Revenue Budget)	Maps budget types to budget amounts

Note: See Appendix C for a summarized list of financials concurrent programs, their related reports, profile options, and performance measures.

HR Intelligence

- Organization hierarchy tables
- Currency conversion rate type
- Training hours
- Manpower
- Revenue growth and manpower
- Hours worked
- Absence hours
- Concurrent programs



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Describing Human Resources Intelligence Setup

In addition to setting up human resources (HR) performance measures and scheduling or running HR alerts, you must perform the following HR intelligence setup tasks.

General HR Setup Tasks

- Populate the appropriate summary tables, which are populated by a concurrent program: BIS Load Organization Hierarchy Summary Table.
- Set up a currency conversion rate type. HR Intelligence uses the conversion rates set up in the GL Daily Rate form.
- Set up the duration of training events in Oracle Training Administration (OTA).
- For custom time periods, you must copy and edit the template formula: `TEMPLATE_BIS_TRAINING_CONVERT_DURATION`. OTA comes installed with the following predefined time periods:
 - D (Day) = 8 hours
 - W (Week) = 40 hours
 - M (Month) = 169 hours
 - Y (Year) = 2028 hours

Describing Human Resources Intelligence Setup (continued)

General HR Setup Tasks (continued)

Note: You can also add additional time periods, but you must copy the `TEMPLATE_BIS_TRAINING_CONVERT_DURATION` formula and then rename it `TEMPLATE_BIS_TRAINING_CONVERT_DURATION`. Refer to Chapter 3, “Setup for Intelligence Areas,” in *Oracle Business Intelligence System Implementation Guide, Release 11i*.

- The number of training hours for employees is displayed in the Training Success report the following HR analysis workbooks:
 - Training Success Rate
 - Internal Student Success Rate
 - External Student Success Rate
 - Training Cost and Revenue
- Set up and customize manpower. Manpower represents the count of employee assignments and budget measurement types. Manpower is calculated by either one of the following:
 - Oracle FastFormula: Budget measurement type and budget value
 - User-defined formula using the templates `TEMPLATE_HEAD` and `TEMPLATE_FTE`.
- Set up revenue growth and manpower. Manpower analysis reports use revenue model dimensions, such as Time, Geography, and Product. There are two types of manpower calculations: HEAD (head count) and FTE (full-time equivalent). The two predefined formulas for manpower are `TEMPLATE_HEAD` and `TEMPLATE_FTE`.
- Set up and customize hours worked. Hours worked enables you to do following:
 - Investigate the number of regular hours worked
 - Set up information about how you record regular and overtime hours
 - Use Oracle FastFormula
 - Set up regular hours and overtime band formulas before you run the hours worked report

To set up hours worked, you first need information about how your organization records regular and overtime hours. To do this, you use Oracle FastFormula. First, you set up the formula that calculates regular hours recorded. The regular hour formula must be named `BIS_REG_HOURS`.

Describing Human Resources Intelligence Setup (continued)

General HR Setup Tasks (continued)

Next, you set up overtime formulas, which are indicated by bands. Overtime formulas must be named BIS_OT_BAND1, BIS_OT_BAND2, and so on. You can write up to 10 overtime bands.

- Set up and customize absence hours
 - Retrieve a record of the number of absence hours for each employee
 - Set up a redefined formula: TEMPLATE_DAYS_TO_HOURS

Note: 8 hours a day, 5 days a week, and 21 days per work month

Summary of Human Resources Intelligence Performance Measures

- Manpower Variance
- Manpower Separation
- Recruitment Success
- Training Success

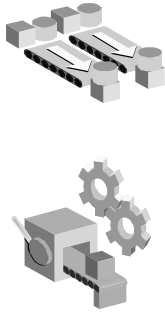
Summary of Profile Options for Human Resources Intelligence

Profile Option Name	Description
None	N/A

Note: See Appendix C for a summarized list of human resources concurrent programs, their related reports, and performance measures.

Operations Intelligence

- **Summary table builder**
- **Nonconformance load program**
- **Planning program**
- **Performance measures, concurrent programs**



The illustration shows two 3D block-based structures. The top structure represents a summary table builder, consisting of several rectangular blocks arranged in a grid-like pattern. The bottom structure represents performance measures and concurrent programs, featuring a cube with a circular dial and two interlocking gears.

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Describing Operations Intelligence Setup

In addition to setting up operations performance measures and scheduling or running operations alerts, you must perform the following Operations intelligence setup tasks.

General Operations Setup Tasks

- Set up the following profile options:
 - MRP: Plan Revenue Discount Percent. Enter the price average discount to be applied when calculating revenue of a plan or forecast as part of plan performance indicators.
 - MRP: Plan Revenue Price List. Enter the price list used to calculate revenue of a plan or forecast as part of plan performance indicators.
- You must set these two profile options before running Work in Process Production Per Employee (WIPBIPAE.rdf) and Production Per Employee by Period (WIPBIPAO.rdf).
- After installing BIS, run the planning program again to populate the summary tables
 - Refresh the business area of the Global Quality Results workbook. This workbook must be refreshed whenever either of the following events occurs:
 - You create a new collection plan
 - You add a new collection element to an existing plan

Describing Operations Intelligence Setup (continued)

Operations Concurrent Reports Programs

- CSTBISLD-OBIS Margin Analysis Load Run: Generates the data for margin analysis reports
- WIPBIND-Capture Production Indicators: Generates the data for production efficiency reports
- WIPBPTP-Capture Production Performance: Generates the data for work-in-process reports
- INVTURNITMS-Summarize Balances: Generates the data for the Period Inventory Turns report
- MRPPBIS-Populate Forecast Analysis: Generates the data for the forecast
- QLTBISB-BIS Summary Table Builder: Generates the data for the Nonconformance report

Notes about the QLTBISB Program:

- The nonconformance load program is used to transfer results from the QA_RESULTS table to the QA_BIS_RESULTS table. This summary table is then used to generate the nonconformance reports. The load program is accessed from the Oracle application: Oracle Quality.
- You should schedule the QLTBISB concurrent program using the incremental rebuild method. It is most efficient to run this program on a daily basis. Selecting the Complete Rebuild option, although less efficient, is recommended if Quality results are deleted from the QA_RESULTS table. This ensures that only actual results are used to generate the report.
- In the Quality Application navigator, select Quality—>Other—>BIS Nonconformance Loader to periodically run the nonconformance loader. This concurrent program can also be run by BIS end users. They can select the rebuild method to be used by the program. Using the Incremental Rebuild option is the most efficient method of populating the summary table. If any Quality results are removed from the table, they must run the load program using the Complete Rebuild option to ensure that only actual results are used to generate the Nonconformance report.

Summary of Operations Intelligence Performance Measures

- Sales Revenue Growth %
- Return by Value (called Return Percentage in BIS 1.2)
- On-Time Shipment by Value (called On-Time Shipment % in BIS 1.2)

Summary of Operations Intelligence Performance Measures (continued)

- Actual to Schedule (called On-Time Shipment in BIS 1.2)
- Scrap %
- Production Yield %
- Resources Utilization
- Gross margin % (represents the BIS 1.2 merged performance measure of >Gross Margin by Year, >Gross Margin by Product, >Gross Margin by Channel)
- MRP Forecast Error %
- MRP Forecast Error % by Demand Class
- MRP Inventory Turns
- MRP Gross Margin %
- MRP Ontime Delivery
- MRP Planned Utilization %
- Production Efficiency
- Inventory Turns
- WIP Inventory Trend
- Production per Employee
- Inventory Accuracy
- Backorders by Line (called Backorders in BIS 1.2)
- Backorders
- Returns by Line (called Return Percentage in BIS 1.2)
- Schedule-to-Request (Called Fill Rate in BIS 1.2)

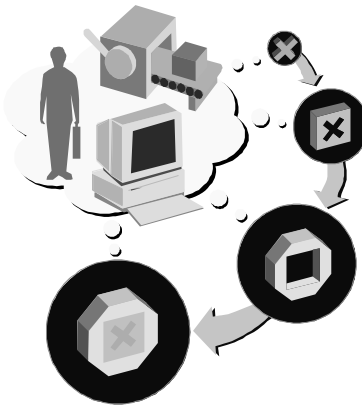
Summary of Profile Options for Operations Intelligence

Profile Option Name	Description
MRP: Plan Revenue Price List	Used to calculate the revenue of a plan or forecast
MRP: Plan Revenue Discount Percent	The average discount to be applied when calculating revenue of a plan or forecast

Note: See Appendix C for a summarized list of operations concurrent programs, their related reports, profile options, and performance measures.

Process Manufacturing Intelligence

- Organization hierarchies for Oracle Process Manufacturing
- Profile options
- Inventory cost and GL calendars
- Item cost
- Unit of measure conversion factor
- Performance measures, profile options, concurrent programs



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Describing Process Manufacturing Intelligence Setup

In addition to setting up Oracle Process Manufacturing (OPM) performance measures and scheduling or running OPM alerts, you must perform the following OPM intelligence setup tasks. For Inventory, Cost, and GL calendar setup, log into Oracle Applications with the GL Super User responsibility.

General OPM Setup Tasks

- Set up and customize organization hierarchies for OPM.
- Enter unit of measure (UOM) profile options. UOM profile options include the following:
 - PMI: Default UOM Conversion: Used to set up the global UOM conversion values across the OPM product
 - PMI: Default Company: Used by Process Manufacturing Intelligence (PMI) security to select a particular company
 - PMI: Default Company All: Used by PMI security to select all companies if the value is set to all

Note: The profile option PMI: Default Company takes precedence over PMI: Default Company All.

- Verify that inventory, cost, and GL calendars are set up. The Inventory calendar is used to control inventory transactions posting. The Cost calendar is used for cost posting. This calendar must be set for all companies for the fiscal year.
- Verify that item cost is set up. Run cost rollup and cost update concurrent programs to update the cost of individual items.

Note: You can also set item cost directly by using the Cost Detail form.

Describing Process Manufacturing Intelligence Setup (continued)

General OPM Setup Tasks (continued)

- Set up UOM conversion factor. Set the conversion factor for each individual item for the UOM set in the PMI: Default UOM Conversion profile option
- Schedule performance management framework alerts. Schedule the BIS: OPM Inventory Turns alert.

OPM Concurrent Reports Programs

- Cost rollup concurrent program: PMI Onhand Sales Summary
- Cost update concurrent program: PMI: Production Summary

Summary of Process Manufacturing Intelligence Performance Measures

- % OPM Batches Completed Late
- OPM Production Yield
- OPM Production Usage
- OPM ProductionYield vs. Usage Ratio
- OPM ProductionYield Variance
- OPM Production Usage Variance
- OPM Inventory Turns Measure
- OPM Onhand Inventory

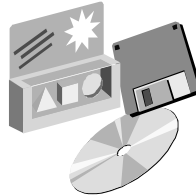
Summary of Profile Options for Process Manufacturing Intelligence

Profile Option Name	Description
PMI: Default UOM Conversion	Sets up the global unit of measure conversion value for all of Oracle Process Manufacturing (OPM)
PMI: Default Company All	Selects OPM related companies based on the value provided
PMI: Default Company	Used by PMI Security to select a particular company to be used as the default OPM-related company

Note: See Appendix C for a list of process manufacturing concurrent programs, their related reports, profile options, and performance measures.

Marketing Intelligence

- Inventory items assigned to sales categories
- Interaction outcomes and results
- Performance measures, profile options and concurrent programs



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Describing Marketing Intelligence Setup

In addition to setting up marketing performance measures and scheduling or running marketing alerts, you must perform the following Marketing intelligence setup tasks.

General Marketing Setup Tasks

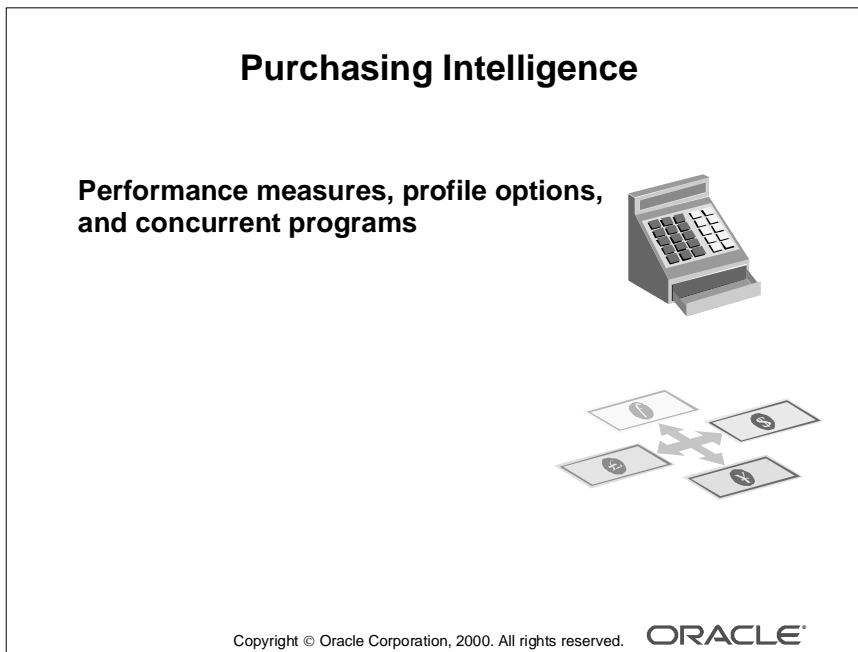
- Set up the following profile options:
 - CRM BIS: Period Set Name. Sets up the reporting calendar
 - CRM BIS: Period Type. Specifies the period level at which you want to store your data

Note: You must first define period types and calendars in Oracle General Ledger (using the GL Super User responsibility) before you can refer to them in the CRM BIS profile options mentioned above.

- Assign inventory items to the sales categories within the sales category set.

Note: See the *Oracle Inventory User's Guide, Release 11i* for more information about assigning inventory items to sales categories.
- For reports on response rates, you must verify that interaction outcome and results have already been defined. If not, define interaction outcomes and results, or set positive outcome and positive response flags in the Interaction History Administration form.
- Run concurrent programs to create summarized report data.

Note: See Appendix C for a list of marketing concurrent programs, their related reports, profile options, and performance measures.



Describing Purchasing Intelligence Setup

In addition to setting up purchasing performance measures and scheduling or running purchasing alerts, you must run the following Purchasing reports concurrent program: POAFTXPO-Populate Procurement Fact Tables.

Purchasing Intelligence Profile Options With Purchasing intelligence, you need to set the POA Global Security profile option. Setting this profile option enables the system to determine the appropriate security access for purchasing reports.

The system first checks the lowest-level option (User option). If the system does not find a value, it continues to check each higher level, such as responsibility, application, and so on. If the system does not find any values, it sets reports access to No, meaning no users have global access to reports.

Even with global access to set to No, users still have access to at least one operating unit's reports (the one to which they have access). When the POA Global Security profile option is set to Yes, users have access to all operating unit intelligence reports.

Summary of Purchasing Intelligence Performance Measures

- Purchase Sales Ratio
- Contract Leakage %
- Suppliers Performance
- Contract Savings
- Purchases
- Suppliers and Customers

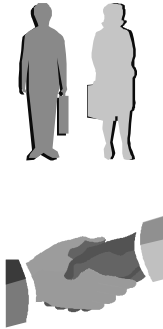
Describing Purchasing Intelligence Setup (continued)**Summary of Profile Options for Purchasing Intelligence**

Profile Option Name	Description
POA: Global Security	Determines access levels to operating units

Note: See Appendix C for a list of purchasing concurrent programs, their related reports, profile options, and performance measures.

Customer Intelligence

- Data setup forms
- Users
- Performance measures, profile options and concurrent programs



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Describing Customer Intelligence Setup

In addition to setting up Customer intelligence performance measures and scheduling or running Customer intelligence alerts, you must perform the following Customer intelligence setup tasks.

General Customer Intelligence Setup Tasks

- Set up the following profile options
 - BIC_SMRY_EXTRACTION_DATE. Indicates the last date when the extraction program was run
 - BIC_CUSTREP_NUM. Indicates the number of records shown in the customer transaction summary reports
 - BIC_DEBUG. Logs debug messages in the BIC_DEBUG table
 - CRMBIS: Currency Code. Used to set up the currency displayed in all revenue and cost information reports
 - CRMBIS: GL Conversion Type. Designates the conversion type used while converting to the currency specified in the CRMBIS: Currency Code profile option
 - CRMBIS: Period Set Name. Designates which accounting calendar is used in concurrent programs to populate summary tables in the time dimension of reports
 - CRMBIS: Period Type. Defines the lowest granularity of time at which you can collect and view data; refers to the Period Types set up in the Accounting Calendar

Describing Customer Intelligence Setup (continued)

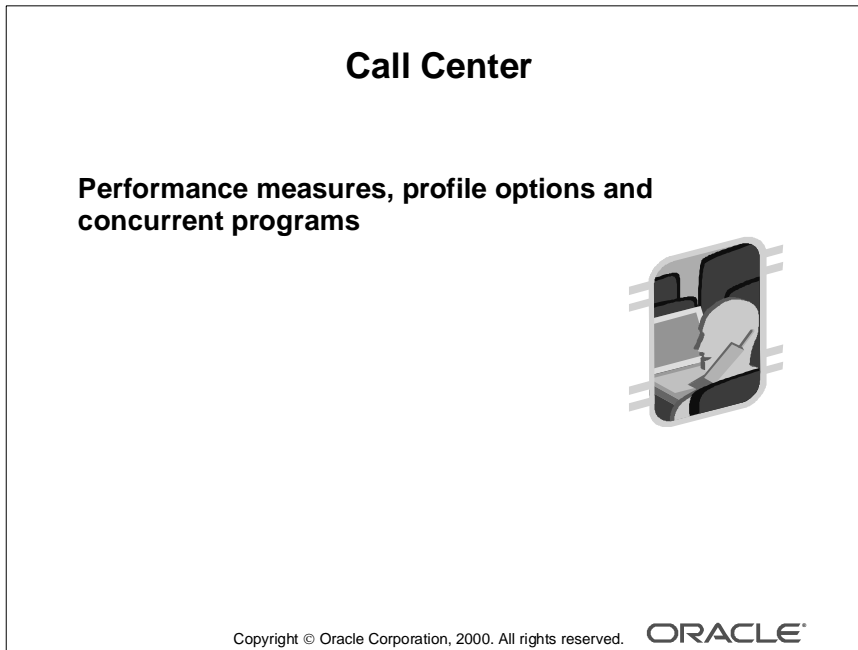
General Customer Intelligence Setup Tasks (continued)

- Define setup data using setup forms. This includes setting up the following Customer Intelligence Setup forms:
 - Acquisition and Retention. Enables system administrators to specify the values that determine customer acquisition and retention
 - Life Cycle. Defines the customer life-cycle stages, such as new, growing, stable, and so on
 - Satisfaction Benchmark. Enables you to enter the customer satisfaction index values for the industry standard or benchmark business plans
 - Satisfaction. Enables system administrators to specify the weights for the subindexes that make up the overall satisfaction index
 - Loyalty. Enables system administrators to specify the range of values and weights for seeded loyalty measures

Note: You can access each of these forms from the Self-Service Administrator Option in the Business Intelligence System.

- Execute concurrent report programs
- Set up users. Add new or existing users to the Customer Intelligence responsibility.

Note: See Appendix C for a list of customer intelligence concurrent programs, their related reports, profile options, and performance measures.



Describing Call Center Intelligence Setup

For Call Center intelligence, you must set up the performance measures related to call rates and average talk times, as well as performance measures related to service-level agreements.

Note: See Appendix C for a summarized list of call center–related performance measures.

Practice 22-1 Overview

Practice 22-1 Overview

This practice covers describing intelligence area setup requirements.

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Overview

In this practice, you answer a series of questions that reinforce the concepts of BIS setup requirements.

Performing This Practice

For detailed instructions on performing this practice, see Practice 22-1 in Appendix A, “Practices and Solutions.”

Practice 22-2 Overview

Practice 22-2 Overview

This practice covers submitting a concurrent program for an intelligence area.

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Overview

In this practice, you submit a concurrent program that gathers data for intelligence area reports.

Performing This Practice

For detailed instructions on performing this practice, see Practice 22-2 in Appendix A, “Practices and Solutions.”

Practice 22-3 Overview

Practice 22-3 Overview

This practice covers viewing intelligence area profile options.

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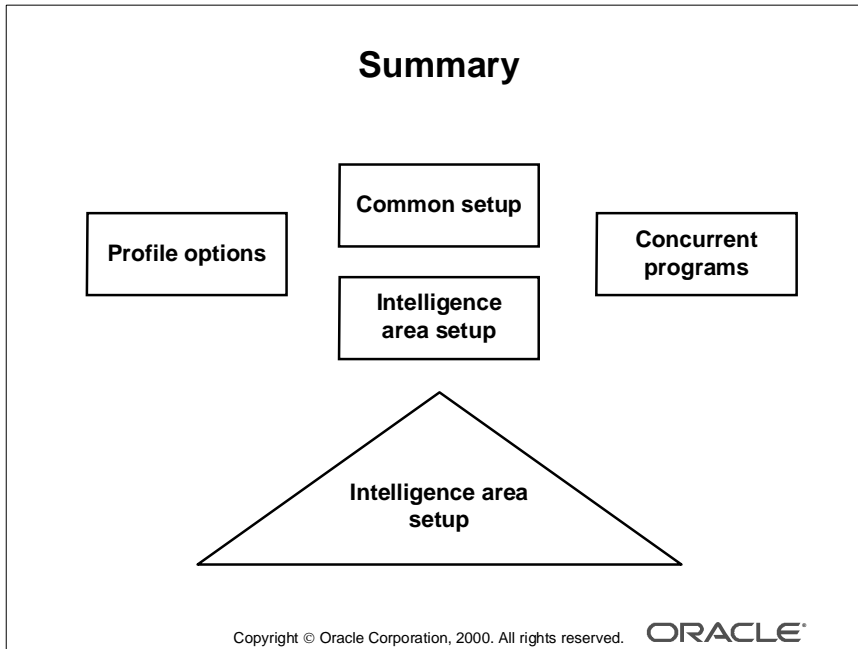
Overview

In this practice, you review a few of the profile options for various intelligence areas.

Performing This Practice

For detailed instructions on performing this practice, see Practice 22-3 in Appendix A, “Practices and Solutions.”

Summary



Summary

This lesson explained the required setup tasks for the BIS intelligence areas. It covered the following topics:

- Profile option setup
- Individual intelligence area setup
- Other setup
- Concurrent programs setup

**Describing BIS
Maintenance
Requirements**

Objectives

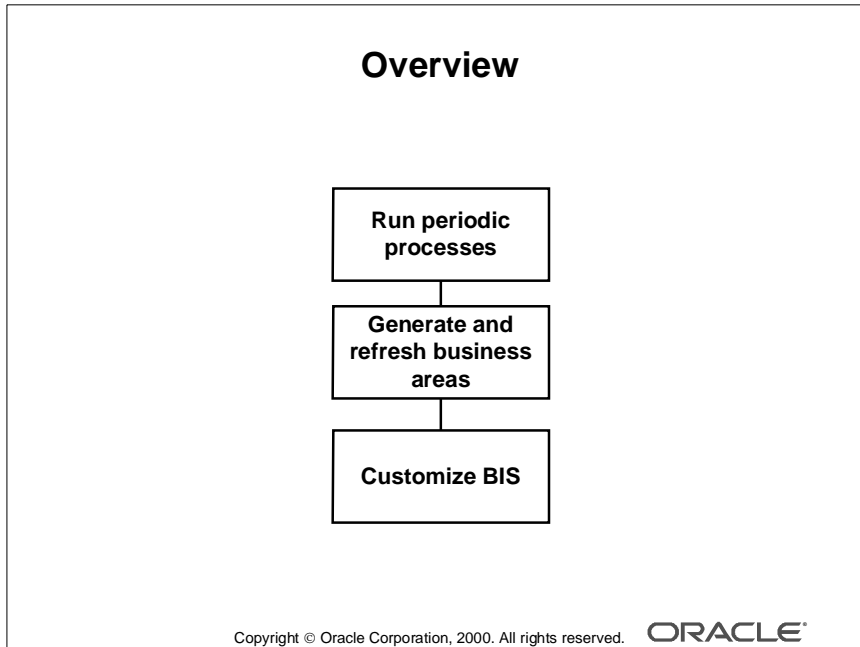
Objectives

After completing this lesson, you should be able to do the following:

- **Describe periodic processes**
- **Describe the business area refresh process**

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Overview

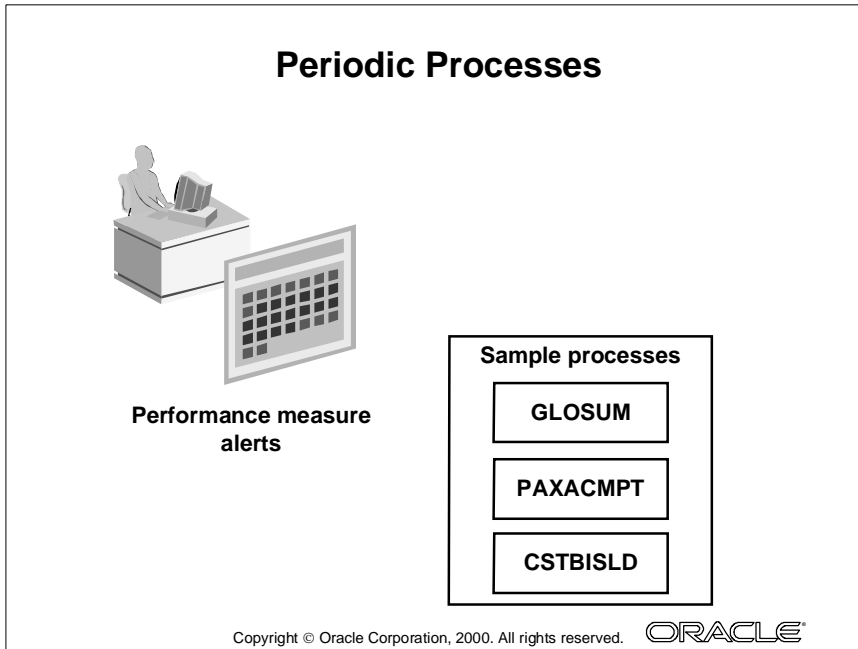


Importance of This Lesson

This lesson explains BIS maintenance requirements. After setting up and running BIS, you should perform the following maintenance requirements:

- Schedule and run periodic processes, such as concurrent report programs and alerts
- Generate business views and refresh Discoverer business areas as needed
- Customize BIS features, such as the personal homepage (PHP)
- Test BIS components, such as the PHP, performance measures, reports, and workbooks

Scheduling



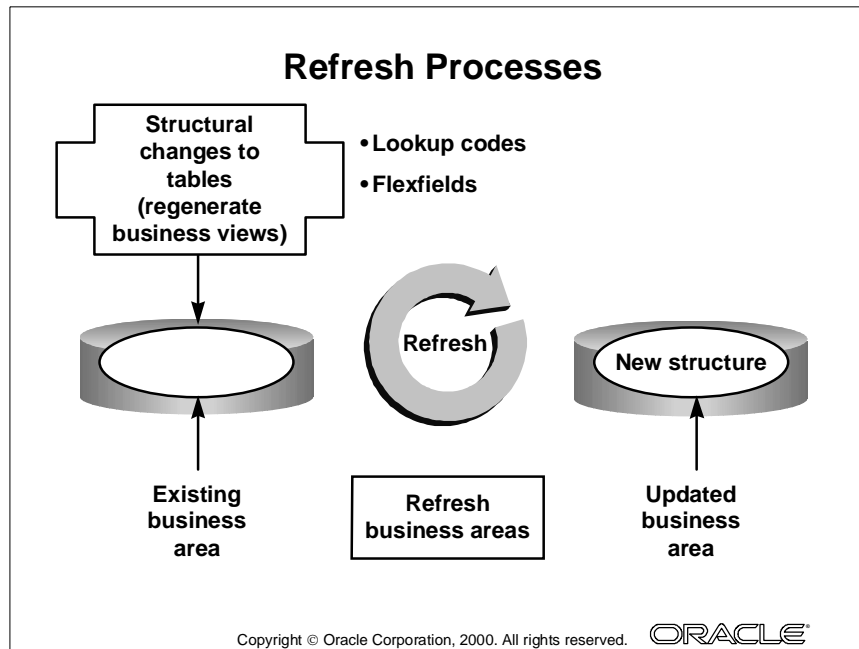
Describing Periodic Processing

Some of the reports available in BIS require that you prepare summarized data before reports are run by users. As noted in the previous lesson, this summarized data is created by running various concurrent programs from Oracle Applications.

To ensure that your BIS users always have up-to-date reports, consider scheduling the concurrent programs to run at specified intervals. To schedule these processes, use the Oracle Applications Standard Request Submissions feature.

You must also determine an acceptable schedule for running performance measure alerts.

Refreshing Business Areas



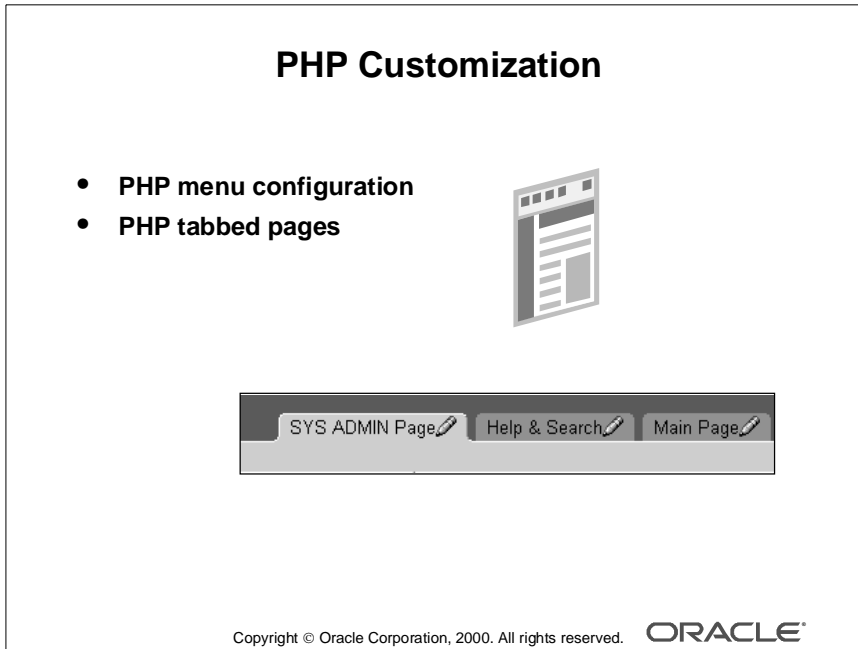
Describing the Refresh Process

Refresh processes ensure that new data from the database appears in business views and their related Discoverer workbooks.

Whenever the structure of the tables is changed, the related business views must be regenerated and the related business areas must be refreshed. Changes to the structure of tables include making changes to any of the following:

- Key flexfields
- Descriptive flexfields
- Lookup codes

Customizing the Personal Homepage



Describing PHP Customization Options

As users become more familiar with BIS, you can assist them in performing the following tasks:

- Customizing the PHP
- Setting up tabbed pages

Customizing the homepage includes changing the menus to suit the user's preference. You might also change the display of the regions on the PHP.

You can also set up different regions on more than one tabbed page. For example, you might place the Performance Measures and Navigate regions on one tabbed page and the Business Views Catalog Search and the Ask Oracle regions on another tabbed page. You can also rename regions to better suit the user's needs.

Note: Every PHP includes the default page called Main Menu. This page cannot be deleted.

Practice 23-1 Overview

Practice 23-1 Overview

This practice covers the following topics:

- Describing periodic processes
- Describing refresh processes

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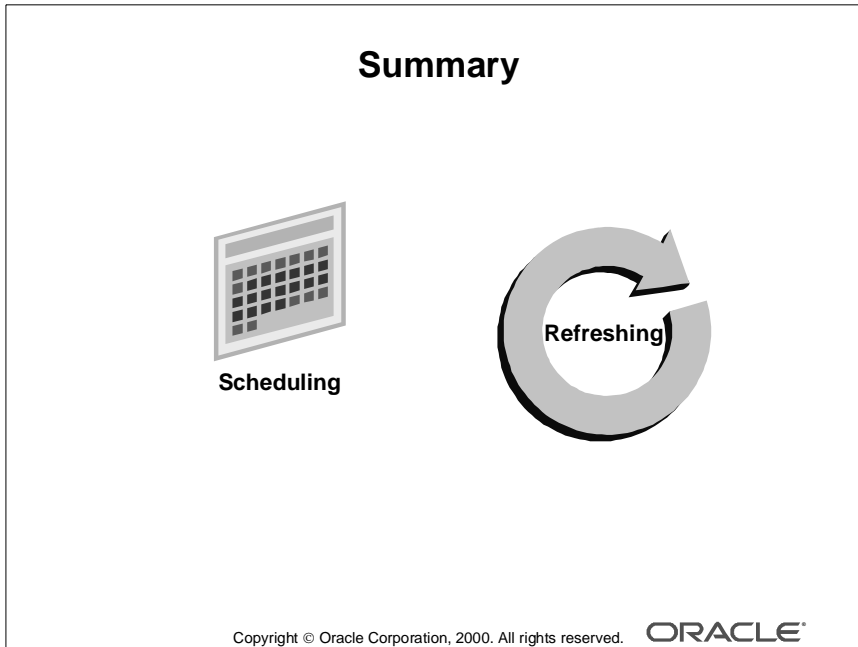
Overview

In this practice, you answer a series of questions that reinforce the concepts of BIS maintenance requirements.

Performing This Practice

For detailed instructions on performing this practice, see Practice 23-1 in Appendix A, “Practices and Solutions.”

Summary



Summary


This lesson described BIS maintenance requirements, including the following:

- Scheduling periodic processes, such as concurrent request programs
- Refreshing BIS business areas

Unit III Setup Considerations

Unit III Setup Considerations

Unit III Setup Considerations



- BIS setup
- Intelligence area setup

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Setup Considerations

When setting up the BIS components discussed in Unit III, consider the following information.

BIS Application Setup Considerations

- Check all of the ICX (Oracle Self Service Web Applications) profiles to make sure that they have been set up correctly and map to the appropriate locations. In pathnames, pay special attention to trailing and leading spaces and slashes.
- When setting up security, consider how various organizations are secured in BIS.
- When you set up calendars in BIS, decide whether to specify custom calendars, which can be set up as “fiscal” calendars, or to use the standard default calendar that comes preseeded with the system.

Intelligence Area Considerations

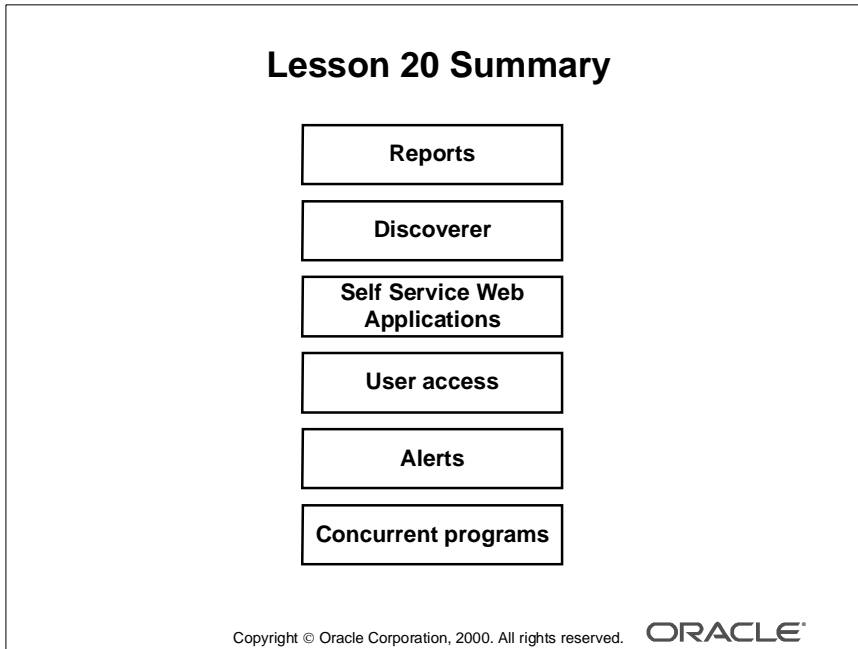
- Make sure that you set up the appropriate profile options for each intelligence area.
- Test intelligence area components to make sure that they are working properly.
- Set up the appropriate security for each intelligence area.

- Make sure that all preseeded components, such as performance measures and alerts, are included for each intelligence area.
- Make sure that you can link to each report for an intelligence area, if not check your report-related ICX profiles.

Note: For more information about BIS setup and troubleshooting, see *Troubleshooting Oracle Business Intelligence System, Release 11i*.

Unit III Summary

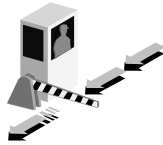
Unit III Summary



Summary

Lesson 20, “Describing BIS Postinstallation steps,” described the postinstallation requirements for the BIS application.

Lesson 21 Summary



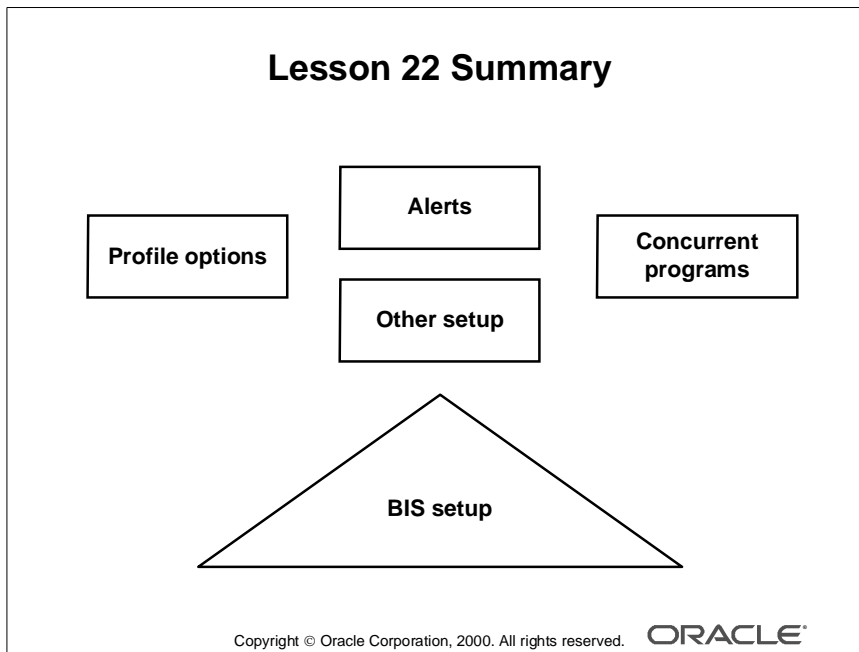
- Business views
- Flexfield mapping
- Geography dimensions
- Browser settings
- Extensible links



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Summary (continued)

Lesson 21, “Setting Up BIS,” explained the setup requirements, such as generating business views and setting up flexfield mapping, for the BIS application.



Summary (continued)

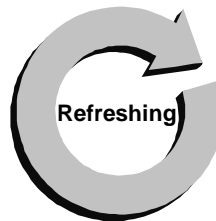
Lesson 22, "Setting Up Intelligence Areas," described the setup requirements for each intelligence area. This lesson explained that in most cases, individual intelligence areas require setup or verification of the following:

- Profile options
- BIS alerts for the intelligence area
- Concurrent programs
- Other setup, such as completing data setup forms and other tasks related to an intelligence area

Lesson 23 Summary



Scheduling



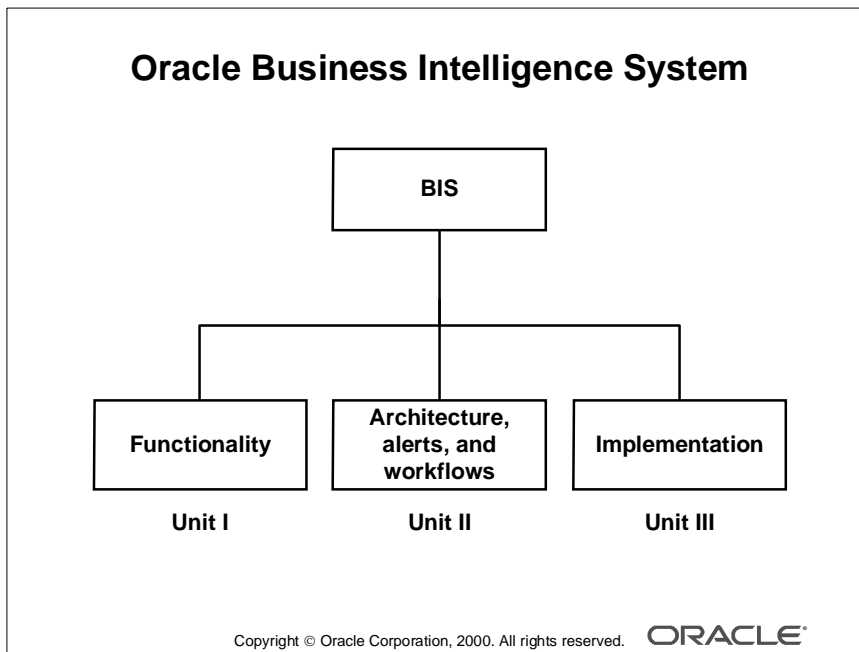
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Summary (continued)

Lesson 23, “Describing BIS Maintenance Requirements,” described some of the maintenance tasks that you should perform after BIS has been set up and used in a production environment.

Course Summary

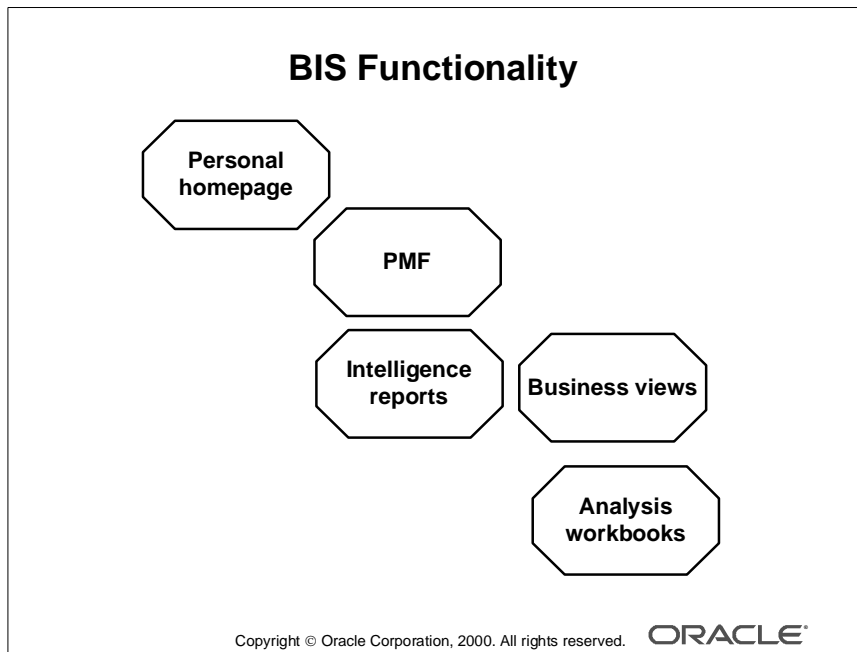
Course Summary



Course Summary

This course introduced the Oracle Business Intelligence System, release 11*i*, and explained implementation requirements for the product. It included the following units:

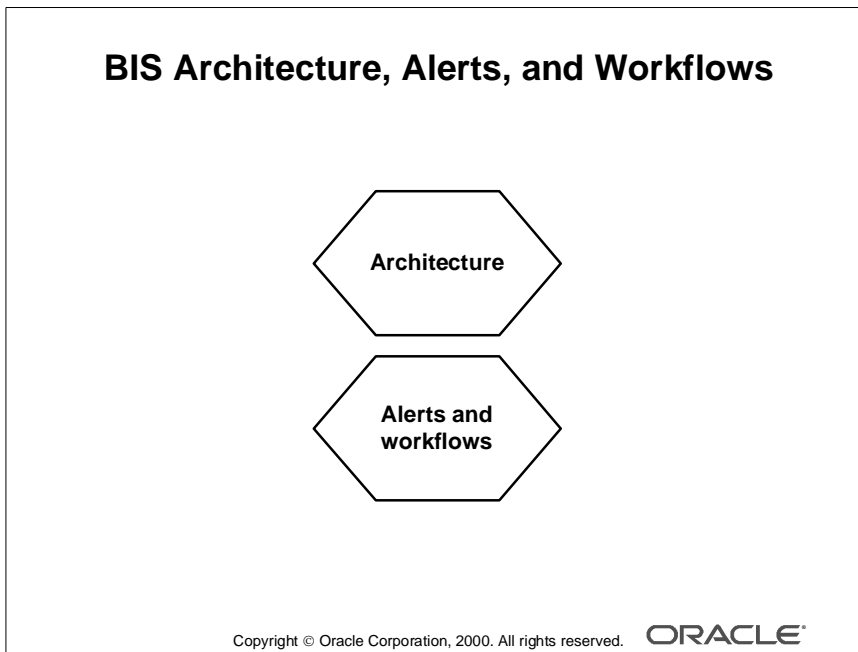
- Unit I, “BIS Functionality”
- Unit II, “BIS architecture, Alerts, and Workflow”
- Unit III, “BIS Implementation”



Course Summary (continued)

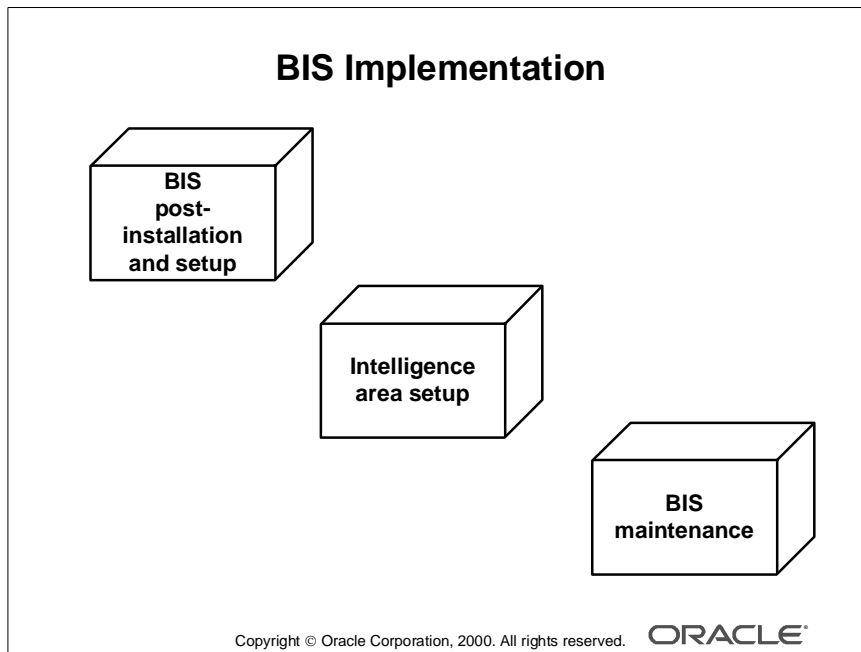
Unit I, “BIS Functionality,” described the BIS product and explained the following BIS components:

- Personal homepage (including homepage customization)
- Performance Management Framework
- Intelligence reports
- Business views
- Analysis workbooks



Course Summary (continued)

Unit II, “BIS Architecture, Alerts, and Workflows,” described the three-tiered computing model and the BIS architecture. This unit also introduced Oracle Alert and Workflow and explained how these two products work within the BIS application.



Course Summary (continued)

Unit III, “BIS Implementation,” described the BIS postinstallation steps. This unit also covered the setup requirements for the BIS application and the individual intelligence areas. Finally, Unit III covered BIS maintenance requirements.

A

Practices and Solutions

Practices Introduction

Practice User IDs and Passwords

In many of the following practices, you will be using one or more of the users listed in the table. In addition to the responsibilities mentioned in the table, each user needs to be assigned the Preferences responsibility.

User ID	Password	Name	User Description
xxpbluer	welcome	Pat Bluer	BIS system administrator. As the system administrator, Pat has access to all of the intelligence area responsibilities, as well as to alerts, workflows, and system administration.
xxkorange	welcome	Kim Orange	A human resources manager at Vision Corporation, assigned the Human Resources intelligence responsibility. Kim is a new BIS user. Kim often fills in for operations and finance managers, so she has also been assigned the Operations and Financials Intelligence responsibilities.
xxJwright	welcome	James Wright	A department manager at Vision Corporation and an existing BIS user. James has access to the Operations and Human Resources responsibilities. James sometimes acts as the department's BIS superuser, so he also has access to the following responsibilities: <ul style="list-style-type: none">– BIS Super User– Business Views Setup– Alert Manager– Performance Management Framework (Full Access)

Throughout the following practices, wherever you see xx, substitute your terminal or student ID number as indicated by the instructor.

Practice 3-1

Describing BIS

Circle the best answer for each of the following statements.

- 1 Which of the following BIS components enables you to set specific goals for a particular business area?
 - a Business views
 - b Analysis workbooks
 - c Performance measures
 - d Intelligence reports
 - e Personal homepage
- 2 Which of the following enables you to access important details about your business and even customize it to suit your personal business needs?
 - a Business views
 - b Analysis workbooks
 - c Performance measures
 - d Intelligence reports
 - e Personal homepage
- 3 These represent the underlying data on which analysis workbooks draw much of their information.
 - a Business views
 - b Analysis workbooks
 - c Performance measures
 - d Intelligence reports
 - e Personal homepage
- 4 These are Oracle Discoverer–based and enable you to further review and analyze a variety of business areas.
 - a Business views
 - b Analysis workbooks
 - c Performance measures
 - d Intelligence reports
 - e Personal homepage

Describing BIS (continued)

- 5** Which of the regions on the PHP would you use to display the actual values associated with a particular business metric?
- a** Performance Measures
 - b** Ask Oracle
 - c** Favorites
 - d** Navigate
- 6** Which of the regions on the PHP would you use to navigate to intelligence areas and other non-BIS applications?
- a** Performance Measures
 - b** Ask Oracle
 - c** Favorites
 - d** Navigate
- 7** Which region on the PHP would you use to obtain context-sensitive Help?
- a** Performance Measures
 - b** Ask Oracle
 - c** Favorites
 - d** Navigate
- 8** Which region on the PHP would you use to set up links to internal or external Web sites?
- a** Performance Measures
 - b** Ask Oracle
 - c** Favorites
 - d** Navigate
- 9** Which of the following represents the purpose of the Performance Management Framework (PMF)?
- a** The PMF is the entire foundation of Oracle Applications.
 - b** The PMF replaces Oracle Alert.
 - c** The PMF is part of the Business Views Search Catalog.
 - d** The PMF enables you to monitor business performance through the use of actual business metrics and user-defined targets.
 - e** The PMF directly communicates with legacy systems to obtain historical business values.

Describing BIS (continued)

- 10** Ann Green provides technical support for a small manufacturing department. She is responsible for setting up the department's Discoverer End User Layer. She is a little confused about which of the following items should be business areas versus folders. For each of the following, write an F next to those items that would most likely be folders, and write a B next to those items that would most likely be business areas.

Hint: There are only three business areas included in the following list. Also, remember that business areas are typically broad, whereas folders typically represent a subset of a business area. Remember, business areas represent an Oracle Application product.

- a** ☐ Accounts payable
- b** ☐ Bank accounts
- c** ☐ Accounts receivable
- d** ☐ AR invoices
- e** ☐ Debits
- f** ☐ Bills of material and engineering
- g** ☐ Bill of materials
- h** ☐ Work order routings

Practice 3-1 Solutions

Describing BIS

Circle the best answer for each of the following statements.

- 1 Which of the following BIS components enables you to set specific goals for a particular business area?
 - a Business views
 - b Analysis workbooks
 - c **Performance measures**
 - d Intelligence reports
 - e Personal homepage
- 2 Which of the following enables you to access important details about your business and even customize it to suit your personal business needs?
 - a Business views
 - b Analysis workbooks
 - c Performance measures
 - d Intelligence reports
 - e **Personal homepage**
- 3 These represent the underlying data on which analysis workbooks draw much of their information.
 - a **Business views**
 - b Analysis workbooks
 - c Performance measures
 - d Intelligence reports
 - e Personal homepage
- 4 These are Oracle Discoverer-based and enable you to further review and analyze a variety of business areas.
 - a Business views
 - b **Analysis workbooks**
 - c Performance measures
 - d Intelligence reports
 - e Personal homepage

Describing BIS (continued)

- 5 Which of the regions on the PHP would you use to display the actual values associated with a particular business metric?
- a **Performance Measures**
 - b Ask Oracle
 - c Favorites
 - d Navigate
- 6 Which of the regions on the PHP would you use to navigate to intelligence areas and other non-BIS applications?
- a Performance Measures
 - b Ask Oracle
 - c Favorites
 - d **Navigate**
- 7 Which region on the PHP would you use to obtain context-sensitive Help?
- a Performance Measures
 - b **Ask Oracle**
 - c Favorites
 - d Navigate
- 8 Which region on the PHP would you use to set up links to internal or external Web sites?
- a Performance Measures
 - b Ask Oracle
 - c **Favorites**
 - d Navigate
- 9 Which of the following represents the purpose of the Performance Management Framework (PMF)?
- a The PMF is the entire foundation of Oracle Applications.
 - b The PMF replaces Oracle Alert.
 - c The PMF is part of the Business Views Search Catalog.
 - d **The PMF enables you to monitor business performance through the use of actual business metrics and user-defined targets.**
 - e The PMF directly communicates with legacy systems to obtain historical business values.

Describing BIS (continued)

Ann Green provides technical support for a small manufacturing department. She is responsible for setting up the department's Discoverer End User Layer. She is a little confused about which of the following items should be business areas versus folders. For each of the following write an F next to those items that would most likely be folders, and write a B next to those items that would most likely be business areas.

Hint: There are only three business areas included in the following list. Also, remember that business areas are typically broad, whereas folders typically represent a subset of a business area. Remember, business areas represent an Oracle Application product.

- a** **B** Accounts payable
- b** **F** Bank accounts
- c** **B** Accounts receivable
- d** **F** AR invoices
- e** **F** Debits
- f** **B** Bills of material and engineering
- g** **F** Bill of materials
- h** **F** Work order routings

Practice 4-1

Describing the Personal Homepage

- 1 You use the PHP to access performance measures, reports, and a host of other BIS features.
 - a True
 - b False
- 2 You can customize page tabs using the Customize option in the Performance Measures region.
 - a True
 - b False
- 3 Both the Navigate and Favorites regions enable you to jump to another part of the BIS system or another Oracle Application.
 - a True
 - b False
- 4 Jim wants to review a revenue report. The only way that he can perform this action in BIS is to add the report to his Favorites region.
 - a True
 - b False
- 5 You use the Performance Measures region to view actual business metrics that you want to monitor.
 - a True
 - b False
- 6 The Ask Oracle region is a context-sensitive Help engine that provides you with help about other BIS regions.
 - a True
 - b False

Describing the Personal Homepage (continued)

7 Use the word list following these icons to label each icon with the correct definition.

















Word List

- a** Add Row
- b** Help
- c** Delete Region
- d** Create and Modify Pages
- e** Add Column
- f** Return to Homepage
- g** Edit Appearance
- h** Exit

Practice 4-1 Solutions

Describing the Personal Homepage

- 1 You use the PHP to access performance measures, reports, and a host of other BIS features.
 - a **True**
 - b False
- 2 You can customize page tabs using the Customize option in the Performance Measures region.
 - a True
 - b **False. To customize page tabs, you must click on the Create and Modify Pages icon located in the banner of the PHP.**
- 3 Both the Navigate and Favorites regions enable you to jump to another part of the BIS system or another Oracle Application.
 - a **True. Remember that you must set up your own links in the Favorites region.**
 - b False
- 4 Jim wants to review a revenue report. The only way that he can perform this action in BIS is to add the report to his Favorites region.
 - a True
 - b **False. Jim can add a report to his Favorites region, but he can quickly access a revenue report by selecting the Financials Intelligence option in the Navigate region and then clicking on the appropriate revenue report.**
- 5 You use the Performance Measures region to view actual business metrics that you want to monitor.
 - a **True**
 - b False
- 6 The Ask Oracle region is a context-sensitive Help engine that provides you with help about other BIS regions.
 - a True
 - b **False. The Ask Oracle region provides you with a context-sensitive search engine that enables you to search for intelligence reports.**

Describing the Personal Homepage (continued)

- 7 Use the word list following these icons to label each icon with the correct definition



e



h



c



f



d



b



g



a

Word List

- a Add Row
- b Help
- c Delete Region
- d Create and Modify Pages
- e Add Column
- f Return to Homepage
- g Edit Appearance
- h Exit

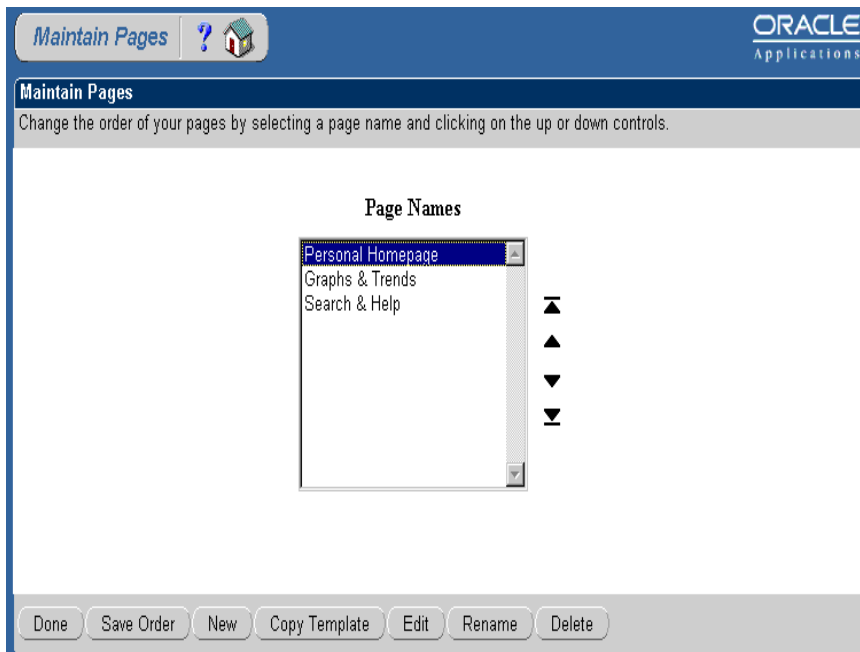
Guided Practice 4-2

Navigating the PHP

In this guided practice, follow the instructions to log into BIS and navigate the PHP. Wherever you see xx, substitute your student or terminal number.



- 1 Open the Netscape Navigator and enter the URL assigned by the instructor.
The BIS sign-on window appears.
- 2 Enter a login name of xxjwright and a password of welcome.
The BIS PHP for James opens.
- 3 Scroll on this page and click the tabbed pages to see how they respond.
In this case, James has set up the following custom pages:
 - Performance
 - Navigate
 - Help and Search
 The page labeled Main Menu represents the default page.
- 4 After you finish navigating around the PHP, click the question mark icon located in the page banner to view Help about the personal homepage regions.
- 5 Exit Help and return to the PHP.
- 6 Next, click the Create and Modify Pages icon.
The Maintain Pages window appears.



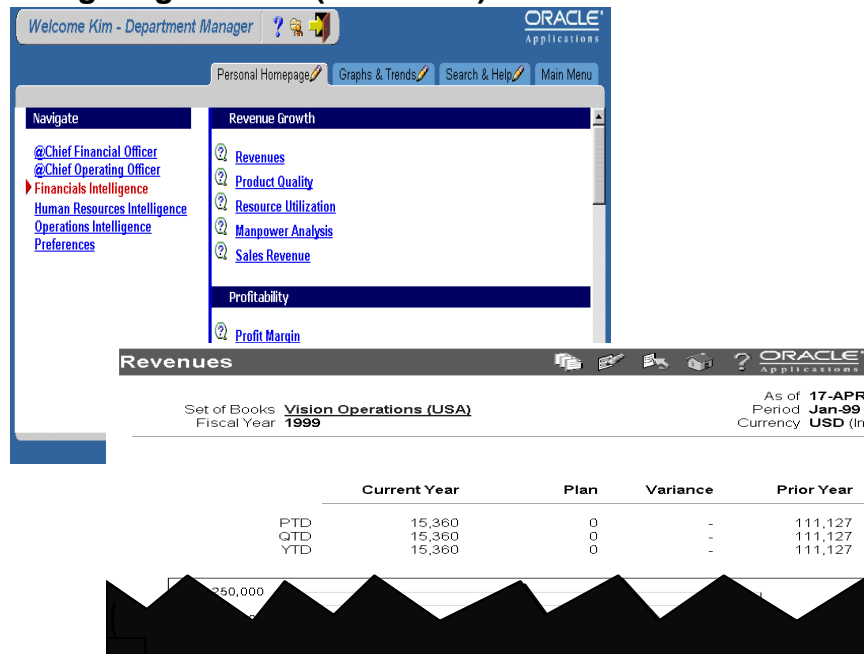
- 7** At this point, do not customize anything, however, select one of the page names and then click the Edit button.

The Customize Page window opens. Review James's setup for the page that you selected.

- 8** When you are finished, click the Return to Homepage icon (located in the banner of the window) to return to the PHP.

Note: This practice continues on the following page.

Navigating the PHP (continued)



Viewing Reports

- 1 From the PHP Navigate region, select the Financials Intelligence link.
The Financials Intelligence focus area opens. The reports and workbook links associated with Financials Intelligence are displayed.
- 2 In the Revenue Growth region, click the Revenues report link.
The BIS Revenues report parameter page appears.
- 3 Select Jan-99 from the list of values and then click the OK button.
The Revenues report appears. The slide shows a partial Revenues report.
Note: This might take several seconds.
- 4 Review the report. Use the window's vertical and horizontal scroll bars to view different sections of the report. Notice that the report includes a trends graph.
- 5 Click the Related Reports icon to jump to the Related Reports section of the page.
- 6 Click the Profit Margins link under the Related Reports section.
The Profit Margins report appears.
- 7 Click the Related Reports icon to jump to the bottom of the Profit Margins report.
- 8 Click the Revenues report link to return to the Revenues report.
- 9 Click the Parampage icon, change the report date to Feb-99, and click the OK button.

Viewing Reports (continued)

The Revenues report runs for February 1999.

10 Click the Menu icon to return to the Financials Intelligence menu.



Base_Price	SUM	Item_Description	Item_Number
80		LWC 50 GSM 4000MM	7370
138		Floor Tile 12x12 Alaska Rustic Stone Resident Normal	ALASKA-01
414		Floor Tile 6x6 Alaska Rustic Stone Resident Normal	ALASKA-03
120		GINALLES FETTUCINE (24 X 16 OZ PACKAGES)	DCA8100
68		GINALLES PENNE (24 X 16 OZ PACKAGES)	DCA8200
2		No Controls Item	OPM100
49		Dual2, lot, subplot, loc1, grade, status, autoalloc Item	OPM110
14		Dual2, Loc2, Lot, Sublot, Grade, Status Item	OPM111
15		Dual3, loc, lot, subplot, grade, status Item	OPM112
1		Location Item	OPM113
9		Lot, INDIV, Sublot, Grade, Status Item	OPM116

Viewing Analysis Workbooks

- 1 If it is not already open, click the Financials Intelligence link in the Navigate region.
- 2 Scroll down to the Cash region.
- 3 Click the Cash Flow Analysis link.
Discoverer 3i is automatically launched. Please be patient; it might take a several seconds to a few minutes for Discoverer to launch.
- 4 View the workbook and the various workbook options. When you are finished, exit the workbook.

Practice 5-1

Customizing the Personal Homepage

Pat Bluer is a consultant responsible for implementing BIS at Vision Corporation. Pat's first assignment is to assist in setting up Kim Orange's personal homepage. Kim is an HR manager at Vision Corporation.

This practice assumes that Kim has been assigned several responsibilities, including the Human Resources, Operations, and Finance intelligence responsibilities. Log into BIS using Kim's username and password, indicated below. Wherever you see xx, substitute your student or terminal number.

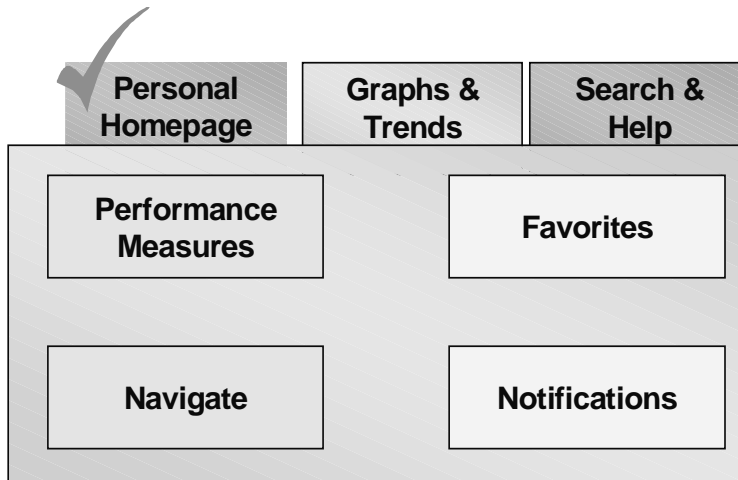
Using the information from Lesson 5 and the following information, set up Kim's PHP.

Setup Item	Contents or Instructions
Kim's username	xxkorange
Kim's password	welcome
PHP Banner	Kim Orange - HR Manager
Preferences options	Accept the defaults
Page Setup	(Kim would like three tabbed pages)
Tab 1	Personal homepage. Set the width to 50 for each region on this page.
Tab 2	Graphs and Trends
Tab 3	Search and Help
Tab 4	Main Menu Default tab. Remember that this tabbed page is the default navigation page. Kim does not want any changes made to this page.

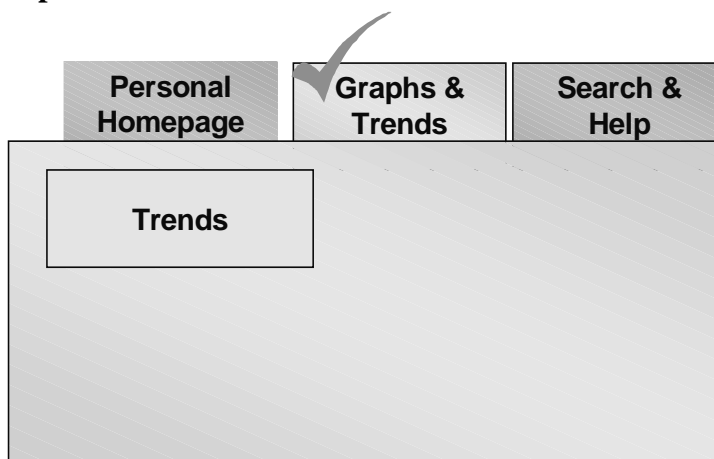
The following diagrams depict the regions that Kim wants on each tabbed page. The check mark indicates the tab to which the corresponding regions refer.

Customizing the Personal Homepage (continued)

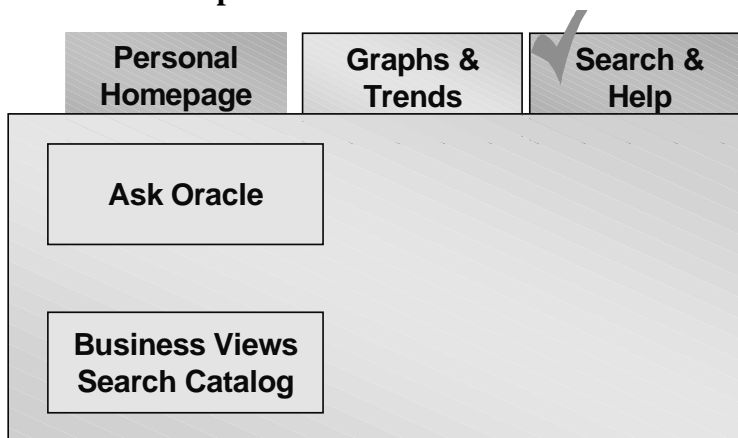
Personal Homepage Tab



Graphs and Trends Tab



Search and Help Tab



Customize Link Options

Kim would also like to customize the Favorites and Notifications regions:

- Favorites links
 - Human Resources Responsibility: Workforce Trends and Hours Worked
 - Custom favorite: `http://www.oracle.com`, Name: Oracle Corp.
 - Custom favorite: `http://www.yahoo.com`, Name: Yahoo
- Notifications
 - Column 1: Due
 - Column 2: Subject
 - Column 3: Sent
 - Order by: Priority
 - Kim wants to review only high-priority notifications.
 - Accept the default selections for the remainder of fields in this form.

Practice 5-1 Solutions

Customizing the Personal Homepage

Note: Your solutions may vary from the ones presented here.

Editing Preferences

- 1 Log into BIS using Kim username (xxkorange , replace xx with your student number) and password (welcome).
- 2 In the Navigate region, select the Preferences link, and then select General Preferences.
- 3 In the Known As field, enter Kim Orange - Finance Manager
- 4 Accept the defaults on the remainder of this page.
- 5 Click the Apply button when you are finished.

The main PHP automatically reopens.

Setting Up Tabbed Pages

Note: These instructions explain how to set up one page. For additional pages, follow these instructions and change the page name appropriately.

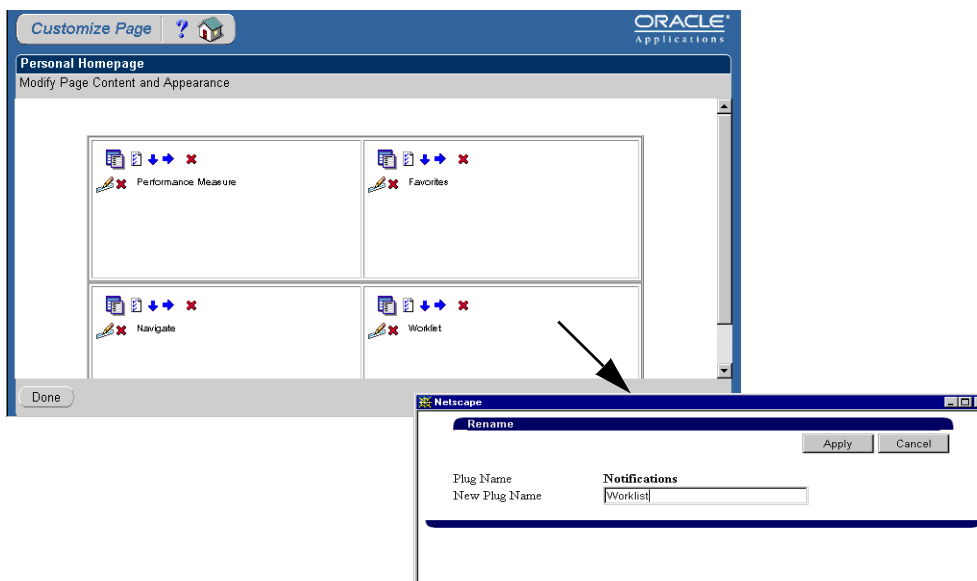
- 1 Click the Modify and Create Pages tab.
The Maintain Pages window opens.
- 2 Click the New button and enter the name Personal Homepage in the New Page Name field of the Create New dialog window.
- 3 When you finish entering the page name, click the Apply button.
The Customize Page window opens and one region appears.
- 4 In this region, click the Add Row icon to add row to the page.
You now have two rows on this page.
- 5 In the top row, click the Add Column icon to add a column to this row.
You now have two columns associated with the first row.
- 6 In the second row, click the Add Column icon to add a column to this row.

Customizing the Personal Homepage (continued)

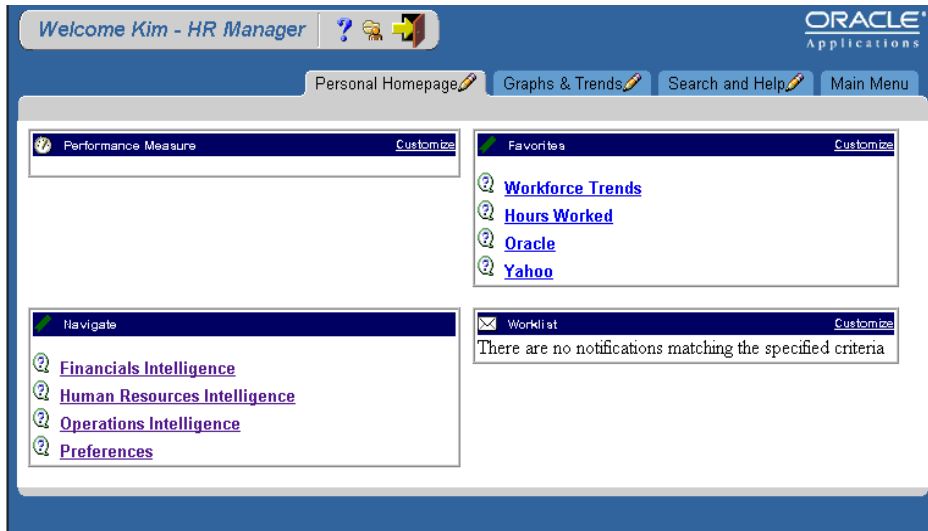
You should now have two columns and two rows for this page. Next, you will add the region names to each column and row.

- 7 In the upper-left region, click the Edit Content icon, and select Performance Measure region.
- 8 In the upper-right region, click the Edit Content icon, and select Favorites.
- 9 In the lower-left region, click the Edit Content icon, and select the Navigate region.
- 10 In the lower-right region, click the Edit Content icon, and select the Worklist region.
- 11 In the Notification region, click the Rename icon to rename the Worklist region to Worklist.
- 12 Set the width of each region to 50 by clicking the Edit Appearance icon in each region and entering 50 in the Width field.
- 13 When you finish, click the Done button.
- 14 Follow steps 1 through 10 to set up the remaining tabbed pages.

Personal Homepage Tab

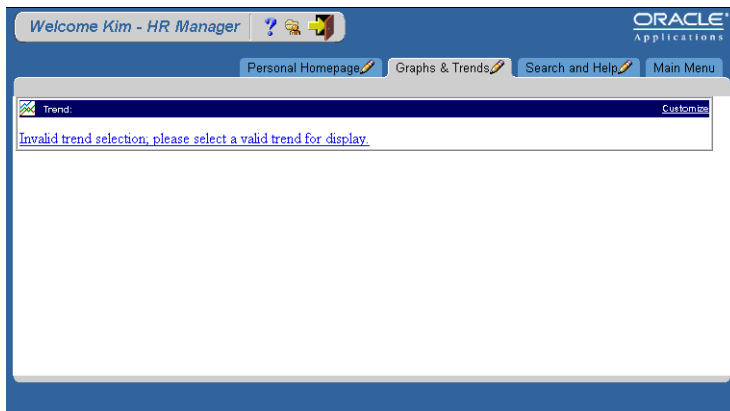
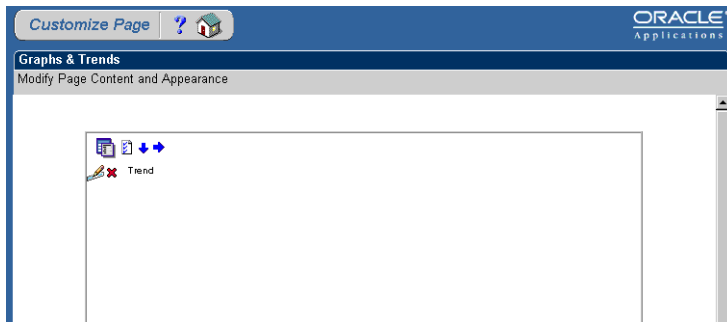


Customizing the Personal Homepage (continued)



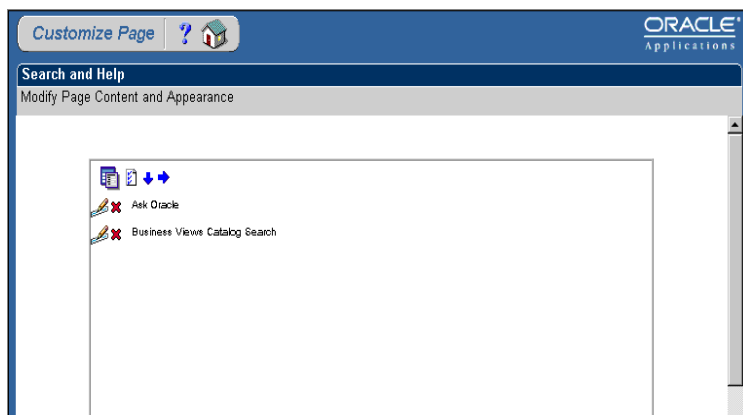
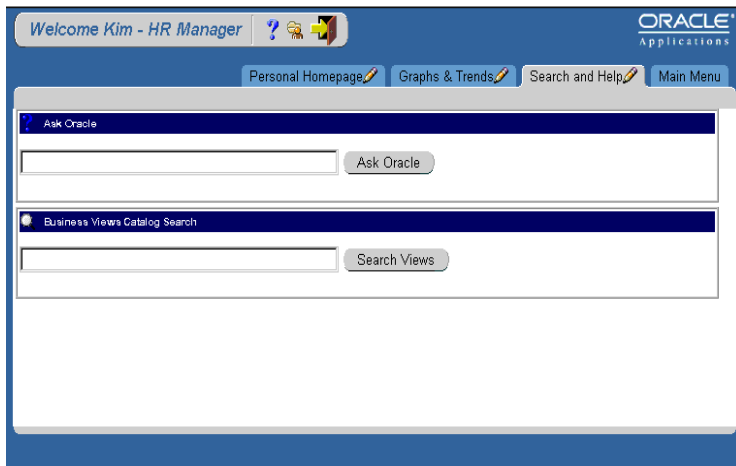
Customizing the Personal Homepage (continued)

Graphs and Trends Tab



Customizing the Personal Homepage (continued)

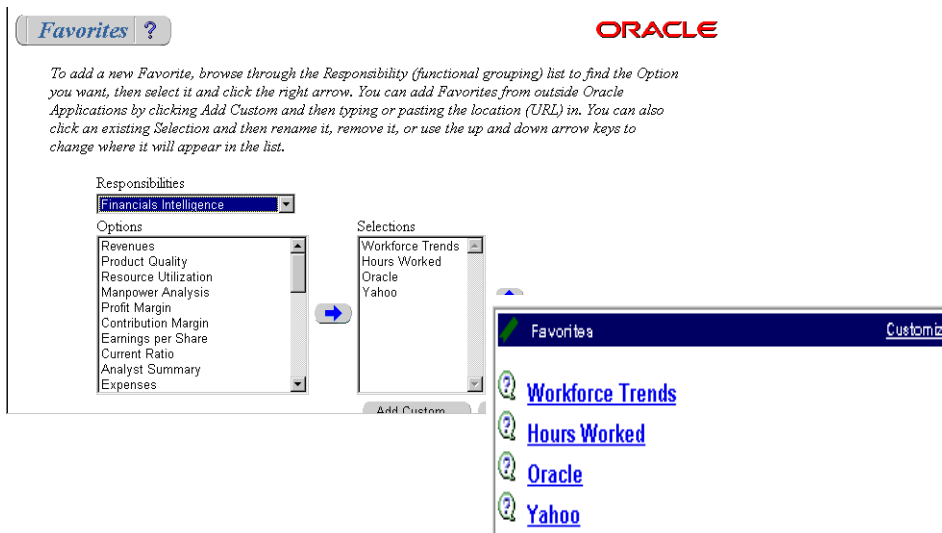
Search and Help Tab



Customizing the Personal Homepage (continued)

Customizing the Favorites Region

- 1 Click the Customize link in the Favorites region.
The Favorites window opens.
- 2 From the Responsibilities list of values, select the Human Resources responsibility.
- 3 From the Options list, select the Workforce Trends and the Hours Worked options.
- 4 Click the Add Custom... button and enter the following URL information:
`http://www.oracle.com`, Name: Oracle
- 5 Click the Add Custom... button again to enter the second custom URL:
`http://www.yahoo.com`, Name: Yahoo
- 6 Click the OK button to save your work and return to the personal homepage.
The Favorites region contains the links that you added.



Customizing the Worklist (Notifications) Region

- 1 Click the Customize link in the Worklist region.
The Notifications window opens.
- 2 Select Due from the Column 1 list of values.
- 3 Select Subject from the Column 2 list of values.
- 4 Select Sent from the Column 3 list of values.
- 5 Leave Column 4 blank.
- 6 Clear the Medium and Low Priority Notification check boxes.
- 7 Select Priority from the Order By list of values.
- 8 Click the Done button to save your work and return to the Notifications region.
Because Kim does not currently have any notifications, the formatting options that you selected will not appear in the Worklist region.

Customizing the Personal Homepage (continued)

Worklist

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Choose up to 4 columns of information to show for notifications on your home page. Select the "Blank" option for all lists beyond those you want shown. You can also choose the order of the notifications and limit which notifications are escalated to your home page using the other options.

Worklist Display Columns

Column 1	Column 2	Column 3	Column 4	Order By
Due	Subject	Sent	Blank	Priority

Show Me Only...

Notifications From

Notification Type

Sent in the last (days)

☒ High Priority Notifications

Practice 6-1

Describing Performance Measures

Circle or write the best answer for each of the following questions.

- 1 Which of the following is not a PMF component?
 - a Target levels
 - b Performance measures
 - c Business views
 - d Targets
- 2 John Statin is responsible for setting up performance measures for the A&B corporation. The company wants to report sales by geographic location. To ensure the company gets sales information by geographic location, what subcomponent of the PMF must John specify when he sets up the performance measure?
 - a Target level
 - b Target
 - c Dimension
 - d Access responsibility
- 3 Sally Copeland is a consultant responsible for setting up performance measures for the Green Flower Company. The company wants top management to be notified only if actual values exceed goals by 50 percent. Assuming that Sally has set up all the required PMF components, which subcomponent of the PMF must Sally set up to determine if an actual value exceeds a goal?
 - a Target level
 - b Target
 - c Dimension
 - d Access responsibility
- 4 Which of the following is *not* part of setting up a target level?
 - a Target-level definition
 - b Dimension level
 - c Target details
 - d Access responsibilities
- 5 Which *two* of the following *are not* included when setting up a target?
 - a Target-level definition
 - b Target description
 - c Corrective action type
 - d Target details

Describing Performance Measures (continued)

6 In the following diagram, write the appropriate subcomponents of the PMF:

PMF Subcomponents		
<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Performance measures </div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px;"></div>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Target Levels </div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px;"></div>	<div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> Targets Details </div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px; margin-bottom: 5px;"></div> <div style="border-bottom: 1px solid black; height: 15px;"></div>

1-1
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ORACLE

- 7 Accounts receivable turnover and inventory turns are examples of which component of the PMF?
- Targets
 - Actual values
 - Performance measures
 - Target levels
- 8 The VP of sales just received an e-mail stating that sales fell well below expectations. The e-mail that the VP received is an example of which of the following:
- Computing function
 - Tolerance range
 - Corrective action notification
 - BIS setup notification
- 9 Assume that the regional manager has indicated that only department managers and above can view certain performance measures. Which of the following forms would you use to set up the appropriate authorization level?
- Performance Measures form
 - Targets form
 - Personal homepage
 - Target Levels form

Describing Performance Measures (continued)

- 10** Label the steps in the PMF setup process with a 1, 2, or 3 to describe their appropriate setup order.
- a** _____ Define targets
 - b** _____ Define performance measures
 - c** _____ Define target levels
- 11** Assuming that an appropriate notification responsibility was assigned to a tolerance range, if a target equals \$100 and you set up a below-target percentage of 30% and an above-target percent of 60%, for which values would a notification would be sent? Also show the percentages that you would enter in the BIS Targets form in the Below and Above target fields. Round your answers to the nearest whole number.

Mini Case Study

- 12** You are assisting a Vision Operations client with setting up their performance management framework. In particular, you are working on setting up the target and tolerance ranges for the Accounts Receivable Turnover measure. The client has provided you with the following information:
- The unit of measure associated with this measure is days.
 - The client requests that the following responsibilities be notified about out-of-range actuals:
 - Chief Financial Officer responsibility
 - Finance Manager responsibility
 - Finance Intelligence responsibility
 - The target is 30 days.
 - The company requests that you set up the following tolerances:
 - Notify the Chief Financial Officer responsibility when collections are exceed 90 days.
 - Notify the Finance Manager responsibility whenever collections exceed 60 days and fall below 20 days.
 - Notify the Finance Intelligence responsibility whenever collections exceed 40 days.

Describing Performance Measures (continued)

Using the information presented above, determine the appropriate above and below tolerance percentages required to meet the client's request. Use the following table to record the results of your calculations. Round your answers to the nearest whole numbers.

Note: If you do not have a calculator, use the one provided with the Windows operating system, under the Accessories program option. Use the following navigation path to access this calculator:

(B) Start—>Programs—>Accessories—>Calculator

Responsibility	Low Range (percent)	High Range (percent)	Range (in days)
Chief Financial Officer			
Finance Manager			
Finance Intelligence			

Practice 6-1 Solutions

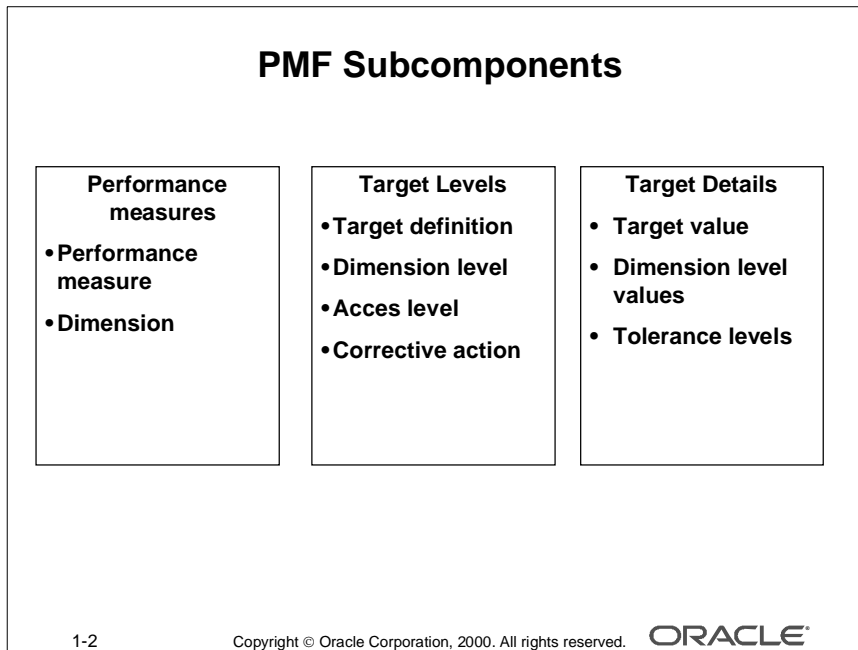
Describing Performance Measures

Circle or write the best answer for each of the following questions.

- 1 Which of the following is not a PMF component?
 - a Target levels
 - b Performance measures
 - c **Business views**
 - d Targets
- 2 John Statin is responsible for setting up performance measures for the A&B Corporation. The company wants to report sales by geographic location. To ensure that the company gets sales information by geographic location, what subcomponent of the PMF must John specify when he sets up the performance measure?
 - a Target level
 - b Target
 - c **Dimension**
 - d Access responsibility
- 3 Sally Copeland is a consultant responsible for setting up performance measures for the Green Flower Company. The company wants top management to be notified only if actual values exceed goals by 50 percent. Assuming that Sally has set up all the required PMF components, which subcomponent of the PMF must Sally set up to monitor if an actual value exceeds a goal?
 - a Target level
 - b **Target**
 - c Dimension
 - d Access responsibility
- 4 Which of the following is *not* part of setting up a target level?
 - a Target-level definition
 - b Dimension level
 - c **Target details. This is a subcomponent of a target.**
 - d Access responsibilities
- 5 Which *two* of the following are *not* included when setting up a target?
 - a **Target-level definition**
 - b Target description
 - c **Corrective action type. This is a subcomponent of target-level setup.**
 - d Target details

Describing Performance Measures (continued)

6 In the following diagram, write the appropriate subcomponents of the PMF:



- 7 Accounts receivable turnover and inventory turns are examples of which component of the PMF?
- Targets
 - Actual values
 - Performance measures**
 - Target levels
- 8 The VP of sales just received an e-mail stating that sales fell well below expectations. The e-mail that the VP received is an example of which of the following:
- Computing function
 - Tolerance range
 - Corrective action notification**
 - BIS setup notification
- 9 Assume that the regional manager has indicated that only department managers and above can view certain performance measures. Which of the following forms would you use to set up the appropriate authorization level?
- Performance Measures form
 - Targets form
 - Personal homepage
 - Target Levels form**

Describing Performance Measures (continued)

- 10** Label the steps in the PMF setup process with a 1, 2, or 3 to describe their appropriate setup order.
- a** 3 Define targets
 - b** 1 Define performance measures
 - c** 2 Define target levels
- 11** Assuming that an appropriate notification responsibility was assigned to a tolerance range, if a target equals \$100 and you set up a below-target percentage of 30% and an above-target percentage of 60%, for which values would a notification would be sent? Also show the percentages that you would enter in the BIS Targets form in the Below and Above target fields. Round your answers to the nearest whole number.

A notification would be sent for actual values under \$70 and above actual values of \$160.

Below-target calculation:

$$\text{\$100} \times -30\% = -\text{\$30}$$

$$\text{\$100} - \text{\$30} = \text{\$70}$$

Above-target calculation

$$\text{\$100} \times 60\% = \text{\$60}$$

$$\text{\$100} + \text{\$60} = \text{\$160}$$

BIS Below Target %: -30%

BIS Above Target %: +60%

Mini Case Study

- 12** You are assisting a Vision Operations client with setting up their performance management framework. In particular, you are working on setting up the target and tolerance ranges for the Accounts Receivable Turnover measure. The client has provided you with the following information:
- The unit of measure associated with this measure is days.
 - The client requests that the following responsibilities be notified about out-of-range actuals:
 - Chief Financial Officer responsibility
 - Finance Manager responsibility
 - Finance Intelligence responsibility
 - The target is 30 days.
 - The company requests that you set up the following tolerances:
 - Notify the Chief Financial Officer responsibility whenever collections exceed 90 days.
 - Notify the Finance Manager responsibility whenever collections exceed 60 days and fall below 20 days.
 - Notify the Finance Intelligence responsibility whenever collections exceed 40 days.

Mini Case Study (continued)

Using the information presented above, determine the appropriate above and below tolerance percentages required to meet the client's request. Use the following table to record the results of your calculations. Round your answers to the nearest whole numbers.

Note: If you do not have a calculator, use the one provided with the Windows operating system, under the Accessories program option. Use the following navigation path to access this calculator:

(B) Start—>Programs—>Accessories—>Calculator

Responsibility	Low Range (in days)	High Range (in days)
Chief Financial Officer	None	$30 \text{ days} \times 200\% = 60 \text{ days}$ $30 \text{ days} + 60 \text{ days} = \mathbf{90 \text{ days}}$
Finance Manager	$30 \text{ days} \times (-33\%) = -10 \text{ days}$ $30 \text{ days} - 10 \text{ days} = \mathbf{20 \text{ days}}$	$30 \text{ days} \times 100\% = 30 \text{ days}$ $30 \text{ days} + 30 \text{ days} = \mathbf{60 \text{ days}}$
Finance Intelligence	None	$30 \text{ days} \times 33\% = 10 \text{ days}$ $30 \text{ days} + 10 \text{ days} = \mathbf{40 \text{ days}}$

Practice 6-2

Mini Case Study: Setting Up and Monitoring Targets

Part I As an implementation consultant for Vision Corporation, you have been assigned to set up performance measures for the corporation's Human Resources department. Based on the following data, BIS online Help, and the information provided in the lesson, set up the appropriate performance measures.

Login information for performance measure selection:

- User ID: xxPbluer
- Password: welcome

Part II To verify the results of your setup, login as Kim Orange (xxkorange) and add the performance measure that you set up in Part I to Kim's PHP.

Login information for performance measure setup on the PHP:

- User ID: xxkorange
- Password: welcome

Part I: Target-Level Setup

Scenario Definition After interviewing Kim Orange, you determine that a target level needs to be set up so that Kim can monitor the number of employees (headcount) that leave each calendar quarter for the HR organizations within the company.

Part I: Target-Level Setup (continued)

Kim would also like to set up targets for the fourth quarter of 1999 and the first quarter of 2000. For the fourth quarter of 1999, Kim wants to be notified if fewer than 5 people leave during the quarter and more than 12 people leave during the quarter (round to the nearest whole number). For the first quarter of 2000, Kim wants to be notified if more than 15 people leave (rounded to the nearest whole number).

Kim has specified that if 10 people leave during any given quarter, that is acceptable.

Recall from Practice 5-1 that Kim is assigned the following responsibilities:

- Human Resources Intelligence
- Financials Intelligence
- Operations Intelligence

Step 1 To set up a target level for a performance measure, you need to first verify that an appropriate seeded performance measure already exists (it does). Fill in the following blanks with the appropriate performance measure information.:

Performance Measure Definition
<ul style="list-style-type: none"> • Preseeded PM name: _____ • Display name: _____ • Internal name: _____ • Default Dimensions: _____ _____

Part I: Target-Level Setup (continued)

Step 2 Now that you have verified the performance measure, you must set up its associated target level. Use the following blanks to record your target level definition:

Target Level Definition
<ul style="list-style-type: none"> • Internal name: xxFTESEP • Display name: xx FTE Separations TL • Unit of Measure: _____ • Description: _____ _____ • Computing function: No Selection • Organization: _____ • Time: _____ • Selected responsibility: _____ (Hint: recall Kim's position) • Corrective action workflow information: <ul style="list-style-type: none"> – Item Type: _____ – Process: _____ – Role: _____

Hint: To set up the targets associated with this performance measure and target level, you must click the Save and View Targets button located at the bottom of the target-level definition window.

Part I: Target-Level Setup (continued)

Step 3 Now that you have defined the target level, you must create the associated targets. Use the following table to set up the appropriate targets.

Target Definition	Description
Target 1 (4-1999)	<ul style="list-style-type: none">• Time_____• Business plan: Industry Benchmark• Target _____• Below target % _____• Above target % _____
Target 1 (1-2000)	<ul style="list-style-type: none">• Time_____• Business plan: Industry Benchmark• Target _____• Below target % _____• Above target % _____

Part II: Performance Measure Setup on the PHP

After you set up the performance measure, notify Kim that she can now log into BIS and add the performance measure to the personal homepage.

Log into BIS as Kim (using the user ID and password provided in the introduction to this practice) and set up the appropriate performance measure.

Practice 6-2 Solutions

Part I: Target-Level Setup

- 1 Log into the BIS Personal Homepage using the following login information:
 Userid: xxPIbuer (where xx is your workstation number)
 Password: 123bluer
- 2 From the personal homepage Navigate region, select the Performance Management Framework (Full Access) link.
 The Performance Management Framework (Full Access) menu appears.
- 3 Select the Performance Measures link.
 The Performance Measures Selection form opens.
- 4 Select the HR Manpower Separations by Headcount performance measure and click the Edit button to review the performance measure.

Performance Measure

Internal Name: **HRMSPHEAD**

Display Name: **HR Manpower Separations By Headcount**

Description:

Dimensions

Available Dimensions:

- Product
- Sales Channel
- Activity Version
- Budget
- Customer
- Geography
- GL Company
- GL Secondary Measure
- Inventory Location
- Job

Selected Dimensions:

- Organization
- Time

Delete Save Save and View Target Levels Done Cancel

The Performance Measure form opens. Verify that the performance measure exists by reviewing the Performance Measure form for completeness. This performance measure includes the basic definition information and can be used for setting up target levels. *The required dimensions are Organization and Time.*

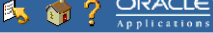
- 5 Click the Save and View Target Levels button.
 The Target Level Selection form opens.
- 6 Click the New button.
 The BIS Target Levels form opens.
- 7 Enter the following information:
 - Internal name: xxFTESEP
 - Display name: xx FTE Separations TL

Part I: Target-Level Setup (continued)

- Unit of measure: FTR
- Description: Target level for FTE separations by quarter
- Computing function: No Selection
- Dimension level for the Organization dimension: HR Organizations
- Dimension level for Time: Calendar Quarter
- Access: Human Resources Intelligence.

Note: You would not typically add the System Administration responsibility. Adding this responsibility for this class enables you to access this performance measure using both the User and System Administration responsibilities.

- Corrective Action Workflow: Item Type: HR BIS Corrective Action
- Process: HR Send Notification
- Role: Human Resources Intelligence

BIS_TARLEVL 

Performance Measure: **HR Manpower Separations By Headcount**

BIS_TARLEVL

Internal Name:

Display Name:

Unit of Measure:

Description:

Computing Function:

Dimension Levels

Organization:

Time:

Access

Available Responsibilities:

- Call Center Intelligence
- Candidate Offers
- Candidate Offers
- Career Portal
- Credit Cards
- Credit Cards (Card Profile Administrator)
- Credit Cards (Full Access)
- Credit Cards (Program Administrator)
- Customer Options
- EDI Transmissions (Full Access)

Selected Responsibilities:

- Syst
- Hurr

Corrective Action Workflow

Item Type:

Process:

Role:

Part I: Target-Level Setup (continued)

- 8** Click the Save button.

The Target Level Selection form appears and includes the target level that you just set up.

- 9** Select the your target level from the list.

- 10** Scroll to the bottom of the Target Level form and click the Save and View Targets button.

The Performance Target Level Selection form opens with your target level displayed in the Target Level field.

- 11** In the Organization field, select Total Organizations and then click the New Target button.

The Performance Target Details form opens and displays the performance measure and the associated target level for which you are about to set up a target and tolerance percentages.

- 12** Enter the appropriate information for the first target (4-1999) as indicated below:

- Time dimension value: 4 1999
- Business plan: accept the default (Industry Benchmark)
- Target: 10 (FTE)
- Below target: -50% ($10 + (-50\% \times 10) = 5$)
- Above target: 20% ($10 + (20\% \times 10) = 12$)
- Verify that the Notify responsibility is Human Resources Intelligence.

- 13** Click the Done button to save your work.

A successful save dialog message appears. After you click the OK button in this dialog window, the Performance Targets form appears and displays a summary of the information that you set up for the target.

- 14** To set up the second target, click the New button to reopen the Performance Target Details form.

- 15** Enter the appropriate information for the first target (1-2000) as indicated below:

- Time dimension value: 1 2000
- Business plan: accept the default (Industry Benchmark)
- Target: 10 (FTE)
- Below target: Do not enter a value
- Above target: 50% ($10 + (50\% \times 10) = 15$)
- Verify that the Notify responsibility is Human Resources Intelligence.

Part I: Target-Level Setup (continued)

Performance Target Details				ORACLE Applications	
Performance Measure: HR Manpower Separations By Headcount					
Target Level: 99 FTE Separations TL					
<div> <div>Dimensions</div> <div> Organization: Total Organizations Time: 4 1999 </div> </div>					
<div> <div>Target:</div> <div>Business Plan: Industry Benchmark</div> </div>					
Target:	10	FTE	Range 1:	-50	% - 20 %
					Human Resources Intelligence
			Range 2:		% - % Human Resources Intelligence
			Range 3:		% - % Human Resources Intelligence

16 Click the Done button to save your work.

The Performance Targets window opens and displays the two targets that you set up for the target level.

17 Click the Home icon to return to the PHP.

Part II : Setting Up and Monitoring Performance Measures on the PHP

- 1 Log into BIS as Kim Orange (user ID: xxkorange and password: 123orange).
- 2 In the Performance Measure region, select the Customize option.
The Performance Measures form opens.

The top screenshot shows the 'Performance Measures' form with the title 'Select Performance Measure(s) to track.' It features two lists: 'Available Performance Measures' and 'Selected Performance Measures'. The 'Available' list contains '00 FTE Separations', '99 FTE Separations TL', 'Headcount, HR Organization, HR Yearly', 'HR Manpower Separations By Headcount: organization, quarter', and 'HR Recruitment Success By Head: org, year'. The 'Selected' list contains '99 FTE Separations TL'. A blue arrow button is between the lists, and a 'Delete' button is below the 'Selected' list. 'Continue' and 'Cancel' buttons are at the bottom.

The bottom screenshot shows the 'Performance Measures' form with the title 'For each Performance Measure you have chosen, select the appropriate Dimension Level values, create a Display Label for the Performance Measure, and then add it to the favorites list.' It features a 'Performance Measure' dropdown set to '99 FTE Separations TL'. Below it are 'Dimensions and Business Plan' fields: 'Total Organizations' (dropdown set to 'total_organizations') and 'Business Plan' (dropdown set to 'Industry Benchmark'). A 'Display Label' field contains '99 FTE Separations TL'. A 'Display on Homepage' button is below the label field. On the right, a 'Performance Measures on Homepage' list contains '99 FTE Separations TL'. 'Edit' and 'Delete' buttons are at the bottom.

- 3 From the list of available performance measures, select the xx FTE Separations TL and click the add arrow to add the performance measure to the Selected Performance Measures region.
- 4 Click the Continue button.
The Performance Measure form opens and enables you to specify dimension levels and a display label.
- 5 In the Display Label field, enter xx FTE Separations TL and click the Display on the Homepage button.
The display name that you entered appears in the Performance Measures on Homepage region.

**Part II : Setting Up and Monitoring Performance Measures on the PHP
(continued)**

- 6** Click the OK button to save your work and return to the personal homepage.
The target level appears in the Performance Measure region on the personal homepage.
- 7** Log out of BIS and wait for the instructor to run the associated BIS alert.
- 8** After the alert is run, log back into BIS as Kim Orange and view the actual value for the performance measure.

Practice 7-1

Describing Intelligence Reports and Security

Circle or write the best answer for each of the following questions.

- 1 You access BIS reports by selecting the Performance Management Framework (Full Access) responsibility.
 - a True
 - b False
- 2 Briefly describe how you distinguish a report from an analysis workbook.

- 3 These are variables that you enter for a selected report:
 - a Report header information
 - b Related reports
 - c Parameters
 - d Related links
- 4 The concept that relates to entering parameters only one time is called?
 - a Related links
 - b Related information
 - c Custom units of measure
 - d Parameter passing
- 5 All reports have an equal number of parameters, so you need to enter them only one time.
 - a True
 - b False
- 6 To return to the parameters page of a report, click the _____ icon.
- 7 Parameters are valid only during the current session.
 - a True
 - b False
- 8 A BIS, release 11*i*, report can include more than one graph or chart.
 - a True
 - b False
- 9 The Related Reports link enables you to view both reports and analysis workbooks, as well as performance measures related to a report.

Describing Intelligence Reports and Security (continued)

- a** True
 - b** False
- 10** Extensible links enable you to add reports, analysis workbooks, and even URLs to an existing report's Related Information section.
 - a** True
 - b** False
- 11** Reports Online Help does not typically include the formulas for business metrics. To find the formulas, you must check the hard-copy formulas guide.
 - a** True
 - b** False
- 12** Union security enables you to view reports and other BIS information related to the set of all responsibilities to which you have access.
 - a** True
 - b** False

Practice 7-1 Solutions

Describing Intelligence Reports and Security

Circle or write the best answer for each of the following questions.

- 1 You access BIS reports by selecting the Performance Management Framework (Full Access) responsibility.
 - a True
 - b **False. You access reports from the intelligence area menu that you select. For example, selecting Financials Intelligence from the Navigate region opens a list of related reports and workbook links.**
- 2 Briefly describe how you distinguish a report from an analysis workbook
With the exception of the Manpower Analysis link, workbooks contain the word *analysis*, whereas reports do not.
- 3 These are variables that you enter for a selected report:
 - a Report header information
 - b Related reports
 - c **Parameters**
 - d Related links
- 4 The concept that relates to entering parameters only one time is called?
 - a Related links
 - b Related information
 - c Custom units of measure
 - d **Parameter passing**
- 5 All reports have an equal number of parameters, so you need to enter them only one time.
 - a True
 - b **False. Report parameters vary depending on the report that you select. However, related reports typically include the same parameters as the main report.**
- 6 To return to the parameters page of a report, click the **Parampage** icon.
- 7 Parameters are valid only during the current session.
 - a **True**
 - b False
- 8 A BIS, release 11*i*, report can include more than one graph or chart.
 - a True
 - b **False. For release 11*i*, a report can include only one graph.**

Describing Intelligence Reports and Security

- 9** The Related Reports link enables you to view both reports and analysis workbooks as well as performance measures related to a report.
- a** True
 - b** **False. The Related Reports link does not enable you to view performance measures. You view performance measures in the Performance Measure region of the PHP.**
- 10** Extensible links enable you to add reports, analysis workbooks, and even URLs to an existing report's Related Information section.
- a** **True**
 - b** False
- 11** Reports online Help does not typically include the formulas for business metrics. To find the formulas, you must check the hard-copy formulas guide.
- a** True
 - b** **False. Online Help typically does include the formula for a given business metric.**
- 12** Union security enables you to view reports and other BIS information related to the set of all responsibilities to which you have access.
- a** **True**
 - b** False

Practice 7-2

Using Intelligence Reports

In this practice, you log into BIS using xxjwright and answer the following questions about reports. **Note:** For this practice, you will access reports under the Financials, Human Resources, and Operations navigate links.

- 1 Under which Navigate responsibility would James find the Contribution Margin report?_____
- 2 Under which Navigate responsibility would James find the Production Efficiency report?_____
- 3 Under which Navigate responsibility would James find the Workforce Trends report?_____
- 4 Under which Navigate responsibility would James find the Manpower Analysis workbook?_____
- 5 Without accessing the report, what is the description of the profitability report, Analysts Summary?_____
- 6 Access the Revenues report for January 2000, what is the value of revenues for period to date?_____
- 7 Scroll to the bottom of the Revenues report. What are the related reports?

Practice 7-2 Solutions

Using Intelligence Reports

In this practice, you log into BIS using xxjwright and answer the following questions about reports. **Note:** For this practice, you will access reports under the Financials, Human Resources, and Operations navigate links.

- 1 Under which Navigate responsibility would James find the Contribution Margin report? **Financials Intelligence** Under which Navigate responsibility would James find the Production Efficiency Report? **Operations Intelligence**
- 2 Under which Navigate responsibility would James find the Workforce Trends report? **Human Resources Intelligence**
- 3 Under which Navigate responsibility would James find the Manpower Analysis workbook? **Financials Intelligence**
- 4 Without accessing the report, what is the description of the profitability report, Analysts Summary? **Key measures that analysts use to evaluate business performance. When you run the mouse cursor over a report or workbook link, a description appears in the status bar of the window.**
- 5 Access the Revenues report for the target date of JAN 2000. What is the value of revenues for period to date? **94**
- 6 Scroll to the bottom of the Revenues report. What are the related reports?

GL Analysis Workbook

Contribution Margin

Expenses

Profit Margin

Practice 8-1

Describing Business Views

Circle or write the best answer for each of the following questions.

- 1** Write the corresponding physical model term for each of the following logical data model terms:

- a** _____ Unique Identifier
- b** _____ Entity
- c** _____ Attribute
- d** _____ Relationship

- 2** Briefly describe the relationship between business areas in Discoverer and business views in the data dictionary.

- 3** Briefly describe the difference between a base view and a full view.

- 4** Business areas reside in the Discoverer End User Layer.

- a** True
- b** False

- 5** Business view security is based *only* on security profiles.

- a** True
- b** False

- 6** When you perform a business views search on the PHP, it returns a list of hyperlinked views that you can automatically access just by clicking the appropriate link.

- a** True
- b** False

- 7** The purpose of the business views generator is to create a view.

- a** True
- b** False

- 8** The business view generation process is performed through the concurrent manager.

- a** True
- b** False

Practice 8-1 Solutions

Describing Business Views

Circle or write the best answer for each of the following questions.

- 1 Write the corresponding physical model term for each of the following logical data model terms:
 - a **Primary key constraint** Unique Identifier
 - b **Table** Entity
 - c **Column** Attribute
 - d **Foreign key constraint** Relationship
- 2 Briefly describe the relationship between business areas in Discoverer and business views in the data dictionary.

Business areas, which represent product groups, are part of the Discoverer End User Layer, and they retrieve their data from the fully generated business views.
- 3 Briefly describe the difference between a base view and a full view.

A base view contains the foreign key from the associated entity. A full view includes nonkey columns from the base views. A fully generated view also resolves the flexfield and lookup tags.
- 4 Business areas reside in the Discoverer End User Layer.
 - a **True**
 - b False
- 5 Business view security is based *only* on security profiles.
 - a True
 - b **False. Business view security is based on security profiles and organizational hierarchies.**
- 6 When you perform a business views search on the PHP, it returns a list of hyperlinked views that you can automatically access just by clicking the appropriate link.
 - a True
 - b **False. When you perform a business views search, BIS does return a list of views, but they are not hyperlinked. You must manually access Discoverer to view the results of the search.**
- 7 The purpose of the business views generator is to create a view.
 - a **True**
 - b False
- 8 The business view generation process is performed through the concurrent manager.
 - a **True**
 - b False

Practice 8-2

Accessing Business Views

In this practice, you access and view a series of BIS-related business views.

- 1 Open a session of SQL*Plus.
- 2 Enter the following connect string information (or the connect string information provided by the instructor):
 - Username: apps
 - Password: apps
 - Host string: CD

Oracle SQL*Plus opens.

- 3 To access the full view for human resources organizations, type the following command at the SQL> prompt and then press return:

```
DESCRIBE hrfv_hr_organizations;
```

The following view is displayed:

```
SQL> describe hrfv_hr_organizations;
Name                                Null?    Type
-----
BUSINESS_GROUP_NAME                 NOT NULL VARCHAR2(60)
ORGANIZATION_NAME                    NOT NULL VARCHAR2(60)
DATE_FROM                           NOT NULL DATE
DATE_TO                              DATE
INTERNAL_ADDRESS                     VARCHAR2(80)
COMMENTS                             LONG
DEFAULT_START_TIME                   VARCHAR2(150)
DEFAULT_END_TIME                     VARCHAR2(150)
WORKING_HOURS_AMOUNT                 NUMBER
WORKING_HOURS_FREQUENCY              VARCHAR2(150)
INTERNAL_EXTERNAL_FLAG                VARCHAR2(4000)
ORGANIZATION_TYPE                    VARCHAR2(4000)
LOCATION_NAME                          VARCHAR2(20)
_DF                                  CHAR(32)
BUSINESS_GROUP_ID                    NOT NULL NUMBER(15)
COST_ALLOCATION_KEYFLEX_ID             NUMBER(9)
LOCATION_ID                            NUMBER(15)
ORGANIZATION_ID                      NOT NULL NUMBER(15)
SOFT_CODING_KEYFLEX_ID                NUMBER(15)
```

Accessing Business Views (continued)

- 4 At the SQL> prompt, enter the following statement to select the fully generated view:

```
DESCRIBE hrfg_hr_organizations;
```

The statement returns the following fully generated view:

```
SQL> desc hrfg_hr_organizations;
Name                               Null?    Type
-----
BUSINESS_GROUP_NAME                NOT NULL VARCHAR2(60)
ORGANIZATION_NAME                  NOT NULL VARCHAR2(60)
DATE_FROM                          NOT NULL DATE
DATE_TO                            DATE
INTERNAL_ADDRESS                   VARCHAR2(80)
COMMENTS                           LONG
DEFAULT_START_TIME                 VARCHAR2(150)
DEFAULT_END_TIME                   VARCHAR2(150)
WORKING_HOURS_AMOUNT               NUMBER
WORKING_HOURS_FREQUENCY            VARCHAR2(150)
INTERNAL_EXTERNAL_FLAG              VARCHAR2(4000)
ORGANIZATION_TYPE                  VARCHAR2(4000)
LOCATION_NAME                       VARCHAR2(20)
BUSINESS_GROUP_ID                  NOT NULL NUMBER(15)
COST_ALLOCATION_KEYFLEX_ID          NUMBER(9)
LOCATION_ID                          NUMBER(15)
ORGANIZATION_ID                    NOT NULL NUMBER(15)
SOFT_CODING_KEYFLEX_ID             NUMBER(15)

SQL> |
```

- 5 Discuss the differences between the fully generated view and the full view:

- 6 When you are finished, exit SQL*Plus.

Practice 8-2 Solutions

Accessing Business Views

- 5 Discuss the differences between the fully generated view and the full view.

The full view includes the Oracle-assigned tag names for flexfield columns.

The fully generated view replaces the tag names with the name of the flexfield definition. You can see this change in the descriptive flexfield column:

LOCATION_NAME_DF. In the full view, this column is tagged with DF (descriptive flexfield). In the fully generated view, the column omits the DF tag and is called LOCATION_NAME.

Guided Practice 8-3

Using the Business Views Generator

Note: Depending on system resources, the instructor might demonstrate this process. To generate business views, you must access the Business Views Setup responsibility in Oracle Applications.

Running the View Generator

- 1 Log into Oracle Applications using the Business View Setup responsibility.
Username: pbluer
Password: 123bluer
- 2 Select Reports—>Run from the Navigator.
- 3 When the Submit a New Request window opens, select Single Request, and click the OK button.
The Submit Request window appears.
- 4 In the Name field, select Generate Business Views By Application from the list of values.
A Parameters window appears.
- 5 Select Oracle General Ledger or Oracle Human Resources from the list of values in the Parameters window and click the OK button.

The Submit Request window appears with the selected parameter.

- 6 Click the Submit button to submit your request.

Using the Business Views Generator (continued)

- 7 When the Decision dialog box appears, write down the request ID _____ and then click the No button.

The view generator for Financials Intelligence has been submitted.

- 8 Close the Submit Request window and return to the Business Views Setup Navigator.

Viewing the Results of a Business View Generation Request

- 1 From the Business Views Setup Navigator, select Reports—>View.
The Find Requests window opens.
- 2 Select the Specific Requests option.
- 3 In the Request ID field, enter the request ID that you wrote down in step 7 above, and click the Find button.

The Requests window opens.

Request ID	Name	Parent	Phase	Status	Parameters
442813	Generate Business Views		Completed	Normal	, Fill, , , , ,

Using the Business Views Generator (continued)

- 4 Click the View Output and View Log buttons to see the results of the view generation.

Partial output results are noted below:

BIS_VG_GENERATOR_NAME		07-JUN-2000 04:10
BIS_VG_INPUT_PARAMETERS		

BIS_VG_INPUT_APP PER		
BIS_VG_ALL_VIEWS_SUCCESSFUL		
BIS_VG_SOURCE_VIEW_HEADING	BIS_VG_GENERATED_VIEW_HEADING	

HRFV_ORGANIZATION_DESCENDENTS	HRBG_ORGANIZATION_DESCENDENTS	
HRFV_POSITION_DESCENDENTS	HRBG_POSITION_DESCENDENTS	
HRFV_ABSENCES	HRFG_ABSENCES	
HRFV_ACCRUAL_PLAN_ENROLLMENTS	HRFG_ACCRUAL_PLAN_ENROLLMENTS	
HRFV_ACCRUAL_VALUES	HRFG_ACCRUAL_VALUES	
HRFV_ADA_DISABILITIES	HRFG_ADA_DISABILITIES	
HRFV_ADA_DIS_ACCOMMODATIONS	HRFG_ADA_DIS_ACCOMMODATIONS	
HRFV_ADDRESSES	HRFG_ADDRESSES	
HRFV_ASSIGNMENT_COSTS	HRFG_ASSIGNMENT_COSTS	
HRFV_BENEFIT_ENROLLMENTS	HRFG_BENEFIT_ENROLLMENTS	
HRFV_BUSINESS_GROUPS	HRFG_BUSINESS_GROUPS	
HRFV_COMPETENCE_PROFILES	HRFG_COMPETENCE_PROFILES	
HRFV_CONTACTS	HRFG_CONTACTS	
HRFV_CURRENT_SALARIES	HRFG_CURRENT_SALARIES	
HRFV_DEF_BENEFIT_CONTRIBUTIONS	HRFG_DEF_BENEFIT_CONTRIBUTIONS	

Note: The actions in this step do not show you the columns of the actual views created, but the output and log results do show you the names of the views that were successfully created. To see the view columns created by your request, you must access SQL plus and query the view. For a list of specific views for each application, consult the *Oracle Applications Business Objects Technical Reference Manual*.

Practice 9-1

Describing Analysis Workbooks

Circle or write the best answer for each of the following questions.

- 1 Label the following examples with the appropriate Discoverer terms.

Examples:

- _____ Products folder maps only to the PRODUCTS table or view
- _____ Character, number, date, and so on
- _____ Employee name, department, product, price, and so on
- _____ One-to-one, one-to-many
- _____ Sales_Facts folder maps to the SALES and ITEMS tables or views

Discoverer terms:

- a Item
 - b Data type
 - c Complex folder
 - d Simple folder
 - e Join
- 2 The database and data dictionary provide the source for the Discoverer EUL.
- a True
 - b False
- 3 The Discoverer administrator typically sets up the folders and joins in the EUL.
- a True
 - b False
- 4 BIS automatically opens Discoverer when you click on a workbook link in the PHP.
- a True
 - b False
- 5 Which of the following is *not* one of the Discoverer workbook types?
- a Table
 - b Crosstab
 - c Page-detail table
 - d End User Layer table

Describing Analysis Workbooks (continued)

- 6 Which of the following workbook types does *not* include dimensions?
 - a Table
 - b Crosstab
 - c Page-detail table
 - d Page-detail cross tab
- 7 Workbook security uses both Oracle Applications security, as well as Discoverer security.
 - a True
 - b False
- 8 Worksheets are pages in a workbook.
 - a True
 - b False
- 9 You can customize worksheets by accessing the appropriate tab in the Edit worksheet window.
 - a True
 - b False

Practice 9-1 Solutions

Describing Analysis Workbooks

Circle or write the best answer for each of the following questions.

1 Label the following examples with the appropriate Discoverer terms.

Examples:

- d** Products folder maps only to the PRODUCTS table or view
- b** Character, number, date, and so on
- a** Employee name, department, product, price, and so on
- e** One-to-one, one-to-many
- c** Sales_Facts folder maps to the SALES and ITEMS tables or views

Discoverer terms:

- a** Item
 - b** Data type
 - c** Complex folder
 - d** Simple folder
 - e** Join
- 2** The database and data dictionary provide the source for the Discoverer EUL.
- a True**
 - b False**
- 3** The Discoverer administrator typically sets up the folders and joins in the EUL.
- a True. However, BIS comes preseeded with the EUL already created.**
 - b False**
- 4** BIS automatically opens Discoverer when you click on a workbook link in the PHP.
- a True**
 - b False**
- 5** Which of the following is *not* one of the Discoverer workbook types?
- a Table**
 - b Crosstab**
 - c Page-detail table**
 - d End User Layer table. The fourth workbook type is Page-detail crosstab.**

Describing Analysis Workbooks

- 6 Which of the following workbook types does *not* include dimensions?
 - a **Table**
 - b Crosstab
 - c Page-detail table
 - d Page-detail crosstab
- 7 Workbook security uses both Oracle Applications security, as well as Discoverer security.
 - a **True. The Oracle Applications security is the responsibility; the workbook security refers to sharing the workbooks in the User Edition.**
 - b False
- 8 Worksheets are pages in a workbook.
 - a **True**
 - b False
- 9 You can customize worksheets by accessing the appropriate tab in the Edit worksheet window.
 - a **True**
 - b False

Practice 9-2

Accessing and Viewing Analysis Workbooks

In this practice, you log into the system as a BIS user and access a variety of analysis workbooks.

Note: Your instructor might provide you with different login information than what has been provided for each scenario.

Scenario I You are an operations manager at Vision Corporation. You have been assigned both the Operations and Financials Intelligence responsibilities. You need to perform some cash flow analysis through December 1999 on several of your regional operations, including the United States and Europe.

Using the login information provided, from the BIS personal homepage access the Cash Flow Analysis workbook and answer the following questions:

Login information:

- Username: operations
- Password: welcome

- 1 What is the cash amount for the United States Invest deal type?

- 2 What is the cash amount for the European Invest deal type? _____
- 3 What is the deal number associated with associated with the European account? _____
- 4 What is the deal number associated with the United States account? _____
- 5 What is the system (.dis) name of the analysis workbook?

- 6 After you finish, select File—>Close to close this workbook, but do not exit out of Discoverer.

Scenario II You now want to perform some revenue analysis for the United States operations.

- 1 From the Discoverer menu, select File—>Open and then select a workbook to open from the database.
A list of workbooks stored on the database appear.
- 2 Select the workbook BISUSER.FIIGLREV.dis from the list of workbooks, and then click the Open button.
- 3 What was Vision Operations' actual contribution margin for 1999? _____
- 4 What was the company's actual current ratio for September of 1998? _____
- 5 What were the company's actual revenues from operations in 1998? _____

Accessing and Viewing Analysis Workbooks (continued)

Scenario III You are now performing as a BIS administrator and need to answer the following questions.

- 1 What is the name of the End User Layer to which you are currently connected? _____ (**Hint:** check the Help or Options menu.)
- 2 Your users have requested that the revenues analysis workbook be exported to an Excel spreadsheet. Briefly describe (but do not perform) the steps required to perform the export. _____

- 3 Your users have requested that they want to prevent queries from running longer than 20 minutes. Where would you set up this request? _____
- 4 What is the current time limit at which queries will be prevented from running? _____

Scenario IV You now want to view the underlying business areas associated with the Human Resources. To do this you must first log into the Discoverer 3.1 Administration Edition, using the following login information:

- Username: biseul
- Password: welcome

Note: Your instructor will provide instructions on how to access the Discoverer software, including the appropriate connect string.

After logging into the Administration Edition, answer the following questions.

- 1 Select the Human Resources business area and then click the Open button.
- 2 Click the Expand icon next to Human Resources to view the folders for this business area.
- 3 Expand the Hires folder.
- 4 List three of the senior job names that appear in this folder:

- 5 Select the Item Classes tab and then expand the item class for Employment Categories.

Accessing and Viewing Analysis Workbooks (continued)

6 What are the full-time employment categories?

7 What are a few of the items that use this item class?

8 To enable users to drill down into certain information, the Discoverer administrator must create hierarchies. For the birth date hierarchy, what are the drill levels?

Practice 9-2 Solutions

Accessing and Viewing Analysis Workbooks

In this practice, you log into the system as a BIS user and access a variety of analysis workbooks.

Scenario I You are an operations manager at Vision Corporation. You have been assigned both the Operations and Financials Intelligence responsibilities. You need to perform some cash flow analysis through December 1999 on several of your regional operations, including the United States and Europe.

Using the login information provided, from the BIS personal homepage access the Cash Flow Analysis workbook and answer the following questions:

Login information:

- Username: operations
- Password: welcome

- 1** What is the cash amount for the United States Invest deal type? **\$25,000. To retrieve this solution, in the Cash Flow Summary worksheet, select the Page Item Curr: USD. The deal type amounts should appear.**
- 2** What is the cash amount for the European Invest deal type? **\$55,000. To retrieve this solution, in the Cash Flow Summary worksheet, select the Page Item Curr: EUR. The deal type amount for Europe should appear.**
- 3** What is the deal number associated with associated with the European account? **30. To retrieve this solution, select the Cash Flow Detail worksheet for the Vision Corporation. When the worksheet opens, select the Page Item Curr, and then select EUR. The deal number is listed in the first column of this worksheet.**
- 4** What is the deal number associated with the United States account? **27. To retrieve this solution, select the Cash Flow Detail worksheet for the Vision Corporation. When the worksheet opens, select the Page Item Curr, and then select USD. The deal number is listed in the first column of this worksheet.**
- 5** What is the system (.dis) name of the analysis workbook? **FIIXTRCF.dis. The workbook name is displayed in the window title bar.**
- 6** After you finish, select File—>Close from the menu to close this workbook, but do not exit Discoverer.

Note: Do not save your changes.

Accessing and Viewing Analysis Workbooks (continued)

Scenario II You now want to perform some revenue analysis for the United States operations.

- 1** From the Discoverer menu, select File—>Open and then select a workbook to open from the database.
A list of workbooks stored on the database appear.
- 2** Select the workbook BISUSER.FIIGLREV.dis from the list of workbooks, and then click the Open button.
- 3** What was Vision Operations' actual contribution margin for 1999? **70.96%.** To retrieve this solution, select the **Contribution Margin worksheet**. The contribution margin is listed in the first column in the 1999 section of the worksheet.
- 4** What was the company's actual current ratio for September of 1998? **1.78.** To retrieve this solution, select the **Current Ratio Analysis worksheet** and then scroll down to the current ratio for September 1998.
- 5** What were the company's actual revenues from operations in 1998? **\$638,604,987.** To retrieve this information, select the **Revenue Analysis worksheet**. The actual revenues for each year are listed in the first column.

Accessing and Viewing Analysis Workbooks (continued)

Scenario III You are now performing as a BIS administrator and need to answer the following questions.

- 1 What is the name of the End User Layer to which you are currently connected?
EULBIS_US (Hint: check the Help or Options menu.)
- 2 Your users have requested that the revenues analysis workbook be exported to an Excel spreadsheet. Briefly describe (but do not perform) the steps required to perform the export. **From the File menu, you select Export and then select the export to Excel option.**
- 3 Your users have requested that they want to prevent queries from running longer than 20 minutes. Where would you set up this request? **You select Options from the Tools menu, and then select the Query Governor tab.**
- 4 What is the current time limit at which queries will be prevented from running? **30 minutes.**

Scenario IV You now want to view the underlying business areas associated with Human Resources. To do this you must first log into the Discoverer 3.1 Administration Edition, using the following login information:

- Username: biseul
- Password: welcome

Note: Your instructor will provide instructions on how to access the Discoverer software, including the appropriate connect string.

After logging into the Administration Edition, answer the following questions.

- 1 Select the Human Resources business area and then click the Open button.
- 2 Click the Expand icon next to Human Resources to view the folders for this business area.
- 3 Expand the Hires folder.
- 4 List three of the senior job names that appear in this folder:
Senior Administrator
Senior Consultant
Senior Fitter
To access these job names, expand the Hires folder. Next, expand the Job Name item. Scroll toward the bottom of the list to locate the senior positions.
- 5 Select the Item Classes tab and then expand the item class for Employment Categories.

Accessing and Viewing Analysis Workbooks (continued)

- 6** What are the full-time employment categories?

Fulltime-Regular

Fulltime-Temporary

To find employment categories, expand the Employment Categories Item Class.

- 7** What are a few of the items that use this item class?

Hires.Employment Category

Employment Categories. Meaning

Transfers In.Employment Category

To find items that use this item class, expand the Employment Categories item class, and then expand the “Items using this item (with drill to detail)” icon.

- 8** To enable users to drill down into certain information, the Discoverer administrator must create hierarchies. For the birth date hierarchy, what are the drill levels?

Date of Birth Year

Date of Birth Quarter

Date of Birth Month

Date of Birth Day

Date of Birth

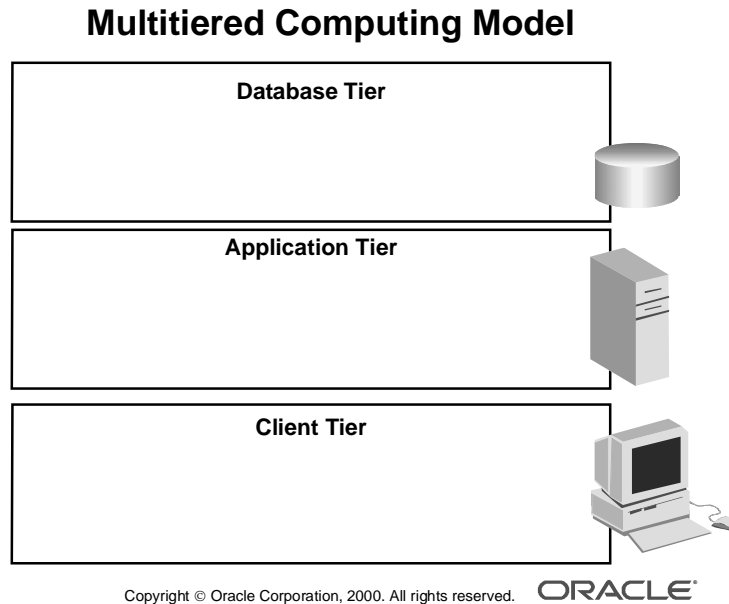
To access this hierarchy, select the Hierarchies tab, and then expand the Date of Birth Default Date Hierarchy.

Practice 13-1

Describing the BIS Architecture

Circle or write the best answer for the following statements and questions.

- 1 In the boxes provided, briefly describe the components and purpose of each tier in the three-tiered computing model.



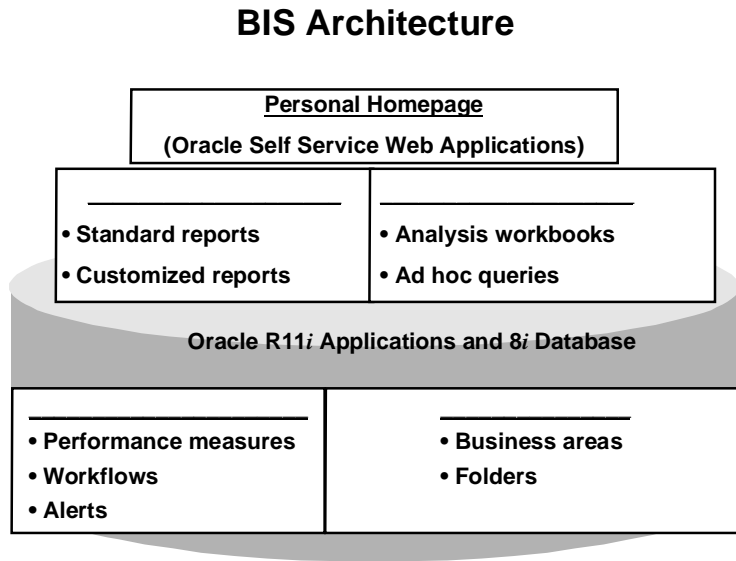
- 2 Which of the following is *not* a server on the application tier?
 - a Web application server
 - b Application server
 - c Reports server
 - d Database server
- 3 The application tier provides load balancing and business logic.
 - a True
 - b False

Describing BIS Architecture (continued)

- 4** Which of the following represents the function of cartridges?
 - a** Cartridges accept incoming HTTP requests.
 - b** Cartridges act as Web request brokers.
 - c** Cartridges extend the capabilities of the Oracle server.
 - d** Cartridges transfer the HTTP request to the Web broker.
- 5** BIS does not use the Oracle Forms interface.
 - a** True
 - b** False
- 6** Self Service Web Applications use a pure HTML and JavaScript interface or what you typically see as a standard Web page.
 - a** True
 - b** False
- 7** After a reports request is processed, the reports server passes the report data back to the Web browser.
 - a** True
 - b** False
- 8** End users typically create their own Discoverer End User Layer.
 - a** True
 - b** False
- 9** The database tier includes the concurrent processing server, the Oracle8i server, and the reports server.
 - a** True
 - b** False
- 10** The administration server is the machine from which the database administrator maintains the Oracle Applications database.
 - a** True
 - b** False
- 11** Concurrent processes run in the foreground, so it is a good idea to have users log off the application on which the concurrent process is being run.
 - a** True
 - b** False

Describing BIS Architecture (continued)

- 12 Label the following diagram with the appropriate BIS architecture components. The first component, the personal homepage, has been entered for you.



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- 13 Briefly describe (in three or fewer sentences each) the purpose of each of the following servers:

Application server

Database server

Web applications server

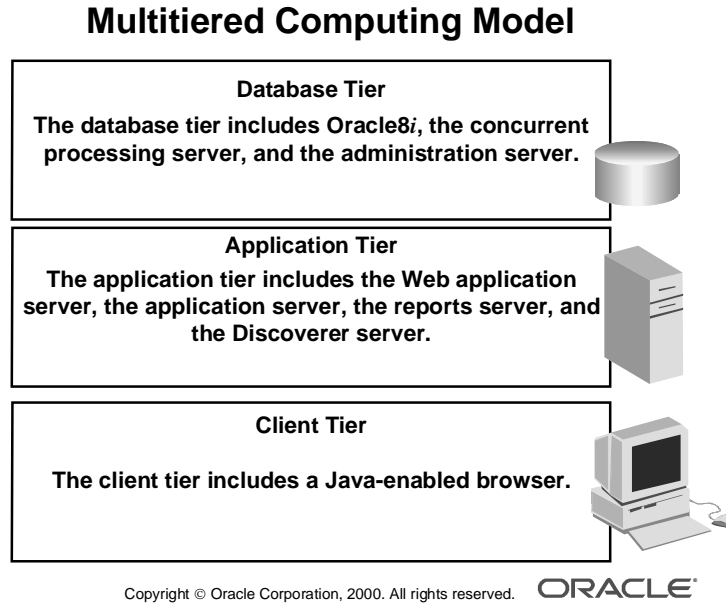
Discoverer server

Practice 13-1 Solutions

Describing BIS Architecture

Circle or write the best answer for the following statements and questions.

- 1 In the boxes provided, briefly describe the components and purpose of each tier in the three-tiered computing model.



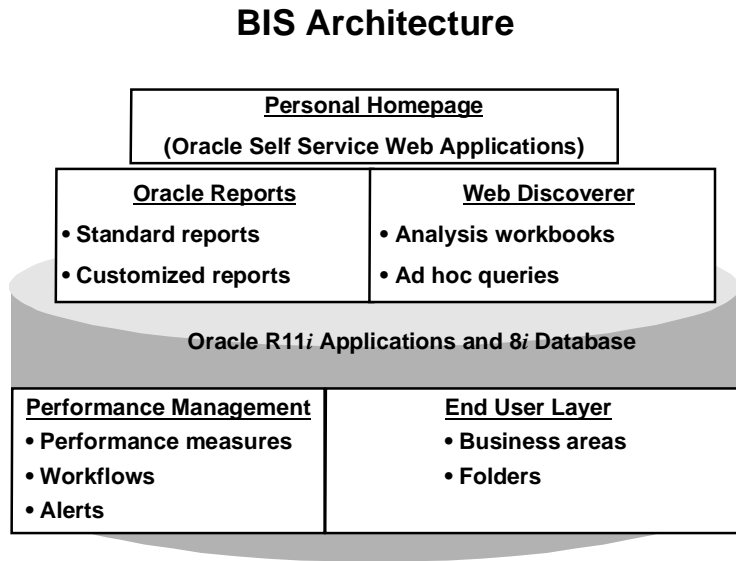
- 2 Which of the following is *not* a server on the application tier?
 - a Web application server
 - b Application server
 - c Reports server
 - d **Database server. This is a component of the database tier.**
- 3 The application tier provides load balancing and business logic.
 - a **True**
 - b False

Describing BIS Architecture (continued)

- 4 Which of the following represents the function of cartridges?
 - a Cartridges accept incoming HTTP requests. (**represents the listener**)
 - b Cartridges act as Web request brokers. (**serve as Web applications communicators**)
 - c **Cartridges extend the capabilities of the Oracle Server**
 - d Cartridges transfer the HTTP request to the Web broker. (**this is the Web broker**)
- 5 BIS does not use the Oracle Forms interface.
 - a **True. BIS uses a Web-based or Oracle Self Service Web Applications interface.**
 - b False
- 6 Self Service Web Applications use a pure HTML and JavaScript interface, or what you typically see as a standard Web page.
 - a **True**
 - b False
- 7 After a reports request is processed, the reports server passes the report data back to the Web browser.
 - a **True**
 - b False
- 8 End users typically create their own Discoverer End User Layer.
 - a True
 - b **False. The Discoverer administrator typically creates the EUL, business areas, folders, item names, and descriptions.**
- 9 The database tier includes the concurrent processing server, the Oracle8i server, and the reports server.
 - a True
 - b **False. The reports server is on the applications tier.**
- 10 The administration server is the machine from which the database administrator maintains the Oracle Applications database.
 - a **True**
 - b False
- 11 Concurrent processes run in the foreground, so it is a good idea to have users log off the application on which the concurrent process is being run.
 - a True
 - b **False. Concurrent process run in the background. Users do not need to log off the system while concurrent processes run.**

Describing BIS Architecture (continued)

- 12 Label the following diagram with the appropriate BIS architecture components. The first component, the personal homepage, has been entered for you.



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- 13 Briefly describe (in three or fewer sentences each) the purpose of each of the following servers:

Application server

The application server includes the forms associated with the application. This server mediates the communication between the desktop client and the database. The application server also caches data retrieved from the database and provides it to the client as necessary. The bulk of the business logic resides on this server.

Database server

The database tier contains all of the data and database objects. This tier also processes all SQL requests for data. Release 11i applications require the Oracle8i database.

Web applications server

The Web applications server processes the requests it receives from the network. This server includes the HTTP listener and the Web request broker. The browser connects to the Web applications server.

Describing BIS Architecture (continued)

Discoverer server

This server communicates directly with the database to retrieve information from the EUL schema, which resides on the database server.

Practice 14-1

Describing Oracle Alerts

Circle or write the best answer for each of the following statements.

- 1 Using Oracle Alert is useful in situations where you want to monitor, or make updates or changes to database tables.
 - a True
 - b False
- 2 An event alert occurs at the times that you specify. For example, you might specify that an event alert that sums monthly sales figures be run on the last day of the month.
 - a True
 - b False
- 3 A Periodic alert occurs at times that you specify. For example, you might specify that a general ledger alert that sums monthly expenses be run on the fifteenth day of each month.
 - a True
 - b False
- 4 Number the following alert components 1 through 4 to depict the order in which you set them up.
 - a _____ Alert action sets
 - b _____ Alert details
 - c _____ Alert definition
 - d _____ Alert actions
- 5 You create the SQL SELECT statement in the action details component.
 - a True
 - b False
- 6 You use the Outputs region to define the length of each of your output variables.
 - a True
 - b False
- 7 Briefly describe the difference between alert details and alert action details.

- 8 The following table best describes which of the following alert components?

Describing Oracle Alerts (continued)

Sequence	Action Type
001	SQL script
002	SQL script
003	Message

- a** Alert details
- b** Action sets
- c** Response sets
- d** Action details

9 Is the following statement part of a SQL SELECT statement or is it part of a SQL script action detail?

```
Begin  
hr_bis_alerts.process_sample(&variable)  
End;
```

- a** SQL SELECT statement
- b** SQL Script

Practice 14-1 Solutions

Describing Oracle Alerts

Circle or write the best answer for each of the following statements.

- 1 Using Oracle Alert is useful in situations where you want to monitor updates or changes to database tables.
 - a True
 - b False
- 2 An event alert occurs at the times that you specify. For example, you might specify that an event alert that sums monthly sales figures be run on the last day of the month.
 - a True
 - b **False. This statement describes a periodic alert. An event alert occurs as soon as an update is made to the database. You typically set up event alerts so that you can timely track important or unusual events as they happen.**
- 3 A periodic alert occurs at times that you specify. For example, you might specify that a general ledger alert that sums monthly expenses be run on the fifteenth day of each month.
 - a True
 - b False
- 4 Number the following alert components 1 through 4 to depict the order in which you set them up.
 - a **4** Alert action sets
 - b **2** Alert details
 - c **1** Alert definition
 - d **3** Alert actions
- 5 You create the SQL SELECT statement in the action details component.
 - a True
 - b **False. You create the SQL SELECT statement during the alert definition step (step 1).**
- 6 You use the Outputs region to define the length of each of your output variables.
 - a True
 - b False
- 7 Briefly describe the difference between alert details and alert action details.

Describing Oracle Alerts (continued)

When setting up alert details, you specify the outputs, inputs (if any), and installations related to the alert. When setting up action details, you specify the action or actions to be performed in response to the alert. Action details include the following action types:

- Concurrent program
- Message
- Operating system script
- SQL statement script

8 The following table best describes which of the following alert components?

Sequence	Action Type
001	SQL script
002	SQL script
003	Message

- a** Alert details
- b** Action sets
- c** Response sets
- d** Action details

9 Is the following statement part of a SQL SELECT statement or is it part of a SQL script action detail?

```
Begin  
hr_bis_alerts.process_sample(&variable)  
End;
```

- a** SQL SELECT statement
- b** SQL script

Practice 15-1

Describing Oracle Workflows

Circle or write the best answer for each of the following statements.

- 1 With Oracle Workflow, you can route information and define business rules and processes.
 - a True
 - b False
- 2 A workflow process is a document or transaction.
 - a True
 - b False
- 3 A workflow item is a document or transaction.
 - a True
 - b False
- 4 A workflow function activity requires human intervention before it can finish processing.
 - a True
 - b False
- 5 A workflow activity is a unit of work that is performed in a process.
 - a True
 - b False
- 6 A workflow transition is the relationship that defines the completion of one activity and the activation of another activity.
 - a True
 - b False
- 7 You use the Workflow Navigator to build the actual process diagram.
 - a True
 - b False
- 8 A workflow item type includes components such as attributes, messages, and lookup types.
 - a True
 - b False

Describing Oracle Workflows (continued)

9 Write the number of the definition with its related workflow component

Workflow components:

- a** _____ attributes
- b** _____ processes
- c** _____ notifications
- d** _____ functions
- e** _____ messages
- f** _____ lookup types

Definitions:

1	These route messages to one or more people.
2	This is the actual text included in a message
3	These are similar to global variables that can be referred to or updated by any activity in a process
4	These are lists of values that you can reuse with a variety of process activities
5	After defining their properties, you double-click these to open the Process Diagram window.
6	This is composed of a PL/SQL stored procedure or external program.

10 It's probably better to define messages before you define processes.

- a** True
- b** False

Practice 15-1 Solutions

Describing Oracle Workflows

Circle or write the best answer for each of the following statements.

- 1 With Oracle Workflow, you can route information and define business rules and processes.
 - a **True**
 - b False
- 2 A workflow process is a document or transaction.
 - a True
 - b **False. This statement describes an item. A workflow process is a series of actions taken to manage a document or transaction to achieve a desired result. A process is represented by a workflow diagram.**
- 3 A workflow item is a document or transaction.
 - a **True**
 - b False
- 4 A workflow function activity requires human intervention before it can finish processing.
 - a True
 - b **False. This statement describes a notifications activity. A workflow function activity is an automated unit of work that is defined by a program written as a PL/SQL stored procedure.**
- 5 A workflow activity is a unit of work that is performed in a process.
 - a **True**
 - b False
- 6 A workflow transition is the relationship that defines the completion of one activity and the activation of another activity.
 - a **True**
 - b False
- 7 You use the Workflow Navigator to build the actual process diagram.
 - a True
 - b **False. You use the process diagram to build the actual workflow. You use the Workflow Navigator to set up various workflow components, such as attributes and messages.**

Describing Oracle Workflows (continued)

- 8** A workflow item type includes components such as attributes, messages, and lookup types.
- a True**
 - b False**
- 9** Write the number of the definition with its related workflow component Workflow components:
- a 3** attributes
 - b 5** processes
 - c 1** notifications
 - d 6** functions
 - e 2** messages
 - f 4** lookup types

Definitions:

1	These route messages to one or more people.
2	This is the actual text included in a message
3	These are similar to global variables that can be referred to or updated by any activity in a process
4	These are lists of values that you can reuse with a variety of process activities
5	After defining their properties, you double-click these to open the Process Diagram window.
6	These are composed of PL/SQL stored procedures or external programs.

- 10** It's probably better to define messages before you define processes.
- a True**
 - b False**

Guided Practice 15-2

Using the Workflow Builder

This two-part guided practice demonstrates how to use the workflow builder. In Part I, you navigate the Workflow Builder and review a preseeded BIS workflow. In Part II, you construct a simple send notification workflow, similar to the one that you just reviewed. Wherever you see xx, enter your student number or terminal ID.

Part I: Navigating and Viewing a BIS Workflow

Opening Preseeded BIS Workflow

- 1 Double-click the Workflow Builder icon to launch the Oracle Workflow Builder.
- 2 From the File menu, select open.
The Open dialog window appears.
- 3 Select the Database option, and enter the following information, or enter the login information provided by the instructor.
 - User: apps
 - Password: apps
 - Connect: ESS

A list of workflows that reside on the database server appear. **Note:** This might take several seconds.

- 4 Scroll down the list of hidden workflows, select the HR BIS Corrective Action workflow, and click the Show button.
- 5 Click the OK button to add the workflow to the Navigator.
- 6 In the Workflow Navigator, verify that the workflow is selected and then select File—>Save As.

The Save As dialog window appears.

- 7 Select the File option, and then enter xx_Sample in the Filename field.
- 8 Click the OK button to save the workflow under new name.

The newly named workflow appears in the Navigator.

Viewing a Preseeded BIS Workflow These instructions assume that you are viewing the same workflow that you saved in the above section.

- 1 Expand the xx_Sample workflow, and answer the following questions.
- 2 List two of the workflow's attribute names:

- 3 What is the message name associated with the HR_GENERIC_NOTIFICATION?

Using the Workflow Builder (continued)

- 4 What are the two processes associated with this workflow?

- 5 Double-click one of the workflow processes. What are the components included in the process diagram?

- 6 What attributes are included in the message body of the HR_GENERIC_MESSAGE?

- 7 When you are finished, collapse the workflow and proceed to Part II.

Part II: Building a Workflow

Note: As you work through this example, you can refer to the preseeded workflow that you viewed in Part I for extra help.

Initial Workflow Definition

- 1 From the Workflow File menu, select Quick Start Wizard.
- 2 In the Internal Name field, enter `xx_WFBIS`.
- 3 In the Display Name field, enter `xx Custom Corrective Action`.
- 4 Select a persistence type of Permanent.
- 5 In the New Process region, Internal Name field, enter `xx_BIS_PROCESS`.
- 6 In the New Process region, Display Name field, enter `xx BIS Process`.
- 7 Click the OK button.

The Workflow Builder window opens, and the details of the workflow that you just created are displayed in the Navigator.

- 8 Close the Process Diagram window to return to the Navigator.
- 9 Select the folder labeled, Untitled-1.

Using the Workflow Builder (continued)

This is the folder that contains the workflow information that you just defined.

10 Press the right mouse button, and select Save from the shortcut menu.

11 In the Filename field, enter `xx_Custom_WF` and then click the OK button.

The workflow was saved to the local workflow directory; it's name now appears in place of Untitled-1.

Workflow Components After you define the basic workflow definition, including the item type, you must define the various components. In this practice, you need to define the following components:

- Three attributes
 - Subject
 - Exception Date
 - Role (employee name)
- One process: `xx Custom Send Process`
- One notification: `xx Custom Send Notification`
- Two functions
 - Start
 - End

Note: The Start and End functions are automatically created by the Quick Start Wizard.

- One message
- No lookup types

Defining Workflow Attributes The Workflow attributes represent the variable definitions that will later be used by a variety of workflow components, such as the Message component.

- 1** Expand the workflow item type by clicking the plus sign next to the `xx_Custom_WF` item type.
- 2** Select the Attributes icon, and press the right mouse button to display the shortcut menu.
- 3** From the shortcut menu, select New Attribute.
An attribute definition window opens.
- 4** In the Internal Name field, enter `xx_DEPT_NO`.
- 5** In the Display Name field, enter `xx Department Number`.
- 6** In the Type field, select Text.
- 7** Click the OK button to close the attribute window and return to the Navigator.
The new attribute appears.
- 8** Using the following attribute definition details, repeat steps 2 through 7 to define the remaining attributes.

Using the Workflow Builder (continued)

Exception Date:

Internal Name: xx_EXC_DATE

Display Name: xx Exception Date

Type: Date

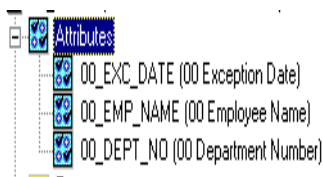
Format: MM-DD-YYYY

Role - Employee Name:

Internal Name: xx_EMP_NAME

Display Name: xx Employee Name

Type: Text



Defining Workflow Messages The Message component contains the actual message text that will be included in the send notification.

- 1 If it is not already expanded, expand the xx_Custom_WF item type.
- 2 Select the Messages icon, and press the right mouse button to display the shortcut menu.
- 3 From the shortcut menu, select New Message.
- 4 Enter the following information to define the message:

Message Tab

Internal Name: xx_BIS_MSG

Display Name: xx Department BIS Send Message

Body Tab:

Subject: Automatically populated from the Display Name field of the Message tab.

Text Body:

Dear &xx_EMP_Name,

You have received this BIS message because of an exception, dated &xx_EXC_DATE.

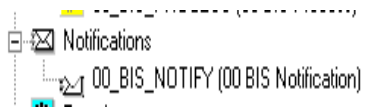
- 5 When you are finished, click the OK button to save the message properties and return to the Navigator.



Using the Workflow Builder (continued)

Defining Workflow Notifications Next, you will define the notification that will contain the message.

- 1 Select the Notifications icon, and then press the right mouse button and select New Notification.
- 2 Enter the notification properties as follows:
Internal Name: `xx_BIS_NOTIFY`
Display Name: `xx Custom BIS Notification`
Message: Select the BIS message that you set up in step 4.
- 3 When you finish defining the notification, click the OK button to save your work and return to the Navigator.



Defining Workflow Processes When you initially defined the workflow using the Workflow Wizard, you defined a process name. Workflow automatically added this process to your Processes group. It also included Start and End functions in this process. In this step, you will add the notification and appropriate links to complete the workflow.

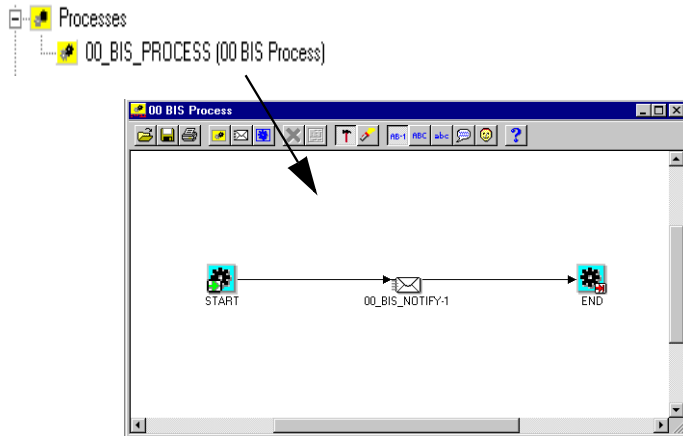
- 1 Collapse all of your workflow components and then reexpand it to view its contents in a more compact manner.
- 2 Expand the Processes component.
The process that you named when you initially defined the item type appears.
- 3 Double-click the process to open the process diagram window.
The process diagram window opens and includes Start and End functions.
- 4 Minimize the process diagram window so that you can view both the diagrammer and the Workflow Navigator windows.
- 5 In the Workflow Navigator window, expand the Notifications component.
- 6 Select the notification that you defined earlier and drag it into the process diagram window.
- 7 Position (by dragging) the icons in this window so that the notification falls between the Start and End processes.
- 8 Next, select the Start function and press the right mouse button and drag the mouse to the Notification icon.
A connection line automatically appears between the Start function and the notification.

Using the Workflow Builder (continued)

- 9 Select the Notification icon and press the right mouse button to drag the connection line between the Notification icon and the End function.

This action completes the workflow process diagram for this workflow. When the workflow engine runs, it uses this process to route the notification to the appropriate roles.

- 10 When you are finished, close the workflow diagrammer.



Technical Note

If you wanted this workflow to appear in the list of workflows for use in the BIS application, you must have saved it to the database.

Practice 15-2 Solutions

Solutions to the fill-in-the-blank questions.

Viewing a Preseeded BIS Workflow

1 Expand the xx_Sample workflow, and answer the following questions.

2 List two of the workflow's attribute names:

L_EXCEPTION_MESSAGE

L_EXCEPTION_DATE

Note: Your solutions may vary from those mentioned.

3 What is the message name associated with the HR_GENERIC_NOTIFICATION?

HR Generic Message. You can find this name by selecting the properties of the HR_GENERIC_NOTIFICATION notice.

4 What are the two processes associated with this workflow?

HR_SEND_NOTIFICATION

HR_SEND_NOTIFICATION_NO_LINK

5 Double-click one of the workflow processes. What are the components included in the process diagram?

START function

NOTIFICATION

END function

6 What attributes are included in the message body of the HR_GENERIC_MESSAGE?

&L_SUBJECT

&L_EXCEPTION_MESSAGE

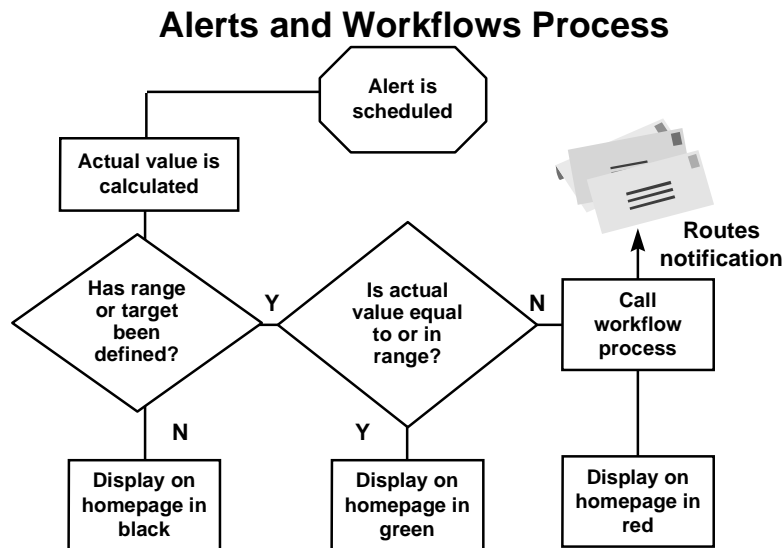
&L_URL

Practice 16-1

Describing BIS Alerts and Workflows

Circle or write the best answer for each of the following statements.

For the first four questions refer to the following diagram:



16-4

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ORACLE®

- 1 If no range or target is available when the actual value is posted, the actual value is displayed in black on the PHP.
 - a True
 - b False
- 2 If an actual value is out of range, it is displayed in which color on the PHP?
 - a Blue
 - b Green
 - c Red
 - d Black
- 3 If an actual value is within range, it is displayed in which color on the PHP?
 - a Blue
 - b Green
 - c Red
 - d Black
- 4 An actual value displayed in black means that the value is out of range.
 - a True
 - b False

Describing BIS Alerts and Workflows (continued)

- 5 Most BIS alerts consist of both a SQL statement and some type of package or procedure.
 - a True
 - b False
- 6 For each of the following BIS packages and procedures, write the number of its related definition:
 - a ____ BIS_POSTACTUAL.Post_Actual
 - b ____ BIS_POSTACTUAL.Get_Trgt_Level_Org
 - c ____ BIS_UTIL.Srt_Wf_Proces

Definitions

1	Initiates the workflow process
2	Inserts actual values into the table BIS_ACTUAL_VALUES tables
3	Retrieves all organizations against which to post actuals

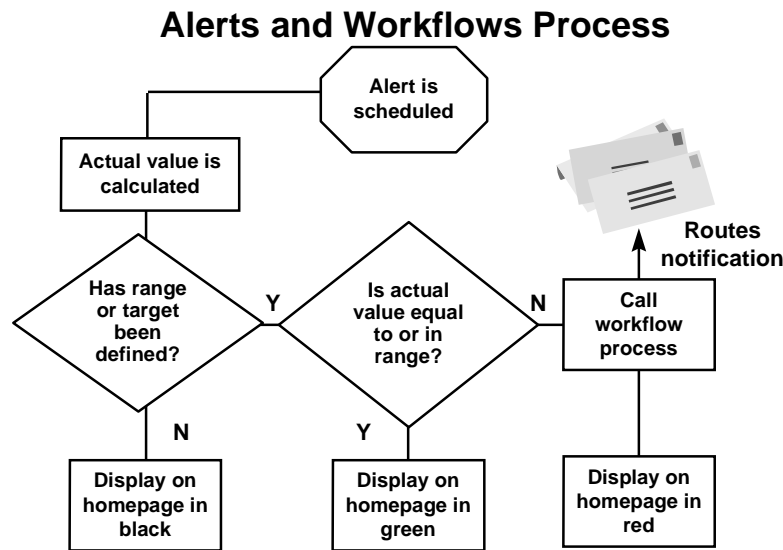
- 7 Oracle Alert uses BIS business process rules and delivers an electronic notification, when necessary.
 - a True
 - b False
- 8 Oracle Workflow evaluates the targets for performance measures and detects violations.
 - a True
 - b False
- 9 Number each of the following steps in the alerts and workflow process in the order in which it occurs in the overall process. (See Lesson 16 for help.)
 - a ____ Compare the actual and target values.
 - b ____ Retrieve the target and the workflow process and the responsibility assigned to it.
 - c ____ If the actual value is out of range, start the workflow process.
 - d ____ Retrieve the organization to which to post actuals.
 - e ____ Insert the actual value in the BIS_ACTUAL_VALUES table.

Practice 16-1 Solutions

Describing BIS Alerts and Workflows

Circle or write the best answer for each of the following statements.

For the first four questions, refer to the following diagram:



16-4

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ORACLE

- 1 If no range or target is available when the actual value is posted, the actual value is displayed in black on the PHP.
 - a **True**
 - b False
- 2 If an actual value is out of range, it is displayed in which color on the PHP?
 - a Blue
 - b Green
 - c **Red**
 - d Black
- 3 If an actual value is within range, it is displayed in which color on the PHP?
 - a Blue
 - b **Green**
 - c Red
 - d Black
- 4 An actual value displayed in black means that the value is out of range.
 - a True
 - b **False. A value displayed in black means that no target or range exists.**

Describing BIS Alerts and Workflows (continued)

- 5 Most BIS alerts consist of both a SQL statement and some type of package or procedure.
- a True
 - b False
- 6 For each of the following BIS packages and procedures, write the number of its related definition:
- a 2 BIS_POSTACTUAL.Post_Actual
 - b 3 BIS_POSTACTUAL.Get_Trgt_Level_Org
 - c 1 BIS_UTIL.Srt_Wf_Proces

Definitions

1	Initiates the workflow process
2	Inserts actual values into the table BIS_ACTUAL_VALUES
3	Retrieves all organizations against which to post actuals

- 7 Oracle Alert uses BIS business process rules and delivers an electronic notification when necessary.
- a True
 - b **False. This statement describes Oracle Workflow. Oracle Alert evaluates the targets for performance measures and detects violations.**
- 8 Oracle Workflow evaluates the targets for performance measures and detects violations.
- a True
 - b **False. This statement describes Oracle Alert. Oracle workflow uses BIS business process rules and delivers an electronic notification when necessary.**
- 9 Number each of the following steps in the alerts and workflow process in the order in which it occurs in the overall process. (See Lesson 16 for help.)
- a 4 Compare the actual and target values
 - b 1 Retrieve the target and the workflow process and the responsibility assigned to it.
 - c 5 If the actual value is out of range, start the workflow process.
 - d 2 Retrieve the organization to which to post actuals.
 - e 3 Insert the actual value in the BIS_ACTUAL_VALUES table.

Practice 16-2

Examining BIS Alerts and Workflows

In this practice, you access and examine several BIS alerts and workflows to become more familiar with their setup and operation. Use the login information provided by your instructor.

Part I: Examining BIS Alerts

As a BIS consultant, you want to verify that the FII AR Turnover Target Exception Notification alert exists and can be run successfully and is returning data.

You also want to view a description of the package that is included in this alert. To determine all of this information, you need to perform the following steps. As you gather information about this alert, record your answers in the spaces provided.

- 1 Access Alert Manager and query on the alert in question.
- 2 Run the alert and verify that it returns at least one row.
How many rows are returned? _____
- 3 Examine the alert's action details to obtain the procedure and package name.
What is the name of the alert package and procedure?

- 4 Using the SQL SELECT statement provided under "Hints and Tips" below, access SQL*Plus, and query the database table All_Source to view the contents of the procedure.
Provide a brief description of this alert package and the procedure that you wrote down in Step 3.

- 5 Use the scroll bar to view various parts of the package.
Does this package contain additional procedures? _____
- 6 Scroll to the bottom of the entire procedure.
What does the procedure return? _____
- 7 When you are finished, exit SQL*Plus, close any open alert windows, and return to the Oracle Applications Navigator.
Move onto Part II of this practice.

Examining BIS Alerts and Workflows (continued)

Hints and Tips for Examining BIS Alerts

- Access the Alert Manager. In the Name field, query on FII% and run the alert.
- Access the alert action details and write down the full package name. The package name follows the Begin statement in the alert SQL script. It is the part of the stored procedure/package that appears to the left of the period.
- Log into SQL*PLUS with the following username and password:
Username: apps Password: apps Host String: ESS
- In SQL*PLUS perform the following query:

```
Set Long 99999
SELECT text from ALL_SOURCE
WHERE name = 'NAME_OF_PACKAGE'
ORDER BY line;
```

Note: Make sure to enter the package name in all caps and include the single quotes. Do not include the procedure name, which appears to the right of the period.

- The procedure description typically appears immediately following the name of the procedure.

Part II: Examining BIS Workflows

In Part II, you examine the BIS corrective action workflow that is associated with the AR Turnover alert that you examined in Part I. Follow the steps listed below to access the BIS workflow.

- 1 Log into the BIS personal homepage with the following user ID and password:
User ID: xxpbluer
Password: xxbluer
- 2 Under the Self Service section of the Navigator menu, select the Workflow link.
The Workflow User Navigation menu appears.
- 3 Select the View Progress link.
The Find Processes Web page appears.
- 4 In the Item Type field, select the FII BIS Corrective Action item type.
- 5 Click the Find button to find notifications for this item type.
Note: Recall from Lesson 15 that an item type contains all of the components that you use to define the workflow process. The item type acts as the data store for each of these components. In this case, the AR Expense Report item type contains all of the components necessary to create the workflow related to accounts receivable expense reporting.
Two HR item types appear.
- 6 Select Item Key 62 and then click the View Diagram button.
The workflow diagram and its related details should appear.
Note: This might take several seconds.
- 7 Select the generic HR Notification icon and answer the following questions:
 - a What is the item type name associated with this workflow?

 - b Briefly describe the actual contents of the message associated with this notification. _____

 - c What is the message's subject line?

 - d Which responsibility is assigned to this notification?

Part II: Examining BIS Workflows (continued)

- e** Who is the recipient of the notification?

- f** What happens when you click the Recipient button?

- g** Select either the Start or the End node in the diagram. What differences do you notice in the details section of the diagram?

- 8** When you finish reviewing this workflow, click the Return to Homepage icon.

Practice 16-2 Solutions

Examining BIS Alerts and Workflows

In this practice, you access and examine several BIS alerts and workflows to become more familiar with their setup and operation. Use the login information provided by your instructor.

Examining BIS Alerts

As a BIS consultant, you want to verify that the FII AR Turnover Target Exception Notification alert exists and can be run successfully and is returning data.

You also want to view a description of the package that is included in this alert. To determine all of this information, you need to perform the following steps. As you gather information about this alert, record your answers in the space provided.

- 1 Access Alert Manager and query on the alert in question.

- 2 Run the alert and verify that it returns at least one row.

How many rows are returned? **3**

What values do you think that alert is retrieving from dual?

“M” Month

“Q” Quarter

“Y” Year

- 3 Examine the alert’s action details to obtain the procedure and package name.

What is the name of the alert package and procedure?

FII_ARTR_ALRT_PKG.PROCESS_TARGET_AR_TRN

When viewing BIS alerts, notice that the package contains many procedures for a given intelligence area.

- 4 Using the SQL SELECT statement provided under “Hints and Tips” below, query the database table All_Source to view the contents of the procedure.

Provide a brief description of this alert package and the procedure that you wrote down in step 3:

Package: FII_ARTR_ALRT_PKG: Entry point from the alert to the package for the AR Turnover. Calls the CHECK_MY_ALERT package with the following information: target level name, null, AR turnover calculation function.

Procedure: PROCESS_TARGET_AR_TRN: Calls the initialization routine and starts the alert calculations for AR Turnover.

- 5 Use the scroll bar to view various parts of the package.

Does this package contain additional procedures? **Yes**

- 6 Scroll to the bottom of the entire procedure.

What does the procedure return? **An actual value**

Examining BIS Alerts (continued)

- When you are finished, exit SQL*Plus, close any open alert windows, and return to the Oracle Applications Navigator.

Note: See the following pages for a more detailed solution to this problem.

Hints and Tips for Examining BIS Alerts

Access the Alert Manager. In the Name field, query on FII% and run the alert.

- From the Alert Manager responsibility, select Alert—>Define.
The Alerts window opens.
- Press [F11] to enter query mode.
- In the Name field, enter FII%, and then press [Ctrl][F11] to run the query.
The second window shows the results of the query.

The screenshot shows the Oracle Alerts Manager 'Define' window. The 'Name' field is set to 'FII%'. The 'Application' is 'Financials Intelligence'. The 'Frequency' is set to 'On Demand'. The 'Periodic Details' section shows 'Keep' set to 0 days. The 'Select Statement' field contains the following SQL query:

```
SELECT t1, pt
INTO &target_level, &period_type
FROM
(
select 'AR_TURNOVER' t1, 'M' pt from dual
union
select 'AR_TURNOVER' t1, 'Q' pt from dual
union
select 'AR_TURNOVER' t1, 'Y' pt from dual
);
```

The 'Run' button is visible at the bottom right of the window.

- Click the Run button to run the query.
A note should appear that informs you that three rows were selected. This step verifies that the alert can be run successfully and is retrieving data.
- Access the alert action details and write down the full package name. The package name follows the Begin statement in the alert SQL script. It is the part of the stored procedure/package that appears to the left of the period.
To access the action details, click the Actions button in the Alerts window, and then click the Action Details button.
The Action Details window opens.

Examining BIS Alerts (continued)

Action Details - FII_ARTRN_PROCESS

Action Type: SQL Statement Script

Application: Financials Intelligence

Arguments:

File (A) | Text (B)

```

set serveroutput on
begin
  FII_ARTR_ALERT_PKG.PROCESS_TARGET_AR_TRN(&target_level,&period_type);
end;

```

Import...

- 6** Record the alert package and procedure name:

FII_ARTR_ALERT_PKG.PROCESS_TARGET_AR_TRN

Note: The portion of the name to the left of the period is the package name. The portion of the name to the right of the package is the procedure name.

- 7** Log into SQL*Plus with the following username and password:

Username: apps_read_only password: apps

- 8** In SQL*Plus, perform the following query:

```

Set Long 99999
SELECT text from ALL_SOURCE
WHERE name = 'NAME_OF_PACKAGE'
ORDER BY line;

```

Note: Make sure to enter the package name in all caps. Do not include the procedure name, which appears to the right of the period.

```

SQL> SELECT text FROM all_source
      2  WHERE name = 'FII_ARTR_ALERT_PKG'
      3  ORDER BY line;

```

The resulting SQL statement is shown below.

Examining BIS Alerts (continued)

```
SQL> SELECT text FROM all_source
      2 WHERE name = 'FII_ARTR_ALERT_PKG'
      3 ORDER BY line;
```

TEXT

```
package FII_ARTR_ALERT_PKG AUTHID CURRENT_USER as
package body FII_ARTR_ALERT_PKG as
/* $Header: FIIALRAS.pls 115.3 99/10/04 18:20:37 porting sh $ */
/* $Header: FIIALRAB.pls 115.5 1999/11/12 11:25:41 pkm ship $ */
-- Name: PROCESS_TARGET_AR_TRN
-- Public Procedures
```

TEXT

```
-----
Desc: Entry point from Alert to the package for the AR Turnover.
Calls the check_my_alert package with the target level name, null,
AR Turnover calculation function name, report name (for exception
details - this report will be linked with the notification, report
Name: process_target_ar_trn parameter Desc: Wrapper routine for
starting the alert calculation. It calls initialization routine and start
the alert calculations for AR Turnover
```

The package description is shown in the second section headed “TEXT.” The procedure description follows the description of the package.

Part II: Examining BIS Workflows

In Part II, you examine the BIS corrective action workflow that is associated with the AR Turnover alert that you examined in Part I. Performing the following steps to access the BIS workflow.

- 1 Log into the BIS personal homepage with the following user ID and password:
User ID: xxpbluer
Password: xxbluer
- 2 Under the Self Service section of the Navigator menu, select the Workflow link.
The Workflow User Navigation menu appears.
- 3 Select the View Progress link.
The Find Processes Web page appears.
- 4 In the Item Type field, select the FII BIS Corrective Action item type.
- 5 Click the Find button to find notifications for this item type.

Examining BIS Alerts (continued)

Note: Recall from Lesson 15 that an item type contains all of the components that you use to define the workflow process. The item type acts as the data store for each of these components. In this case, the AR Expense Report item type contains all of the components necessary to create the workflow related to accounts receivable expense reporting.

Two HR item types appear.

- 6 Select Item Key 62 and then click the View Diagram button.

The workflow diagram and its related details should appear.

Note: This might take several seconds.

- 7 Select the generic HR Notification icon and answer the following questions:

The HR Notification icon must be selected to obtain answers to these questions.

- a What is the item type name associated with this workflow?

HR BIS Corrective Action

- b Briefly describe the actual contents of the message associated with this notification.

Select the Item tab for a description of the notification message. Message: A PMF target has been set up to monitor manpower separations. This target has been exceeded....

- c What is the message's subject line?

Select the Item tab for a description of the subject line. Subject: Manpower separations have exceeded a PMF target.

- d Which responsibility is assigned to this notification?

Select the Status tab to determine the responsibility. Assigned User: US Vision HR Intelligence.

- e Who is the recipient of the notification?

Select the Notification tab to determine the notification recipients: BERICKSO.

- f What happens when you click the Recipient button?

A summary of the notification appears.

- g Select either the Start or the End node in the diagram. What differences do you notice in the details section of the diagram?

The detailed definition information changes accordingly.

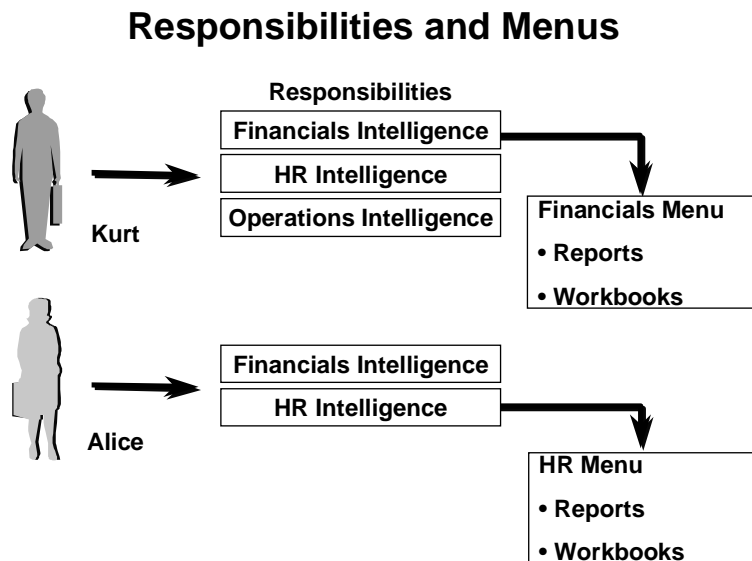
- 8 When you finish reviewing this workflow, click the Return to Homepage icon.

Practice 20-1

Describing BIS Postinstallation Requirements

Circle the best answer for each of the following statements.

- 1 Alex would like to customize the PHP, but when he clicks the Customize option in the Performance Measures region, nothing happens. Alex is most likely missing which of the following?
 - a Performance Management Framework (Full Access)
 - b Performance Management Framework (Targets Access)
 - c Preferences responsibility
 - d System Administrator responsibility
- 2 Write a T for true or F for false based on the information shown in the following diagram.



1-1

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- a ____ Because she shares some of the same responsibilities as Kurt, Alice can access the Plan Performance operations report.
- b ____ Because each user should be assigned only one responsibility, both responsibility situations, as described in the diagram, are invalid.

Describing BIS Postinstallation Requirements (continued)

- c ____ Alice needs access to some Manufacturing intelligence reports. This access must be granted through the Users window in the System Administration application.
 - d ____ Because responsibilities cannot be shared across users, Alice does not have access to the Operations intelligence.
- 3 Assume that you have already installed the Reports and Graphics components of Oracle Developer. Now you need to set up the reports environment variables. Based on this assumption, match the following definitions with their report environment variables.

Definitions:

- a ____ This variable is required to specify where the Web server looks for the report output.
- b ____ This variable represents the physical location where the report output is stored.
- c ____ This variable specifies whether the location of the report server cache is shared with the Web server's cache.
- d ____ This is a useful variable for debugging, but enabling it might represent an increased security risk.

Report Environment Variables:

- a REPORTS60_PHYSICAL_MAP
 - b REPORTS60_CGINODIAG
 - c REPORTS60_VIRTUAL_MAP
 - d REPORTS60_SHARED_CACHE
- 4 Janet cannot access the BIS-related End User Layer from the Discoverer Administration software. Which of the following might be the problem?
- a Janet has not modified the EUL owner indexes.
 - b Janet has not refreshed the business areas.
 - c Janet has not invoked the Discoverer UNIX Edition to specify the default EUL.
 - d Janet has not imported the `biseul.eex` file.
- 5 Several people in the finance department are having trouble accessing financials related analysis workbooks, but they can access several of the human resources workbooks. Which of the following is the likely problem?
- a The Discoverer administrator has not copied the necessary workbooks to the Discoverer Administration edition.
 - b The Discoverer End User Layer has not been synchronized with the underlying Oracle Applications.
 - c The Discoverer administrator has not set up the appropriate access for the financials-related analysis workbooks.
 - d Janet has not imported the `biseul.eex` file.

Describing BIS Postinstallation Requirements (continued)

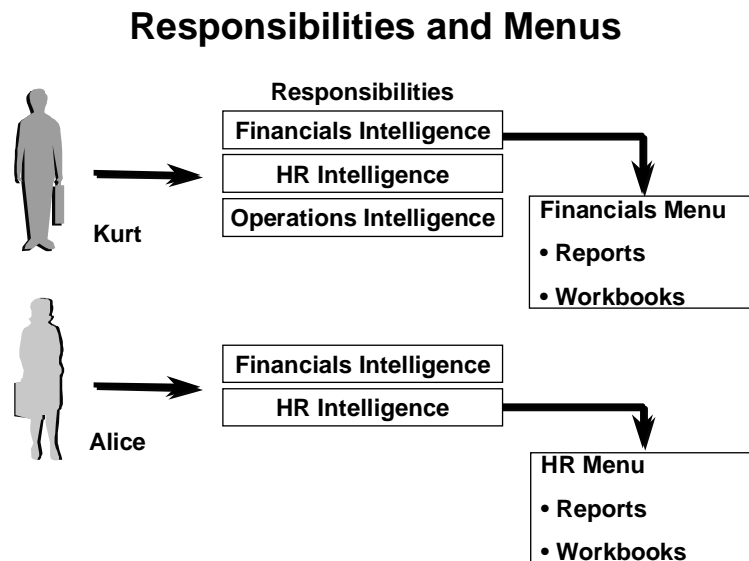
- 6** John was logged off the system because he had been logged on for 8 hours. The maximum amount of time that a user can be logged on is only 7.5 hours. Which Oracle Applications system variable specifies this limit?
- a** ICX: Report Images
 - b** ICX: Limit Time
 - c** ICX: Limit Connect
 - d** ICX: Resource Limit
- 7** Karly wants to limit the number of times a page can be hit per session. Which profile option does she should set to do this?
- a** ICX: Report Images
 - b** ICX: Limit Time
 - c** ICX: Limit Connect
 - d** ICX: Resource Limit
- 8** Alice wants to change the date format from DD-MON-RR to DD-MON-RRRR. Which of the following profile options must she update to perform this change?
- a** ICX: Numeric Characters
 - b** ICX: Date Language
 - c** ICX: Date Format mask
 - d** ICX: System Date
- 9** Based on the postinstallation steps described in Lesson 20, create your own BIS postinstallation checklist in the space provided below:

Practice 20-1 Solutions

Describing BIS Postinstallation Requirements

Circle the best answer for each of the following statements.

- 1 Alex would like to customize the PHP, but when he clicks the Customize option in the Performance Measures region, nothing happens. Alex is most likely missing which of the following?
 - a Performance Management Framework (Full Access)
 - b Performance Management Framework (Targets Access)
 - c **Preferences responsibility**
 - d System Administrator responsibility
- 2 Write a T for true or F for false based on the information shown in the following diagram.



1-1

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- a **F** Because she shares some of the same responsibilities as Kurt, only Alice can access the Plan Performance operations report. **Alice can access those reports that fall under the Financials and HR intelligence responsibilities.**

Describing BIS Postinstallation Requirements (continued)

- b** **F** Because each user should be assigned only one responsibility, both responsibility situations, as described in the diagram, are invalid. **Users can be assigned one or more responsibilities.**
 - c** **T** Alice needs access to some Manufacturing intelligence reports. This access must be granted through the Users window in the System Administration application. **You must assign responsibilities in the System Administration application.**
 - d** **T** Because responsibilities cannot be shared across users, Alice does not have access to the Operations intelligence. **For a single user, BIS security includes the concept of “union of security.” However, this concept does not apply to security between different users.**
- 3** Assume that you have already installed the Reports and Graphics components of Oracle Developer. Now you need to set up the reports environment variables. Based on this assumption, match the following definitions with their report environment variables.

Definitions:

- a** **c** This variable is required to specify where the Web server looks for the report output.
- b** **a** This variable represents the physical location where the report output is stored.
- c** **d** This variable specifies whether the location of the report server cache is shared with the Web server’s cache.
- d** **b** This is a useful variable for debugging, but enabling it might represent an increased security risk.

Report Environment Variables:

- a** REPORTS60_PHYSICAL_MAP
 - b** REPORTS60_CGINODIAG
 - c** REPORTS60_VIRTUAL_MAP
 - d** REPORTS60_SHARED_CACHE
- 4** Janet cannot access the BIS-related End User Layer from the Discoverer Administration software. Which of the following might be the problem?
- a** Janet has not modified the EUL owner indexes.
 - b** Janet has not refreshed the business areas.
 - c** Janet has not invoked the Discoverer UNIX Edition to specify the default EUL.
 - d** **Janet has not imported the `biseul.eex` file.**

Describing BIS Postinstallation Requirements (continued)

- 5 Several people in the finance department are having trouble accessing financials-related analysis workbooks, but they can access several of the human resources workbooks. Which of the following is the likely problem?
- a The Discoverer administrator has not copied the necessary workbooks to the Discoverer Administration edition.
 - b The Discoverer End User Layer has not been synchronized with the underlying Oracle Applications.
 - c **The Discoverer administrator has not set up the appropriate access for the financials-related analysis workbooks.**
 - d The Discoverer administrator has not imported the `biseul.eex` file.
- 6 John was logged off the system because he had been logged on for 8 hours. The maximum amount of time that a user can be logged on is only 7.5 hours. Which Oracle Applications system variable specifies this limit?
- a ICX: Report Images
 - b **ICX: Limit Time**
 - c ICX: Limit Connect
 - d ICX: Resource Limit
- 7 Karly wants to limit the number of times a page can be hit per session. Which profile option does she should set to do this?
- a ICX: Report Images
 - b ICX: Limit time
 - c **ICX: Limit Connect**
 - d ICX: Resource Limit
- 8 Alice wants to change the date format from DD-MON-RR to DD-MON-RRRR. Which of the following profile options must she update to perform this change?
- a ICX: Numeric Characters
 - b ICX: Date Language
 - c **ICX: Date Format Mask**
 - d ICX: System Date

Describing BIS Postinstallation Requirements (continued)

- 9** Based on the postinstallation steps described in Lesson 20, create your own BIS postinstallation checklist in the space provided below:

Practice 21-1

Setting Up BIS

Select the best answer for each of the following statements.

- 1 Assume that you need access to the revenue growth reports. Although you have access to the Financials Intelligence menus, the Revenue Growth menu does not appear. Which of the following problems might cause this?
 - a You have not been granted access to any other intelligence area, so the system cannot calculate summed revenue reports. Therefore, you cannot access the any revenue-related reports.
 - b The BIS Financials menu is lacking the appropriate tie to the Revenue Growth submenu, including the required association to revenue-related form functions.
 - c You have not been granted access to the Revenue Growth Intelligence area.
 - d Your name has not been added as a user to the form function form.
- 2 Ann's analysis workbooks contain no data. Her BIS consultant told Ann that business views must be generated before data appears in an analysis workbook. Is the consultant's statement true or false?
 - a True
 - b False
- 3 Which of the following responsibilities must Henry, a BIS consultant, access to define territory hierarchies?
 - a System Administrator
 - b BIS Super User
 - c General Ledger Super User
 - d Any super user responsibility will enable Henry to define territory hierarchies.
- 4 Henry is helping Jackson, a Vision Corporation operations manager, set up desired flexfield maps for the following Vision Corporation flexfield: Operating Unit Location. Jackson would like to map the *Operating Unit Number* and the state attributes to the appropriate dimensions. Using the information provided below, indicate the dimension, the dimension level, the end column username, and the application column name for the flexfield maps and related segment mapping.

Setting Up BIS (continued)

Flexfield Name: Operating Unit Location	
<u>End User Column</u>	<u>Application Column</u>
City	Attribute1
State	Attribute2
Postal Code	Attribute3
Oper. Unit No.	Attribute4

BIS Dimensions	
<u>Dimension</u>	<u>Dimension Levels</u>
Time	Year, Quarter, Month
Organization	HQ, Operating unit
Geography	Region, Area, State

Dimension	Dimension Level	End User Column Name	Application Column Name

- 5 Which of the following must be done before you can view lookup codes (and meanings) to ensure that they appear when users are drilling down selections in reports and workbooks?
 - a The flexfield map must be defined.
 - b The business views must be generated.
 - c The users must be assigned the appropriate responsibilities.
 - d The appropriate territory hierarchies must have already been set up.
- 6 Extensible links enable you to save a “Web of links,” including links to additional intelligence menus, in a BIS report’s “Related Information” section.
 - a True
 - b False

Setting Up BIS (continued)

- 7 Indicate the correct order of the Geography dimension and flexfield mapping setup steps:
- a ☐ Map the flexfield segment to the region dimension level.
 - b ☐ Use the online transaction processing forms to enter regions and areas.
 - c ☐ Map countries to areas and regions to countries.
 - d ☐ If you want to associate regions with a flexfield, open a descriptive flexfield segment.
- 8 Parameter passing means that, all parameters being equal, parameters from one report are automatically passed to a related report.
- a ☐ True
 - b ☐ False

Practice 21-1 Solutions

Setting Up BIS

Select the best answer for each of the following statements.

- 1 Assume that you need access to revenue growth reports. Although you have access to the Financials Intelligence menus, the Revenue Growth menu does not appear. Which of the following problems might cause this?
 - a You have not been granted access to any other intelligence area, so the system cannot calculate summed revenue reports. Therefore, you cannot access the any revenue-related reports.
 - b The BIS Financials menu is lacking the appropriate tie to the Revenue Growth submenu, including the required association to revenue-related form functions.**
 - c You have not been granted access to the Revenue Growth Intelligence area.
 - d Your name has not been added as a user to the form function form.
- 2 Ann's analysis workbooks contain no data. Her BIS consultant told Ann that business views must be generated before data appears in an analysis workbook. Is the consultant's statement true or false?
 - a True**
 - b False
- 3 Which of the following responsibilities must Henry, a BIS consultant, access to define territory hierarchies?
 - a System Administrator
 - b BIS Super User**
 - c General Ledger Super User
 - d Any superuser responsibility will enable Henry to define territory hierarchies.
- 4 Henry is helping Jackson, a Vision Corporation operations manager, set up desired flexfield maps for the following Vision Corporation flexfield: Operating Unit Location. Jackson would like to map the Operating Unit Number and State attributes to the appropriate dimensions. Using the information provided below, indicate the dimension, the dimension level, the end column username, and the application column name for the flexfield maps and related segment mapping.

Setting Up BIS (continued)

Flexfield Name: Operating Unit Location	
<u>End User Column</u>	<u>Application Column</u>
City	Attribute1
State	Attribute2
Postal Code	Attribute3
Oper. Unit No.	Attribute4

BIS Dimensions	
<u>Dimension</u>	<u>Dimension Levels</u>
Time	Year, Quarter, Month
Organization	HQ, Operating unit
Geography	Region, Area, State

Dimension	Dimension Level	End User Column Name	Application Column Name
Geography	State	State	Attribute2
Organization	Operating unit	Operating Unit Number	Attribute4

- 5 Which of the following must be done before you can view lookup codes (and their associated meanings) in drilldown selections for reports and workbooks?
- a The flexfield map must be defined.
 - b The business views must be generated.
 - c The users must be assigned the appropriate responsibilities.
 - d **The appropriate territory hierarchies must have already been set up.**
- 6 Extensible links enable you to set up a “Web of links,” including links to additional intelligence menus, in a BIS report’s “Related Information” section.
- a True
 - b **False. Extensible links enable you to set up links to other intelligence reports and URLs, but you cannot set up an extensible link that consists of an intelligence area menu or submenu.**

Setting Up BIS (continued)

- 7 Indicate the correct order of the Geography dimension and flexfield mapping setup steps:
 - a 3 Map the flexfield segment to the region dimension level.
 - b 1 Use the online transaction processing forms to enter regions and areas.
 - c 2 Map countries to areas and regions to countries.
 - d 4 If you want to associate regions with a flexfield, open a descriptive flexfield segment.
- 8 Parameter passing means that, all parameters being equal, parameters from one report are automatically passed to a related report.
 - a **True**
 - b False

Practice 21-2

Guided Practice: Viewing BIS Setup Information

In this practice, you will view some of the setup requirements in BIS. This practice has been divided into the following sections:

- Part I: Viewing responsibilities associated with various users
- Part II: Viewing form functions and menus
- Part III: Viewing flexfield maps and territory hierarchies

Note: The purpose of this practice is to familiarize you with some of the setup components in BIS. You will not actually be adding users, functions, menus, or flexfield maps to the system.

Part I: Responsibilities and Users

In this section, you view the various responsibilities associated with a given user. These are the responsibilities that appear on the personal homepage.

- 1 Log into the BIS PHP using the following user ID and password:
Use ID: xxpbluer
Password: welcome
- 2 Under Applications, select the System Administrator link.
The System Administrator Navigator appears.
- 3 From the Navigator select Security—>Users.
The Users window opens.
- 4 Press [F11] to enter query mode.
- 5 In the User Name field, enter pbluer, and press [Ctrl] + [F11] to run the query.
The responsibilities assigned to Pat Bluer appear.
- 6 Scroll through the list of responsibilities granted to Pat.
- 7 Select the username to make it active.
- 8 Press [F11] to enter query mode.
- 9 In the User Name field, enter korange, and press [Ctrl] + [F11] to run the query.
The responsibilities assigned to Kim Orange appear.
Notice the difference between the responsibilities assigned to Kim and those assigned to Pat.
- 10 When you are finished, close the Users window and return to the System Administrator Navigator.

Part II: Menus and Functions

In this section, you view the underlying menu structure and some of the functions associated with the personal homepage. These instructions assume that you are logged into the System Administration application under the username pbluer.

- 1 From the System Administrator Navigator, access the Menus window.
(N) Application—>Menu
The Menus window appears.
- 2 Press [F11] to enter query mode.
- 3 In the Menu field, enter `ICX_PREF%`, and press [Ctrl] + [F11] to run the query.
The major BIS functions appear with their associated menu prompts.
- 4 When you are finished viewing the ICX_Preferences menu, close the Menus window to return to the System Administrator Navigator.

Technical Note

If a function, such as the Business Views Catalog Search, is missing, check the ICX_Preferences menu to make sure that it has been set up in this menu.

To add a function to this menu, make sure the cursor is in the Seq field, and then click the New button. A blank row should appear in which you can add the function. For detailed instructions on adding the function, refer to the online help.

- 5 From the System Administrator Navigator, select Application—>Function.
The Form Functions window opens.
- 6 Press [F11] to enter query mode.
- 7 In the User Function Name field, enter `BIS_TR%`, and press [Ctrl] + [F11] to execute the query.
The function `BIS_TREND_PLUG` appears. This function represents one of the functions that you viewed under the ICX_Preferences menu. This function represents the Trend region on the BIS personal homepage.
- 8 Press [F11] again to enter query mode.
- 9 This time in the Function field, enter `BIS%`, and press [Ctrl] + [F11] to run the query.
A long list of BIS-related functions appear.
- 10 Click the Form tab.
Most of the Form fields are blank because these functions relate to the Web and not to a specific applications form.
- 11 Click the Web HTML tab.
You can now see the type of call that a particular function performs. Many of these functions run reports.
- 12 When you are finished, close the window to return to the System Administrator Navigator.

Part III: Flexfield Maps, Lookup Codes, and Territory Hierarchies

In Part III, you view the Flex Field Mappings and Define Territory Hierarchies windows.

Note: Although you will be performing actions in these windows, you will *not* save your work.

These instructions assume that you are logged into the System Administration application under the username pbluer.

Viewing Flexfield Maps

- 1 Switch responsibilities to the BIS Super User responsibility.
- 2 From the Navigator, select Map Flexfields.
The Flex Field Mappings window opens.
- 3 Press [F11] to enter query mode.
- 4 In the Flex Field Name field, enter Address% and press [Ctrl] + [F11] to run the query.
The Address Information (in the Oracle Receivables application) flexfield appears.
- 5 Select the Dimensions field, and then press [Ctrl] + [L] to view the list of available dimensions.
- 6 Select the Geography dimension, and then click the OK button.
- 7 Select the Level field, and then press [Ctrl] + [L] to view the list of available dimension levels.
- 8 Select the Region dimension level from the list of values, and then click the OK button.
From your actions in the previous steps, the Geography dimension appears in the Dimensions field, and the Region dimension level appears in the Level field.
- 9 Click the Segment Mapping button.
The Segment Mappings window for the Geography dimension appears.
- 10 In the Context Code field, press [Ctrl] + [L].
Because there is only one value for this field, Global Data Element, it is automatically populated.
- 11 In the End User Column Name field, press [Ctrl] + [L] to select the end user column: Ship From Warehouse.
The end user column name and the associated Oracle Application column name appear in their respective fields. Notice that the Oracle Application column name is the undefined flexfield column, ATTRIBUTE2.
- 12 Close each window to return to the Navigator. When you are asked if you want to save your changes, click the No button.

Part III: Flexfield Maps, Lookup Codes, and Territory Hierarchies

Viewing Lookup Codes Before you can set up territory hierarchies, you must first define associated lookup codes.

- 1 From the Navigator window, select Lookups: Define Areas and Regions.
The Application Object Library window appears.
- 2 Press [F11] to enter query mode.
- 3 In the Type field, enter `Region` and then press [Ctrl] + [F11] to run the query.
Two codes appear for the northeast and southeast United States. If no codes appeared, you would need to add them to this window before you could set up the associated territory hierarchy.
- 4 Close this window and return to the Navigator.

Viewing Territory Hierarchies After you set up lookup codes, you can add them to the appropriate territory hierarchy. These steps show you how to add lookup codes to a territory hierarchy. **Note:** Do not save your work.

- 1 From the Navigator, select Define Territory Hierarchies.
The Define Territory Hierarchies window appears.
- 2 In the Parent Territory Type field, select `Country` from the list of values.
- 3 In the Code field, select `US` from the list of values.
- 4 In the Child Territory region, Code field, select `NE` from the list of values.
Notice that the list of values is made up of the codes that were set up in the Application Object Library lookups window.
- 5 Select the next field, and add `SE` from the list of values.
Both regions now appear as children territories to the parent territory `US`. These values will appear in lists of values for fields associated with the United States.
- 6 Close the form, *without* saving your changes, to return to the Navigator.

Practice 22-1

Setting Up Intelligence Areas

Select the best answer for each of the following statements.

- 1 Janet, a BIS consultant, needs to run some financials-related concurrent programs. To do this, she should log into which of the following responsibilities:
 - a General Ledger Super User
 - b BIS Super User
 - c Purchasing Super User
 - d OPM Super User
- 2 BIS profile options specify information such as the location of report files, the default number format, and other customized features that might be related to an intelligence area.
 - a True
 - b False
- 3 If you want an alert to run immediately, you should specify which of the following alert detail types?
 - a On Demand
 - b Event
 - c Periodic
 - d On Day of the Month
- 4 Financial items and common stock are setup items under which of the following intelligence areas?
 - a Financials Intelligence
 - b Operations Intelligence
 - c Human Resources Intelligence
 - d Customer Intelligence
- 5 You use Oracle Fast Formula to set up many of the formulas required for this intelligence area.
 - a Financials Intelligence
 - b Operations Intelligence
 - c Human Resources Intelligence
 - d Process Manufacturing Intelligence
- 6 Yani just set up a predefined formula: TEMPLATE_DAYS_TO_HOURS. This formula is required for which of the following intelligence areas:
 - a Financials Intelligence
 - b Operations Intelligence
 - c Human Resources Intelligence
 - d Purchasing Intelligence

Setting Up Intelligence Areas (continued)

- 7** You set up MRP Plan profile options for which of the following intelligence areas?
- a** Financials Intelligence
 - b** Operations Intelligence
 - c** Human Resources Intelligence
 - d** Purchasing Intelligence
- 8** Omar needs to generate the data for the Period Inventory Turns report. Which of the following operations concurrent programs would you recommend he run?
- a** CSTBISLD-OBIS Margin Analysis Load Run
 - b** WIPBIN-Capture Production Indicators
 - c** INVTURNS-Summarize Balances
 - d** MRPBIS-Populate Forecast Analysis
- 9** Match the profile options prefix to their related intelligence area:
- a** _____ PMI
 - b** _____ WIP
 - c** _____ CRM BIS
 - d** _____ ICX
- 1. Operations Intelligence
 - 2. Customer Intelligence
 - 3. Process Manufacturing Intelligence
 - 4. General BIS application
- 10** Part of Customer Intelligence setup includes setting up specific data forms and profile options. For each of the following statements, write the number of the form or profile option that it describes.
- a** _____ This form enables you to enter the customer satisfaction index values for the industry standard or benchmark business plans.
 - b** _____ Enables system administrators to specify the range of values and weights for seeded loyalty measures.
 - c** _____ This defines the lowest granularity of time in which you can collect and view data.
 - d** _____ This is used to set up the currency that is displayed in all revenues and cost information reports.

Setting Up Intelligence Areas (continued)

- e. _____ Indicates the number of records shown in the customer transaction summary reports.
 1. BIC_CUSTREP_NUM
 2. Satisfaction Benchmark form
 3. CRMBIS: Currency Code
 4. CRMBIS: GL Conversion Type
 5. Loyalty form
 6. CRMBIS: Period Type

Practice 22-1 Solutions

Setting Up Intelligence Areas

Select the best answer for each of the following statements.

- 1 Janet, a BIS consultant, needs to run some financials-related concurrent programs. To do this, she should log into which of the following responsibilities?
 - a **General Ledger Super User**
 - b BIS Super User
 - c Purchasing Super User
 - d OPM Super User
- 2 BIS profile options specify information such as the location of report files, the default number format, and other customized features that might be related to an intelligence area.
 - a **True**
 - b False
- 3 If you want an alert to run immediately, you should specify which of the following alert detail types?
 - a On Demand
 - b **Event**
 - c Periodic
 - d On Day of the Month
- 4 Financial items and common stock are setup items under which of the following intelligence areas?
 - a **Financials Intelligence**
 - b Operations Intelligence
 - c Human Resources Intelligence
 - d Customer Intelligence
- 5 You use Oracle Fast Formula to set up many of the formulas required for this intelligence area.
 - a Financials Intelligence
 - b Operations Intelligence
 - c **Human Resources Intelligence**
 - d Process Manufacturing Intelligence

Setting Up Intelligence Areas (continued)

- 6 Yani just set up a predefined formula: TEMPLATE_DAYS_TO_HOURS. This formula is required for which of the following intelligence areas?
- a Financials Intelligence
 - b Operations Intelligence
 - c **Human Resources Intelligence**
 - d Purchasing Intelligence
- 7 You set up MRP Plan profile options for which of the following intelligence areas?
- a Financials Intelligence
 - b **Operations Intelligence**
 - c Human Resources Intelligence
 - d Purchasing Intelligence
- 8 Omar needs to generate the data for the Period Inventory Turns report. Which of the following operations-related concurrent programs would you recommend he run?
- a CSTBISLD-OBIS Margin Analysis Load Run
 - b WIPBIN-Capture Production Indicators
 - c **INVTURNS-Summarize Balances**
 - d MRPBIS-Populate Forecast Analysis
- 9 Match the profile options prefix to their related intelligence area:
- a 3 PMI
 - b 1 WIP
 - c 2 CRM BIS
 - d 4 ICX
- 1. Operations Intelligence
 - 2. Customer Intelligence
 - 3. Process Manufacturing Intelligence
 - 4. General BIS application

Setting Up Intelligence Areas (continued)

10 Part of Customer Intelligence setup includes setting up specific data forms and profile options. For each of the following statements, write the number of the form or profile option that it describes.

- a 2** This form enables you to enter the customer satisfaction index values for the industry standard or benchmark business plans.
- b 5** Enables system administrators to specify the range of values and weights for seeded loyalty measures.
- c 6** This defines the lowest granularity of time in which you can collect and view data.
- d 3** This is used to set up the currency that is displayed in all revenues and cost information reports.
- e 1** Indicates the number of records shown in the customer transaction summary reports.

- 1. BIC_CUSTREP_NUM
- 2. Satisfaction Benchmark form
- 3. CRMBIS: Currency Code
- 4. CRMBIS: GL Conversion Type
- 5. Loyalty form
- 6. CRMBIS: Period Type

Practice 22-2

Guided Practice: Submitting Concurrent Programs

In this guided practice, you submit one of the concurrent programs required to retrieve data from the transaction tables for use in BIS.

Submitting the General Ledger Financial Item Data Collection Program

- 1 Log into Oracle Applications with the following user ID and password:
Username: xxPbluer
Password: welcome
The General Ledger Super User Navigator appears.
- 2 From the Navigator, select Other—>Requests.
The Find Request window opens.
- 3 Click the Submit A New Request button, select Single Request from the Submit A New Request message box, and then click the OK button.
The Submit Request window opens.
- 4 In the Name field, select Program - Financial Item Data Collection from the list of values.
The required parameters automatically appear in the appropriate fields. **Note:** This is the GLOSUM concurrent program that collects the required data from the Oracle General Ledger system.
- 5 Click the Submit button to submit the GLOSUM collection program, and write down the request ID that is shown in the decision message box:_____.
- 6 Click the No button in response to the question about submitting another request.
The Find Request window automatically appears. Do not close this window, because it is used in the next section.

Viewing the Log File for the Concurrent Request

- 1 In the Request ID field of the Find Request window, enter the request ID that you wrote down in step 5 above, and then click the Find button.
- 2 The Request window opens showing the status of your request.
- 3 If the request status is not completed, click the Refresh button periodically to update the request; otherwise, go to step 4.
- 4 If the request phase and status are Completed and Normal, respectively, click the View Log button to view the results of the program.

Guided Practice: Submitting Concurrent Programs (continued)

Note: If your request completed with errors, please see the instructor.

Viewing Intelligence Reports After Submitting a Concurrent Request After the concurrent request successfully finishes, you can view the results of the data changes and updates by viewing the intelligence reports that include the data that was collected by the program.

Practice 22-3

Viewing Intelligence Area Profile Options

In this practice, you view some of the intelligence area setup components.

Wherever you see xx, substitute your student or terminal number.

- 1 Log into Oracle Applications System Administration using the following login information:
Username: xxPbluer
Password: welcome
- 2 From the System Administrator Navigator window, select Profile—>System.
The Find System Profile Values window opens.
- 3 In the Profile field, use the list of values to select the Financials Intelligence profile option: PA:Reporting Budget Type 2 (Cost). You can also query on PA: RE% to bring up all the profile options that start with this search string.
- 4 After you make your selection, click the OK button, and then click the Find button.
The site-level value for this profile option appears.
- 5 Press [Ctrl] + [E] to view the full value for the profile option.
- 6 Return to the Find System Profile Values window.
- 7 Find the profile option value for the following profile options. Write their values in the space provided below.
 - a PA: Reporting Role Type 1 (Cost)_____
 - b For the profile option, MRP: Plan Revenue Discount Percent, what is the site-level profile option value?_____
 - c What is the site-level default unit of measure for the PMI Default UOM Conversion profile option?_____
 - d Has a value been set for the POA: Global Security option?_____. If yes or no, what does this profile option determine?_____

- 8 When you are finished, log out of Oracle Applications.

Practice 22-3 Solutions

Viewing Intelligence Area Profile Options

In this practice, you will view some of the intelligence area setup components. Wherever you see xx, substitute your student or terminal number.

- 1 Log into Oracle Applications System Administration using the following login information:
Username: xxPbluer
Password: welcome
- 2 From the System Administrator Navigator window, select Profiles—>System. The Find System Profile Values window opens.
- 3 In the Profile field, use the list of values to select the Financials Intelligence profile option: PA:Reporting Budget Type 2 (Cost). You can also query on PA: RE% to bring up all the profile options that start with this search string.
- 4 After you make your selection, click the OK button, and then click the Find button. The site-level value for this profile option appears.
- 5 Press [CTRL] + [E] to view the full value for the profile option.
- 6 Return to the Find System Profile Values window.
- 7 Find the profile option value for the following profile options. Write their values in the space provided below.
 - a PA: Reporting Role Type 1 (Cost) **Project Manager**
 - b For the profile option, MRP: Plan Revenue Discount Percent, what is the site-level profile option value? **10%**
 - c What is the site-level default unit of measure for the PMI Default UOM Conversion profile option? **Pound**
 - d Has a value been set for the POA: Global Security option? **No**. If yes or no, what does this profile option determine? **Determines the access levels to operating units**
- 8 When you are finished, log out of Oracle Applications.

Practice 23-1

Describing BIS Maintenance Requirements

Select the best answer for each of the following statements.

- 1 Which of the following is *not* part of ongoing BIS maintenance requirements?
 - a Schedule and run periodic processes
 - b Set up initial user access
 - c Refresh Discoverer business areas
 - d Test BIS components after adding new ones
- 2 The refresh process ensures that new data from the database appears in the performance measures displayed in Discoverer workbooks.
 - a True
 - b False
- 3 Users can continually update and customize their personal homepage.
 - a True
 - b False
- 4 Which of the following testing steps would *not* help you to verify that the personal is operational?
 - a Logging into Self-Service Web Applications
 - b Verifying that reports run by selecting a variety of reports from the intelligence area menus
 - c Clicking the Customize page icon to make sure that you can access PHP customization features
 - d Verifying that all the appropriate regions and menus are available
- 5 To ensure that BIS users have the latest report, you should schedule concurrent programs to run at specified intervals.
 - a True
 - b False
- 6 Whenever new data is added to the database, the Discoverer automated refresh program runs. This program refreshes both the Discoverer Administration Edition and the Discoverer End User Edition.
 - a True
 - b False
- 7 BIS requires that you set up different tabbed pages for each PHP region.
 - a True
 - b False

Practice 23-1 Solutions

Describing BIS Maintenance and Test Requirements

Select the best answer for each of the following statements.

- 1 Which of the following is *not* part of ongoing BIS maintenance requirements?
 - a Scheduling and running periodic processes
 - b Setting up initial user access**
 - c Refreshing Discoverer business areas
 - d Testing BIS components after adding new ones
- 2 The refresh process ensures that new data from the database appears in the performance measures displayed in Discoverer workbooks.
 - a True
 - b False. The refresh process ensures that new data from the database appears in business views and their related Discoverer workbooks.**
- 3 Users can continually update and customize their personal homepage.
 - a True**
 - b False
- 4 Which of the following testing steps would *not* help you to verify that the personal homepage is operational?
 - a Logging into Self-Service Web Applications
 - b Verifying that reports run by selecting a variety of reports from the intelligence area menus**
 - c Clicking the Customize page icon to make sure that you can access PHP customization features
 - d Verifying that all the appropriate regions and menus are available
- 5 To ensure that BIS users have the latest report, you should schedule concurrent programs to run at specified intervals.
 - a True**
 - b False
- 6 Whenever new data is added to the database, the Discoverer automated refresh program runs. This program refreshes both the Discoverer Administration Edition and the Discoverer User Edition.
 - a True
 - b False. There is no Discoverer automated refresh program. You determine the frequency of refreshes based on how frequently data is updated and the importance of newly added data.**

Describing BIS Maintenance and Test Requirements (continued)

- 7 BIS requires that you set up different tabbed pages for each PHP region.
- a True
 - b **False. You can set up many regions on one tabbed page. Or, you can set up one region per tabbed page. BIS enables users to determine on which tabbed pages regions appear.**

B

Summary of BIS 11*i* **Content**

BIS Release 11i Summary Content

Intelligence Reports, Analysis Workbooks, and Performance Measures

The tables in this appendix summarize the content of *Oracle Business Intelligence System, Release 11i*. They list all of the business perspectives, management areas, intelligence reports, performance measures, and analysis workbooks available for release 11i.

Note: See *Oracle Business Intelligence Implementation Guide, Release 11i*.

Call Center Intelligence Content

Note: There are no performance measures or analysis workbooks for Call Center Intelligence.

Management Area	Reports	Performance Measures
Abandon call reports	<ul style="list-style-type: none"> Abandon Call Rate Abandon Call — Time Series Calls Answered vs. Abandoned Calls Wait to Abandon — by Wait Ranges Wait to Abandon — by Center 	<ul style="list-style-type: none"> BIX Abandon Call Rate BIX Average Wait Time to Abandon
Activity, transfer, and transaction reports	<ul style="list-style-type: none"> All Call Activity Average Agent Transaction Time Average Caller Transaction Time Transferred Call Rate vs. Goal 	BIX Average Talk Time
Availability, occupancy, and utilization reports	<ul style="list-style-type: none"> Availability Rate Occupancy Rate vs. Goal Occupancy Rate — Comparison Utilization Rate vs. Goal Utilization Rate — Comparison 	BIX Occupancy Rate
Calls answered and offered reports	<ul style="list-style-type: none"> Calls Answered by Type — Bar Calls Answered by Center — Bar Calls Answered — Time Series Calls Offered — Time Series 	BIX Calls Answered
Productivity reports	<ul style="list-style-type: none"> Agent vs. Goal Agent vs. Group Agent vs. Campaign Agent vs. Center Group vs. Center 	

Management Area	Reports	Performance Measures
Service level and speed to answer reports	<ul style="list-style-type: none"> • Service Level vs. Goal • Average Speed to Answer — Bar • Average Speed to Answer — Line 	<ul style="list-style-type: none"> • BIX Service Level Rate • BIX Speed to Answer Benchmark
Summary reports	<ul style="list-style-type: none"> • Inbound Agent Summary • Inbound Center Summary • Contact Center Activity Summary • Contact Center Activity Center Summary — Comparison 	
Time reports	<ul style="list-style-type: none"> • Outbound Call Center Summary • Average Talk Time • Productive vs. Non-Productive Time — • Agent Level • Productive vs. Non-Productive Time — • Comparison • Telephone Time 	
Interaction blending reports	<ul style="list-style-type: none"> • Blended Occupancy Rate • Blended Utilization Rate • Blended Service Level 	BIX Utilization Rate

BIS Content for Customer Intelligence

Note: There are no analysis workbooks for Customer Intelligence.

Management Area	Intelligence Reports	Performance Measures
Customer Overview	<ul style="list-style-type: none"> Customer Account List Customer Account Information Customer Account Orders List Customer Account Invoices List Customer Account Installed Base List Customer Account Service Requests List Customer Account Contracts List Customer Account Contacts List Customer Account Sales Quotes List Customer Account Sales Revenue List Customer Account Sales Opportunities List Customer Account Interactions List Customer Account Campaigns List Customer Account Order Detail Customer Account Invoice Detail Customer Account Installed Base Detail Customer Account Service Request Detail Customer Account Contract Detail Customer Account Sales Quote Detail Customer Account Revenue Detail Customer Account Sales Opportunity Detail Customer Account Interaction Detail Customer Account Campaign Detail Customer Intelligence Overview — Year over Year Customer Intelligence Overview by Dimension 	
Customer Acquisition	<ul style="list-style-type: none"> Customer Acquisition Analysis — Year over Year Customer Acquisition Analysis by Dimension 	

Management Area	Intelligence Reports	Performance Measures
Customer Activation	<ul style="list-style-type: none"> Customer Activation Analysis — Year over Year Customer Activation Analysis by Dimension 	
Customer Retention	<ul style="list-style-type: none"> Customer Retention Analysis — Year over Year Customer Retention Analysis by Dimension Customer Retention Portfolio Analysis 	Customer Retention
Customer Profitability	<ul style="list-style-type: none"> Customer Profitability Analysis — Year over Year Customer Profitability Analysis — by Dimension 	Customer Profitability
Customer Revenue	<ul style="list-style-type: none"> Customer Revenue Analysis — Year over Year Customer Revenue Analysis by Dimension 	
Customer Costs	<ul style="list-style-type: none"> Customer Costs Analysis — Year over Year Customer Costs Analysis by Dimension 	
Customer Lifecycle	<ul style="list-style-type: none"> Customer Lifecycle Analysis — Distribution Customer Lifecycle Analysis — Distribution and Trend 	
Customer Satisfaction	<ul style="list-style-type: none"> Customer Satisfaction Analysis — Year over Year Customer Satisfaction Analysis by Dimension Customer Satisfaction Analysis — Quality Customer Satisfaction Analysis — Shipment Customer Satisfaction Analysis — Billing Customer Satisfaction Analysis — Service Customer Satisfaction Analysis — Contract 	Customer Satisfaction
Customer Loyalty	<ul style="list-style-type: none"> Customer Loyalty Analysis — Year over Year Customer Loyalty Analysis by Dimension Customer Loyalty Analysis by Loyalty Index 	Customer Loyalty

BIS Content Financials Intelligence

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Revenue Growth	<ul style="list-style-type: none"> Revenues Sales Revenues Customer Satisfaction Product Quality Resource Utilization Manpower Trends > Manpower Analysis (9) Summary Manpower Analysis Manpower Gains Manpower Losses Separations Trend by Leaving Reason Separations Trend by Service Band Separations by Leaving Reason Separations by Service Band Separations by Competence 	<ul style="list-style-type: none"> Revenue Sales Revenue Growth% Return by Value (5) On-Time Shipment by Line (6) On-Time Shipment by Value (7) Actual-to-Schedule (8) Scrap% Production Yield Resource Utilization (1) Manpower Variance Manpower Separation 	<ul style="list-style-type: none"> GL Analysis Product Revenue Analysis Customer Satisfaction Analysis Product Quality Analysis Resource Utilization Analysis
Profitability	<ul style="list-style-type: none"> Profit Margin Contribution Margin Earnings Per Share Current Ratio Analyst Summary 		GL Analysis
Expenses	<ul style="list-style-type: none"> Expenses Invoices and Payments Cash Forecasts Expense Reports Customer Satisfaction Nonconformance by Organization Nonconformance by Defect Code Nonconformance by Item Nonconformance by Lot Number Nonconformance by Plan Nonconformance by Plan Type 	<ul style="list-style-type: none"> Return by Value (5) On-Time Shipment by Line (6) On-Time Shipment by Value (7) Actual-to-Schedule (8) 	<ul style="list-style-type: none"> Customer Satisfaction Analysis Quality Nonconformance Analysis Quality Nonconformance Analysis Quality Global Results Analysis

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Asset Utilization	<ul style="list-style-type: none"> Asset Responsibility Asset Aging Asset Aging by Category Asset Cost Distribution Resource Utilization 	Resource Utilization (1)	Resource Utilization Analysis
Risks	<ul style="list-style-type: none"> Forecast Accuracy Customer Satisfaction Collection Indicators Trading Partners Activity 	<ul style="list-style-type: none"> MRP Forecast Error% MRP Forecast Error% by Demand Class Return by Value (5) On-Time Shipment by Line (6) On-Time Shipment by Value (7) Actual-to-Schedule (8) AR Turnover Days Sales Outstanding Weighted Average Balance Weighted Average Days Late 	<ul style="list-style-type: none"> Customer Satisfaction Analysis Receipts Analysis Billing Analysis Cash Flow Analysis
Cash	Cash Forecasts	<ul style="list-style-type: none"> Cash Flow Analysis Billing Analysis 	<ul style="list-style-type: none"> Cash Flow Analysis Limits Utilization Analysis Net Position Analysis
Projects	Projects Performance		<ul style="list-style-type: none"> Project Margin Analysis Project Revenue Analysis Project Cost Analysis

Notes:

- (1) This performance measure has been renamed Resource Utilization in BIS 11*i* (which comes with alerts and workflows).
- (2) These three performance measures, Gross Margin by Year, Gross Margin by Product and Gross Margin by Sales Channel in BIS 1.2 (with no alerts or workflows), have been merged into Gross Margin, a new performance measure with BIS 11*i*, with alerts and workflows.
- (3) This report is the result of merging six BIS 1.2 reports, Gross Margin by Year, Gross Margin by Quarter, Gross Margin by Period, Gross Margin by Product Group, Gross Margin by Assembly, and Gross Margin by Sales Channels.
- (5) This performance measure has been renamed Return Percentage for BIS 11*i*.
- (6) This performance measure was called On-Time Delivery in BIS 1.2.
- (7) This performance measure was originally planned to be called On-Time Shipment Delivery for BIS 11*i*.
- (8) This performance measure was called On-Time Shipment in BIS 1.2.
- (9) This report has a different menu entry name than the report name. The first name is the menu entry name.

Human Resources Intelligence Content

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Manpower Management	<ul style="list-style-type: none"> Summary Manpower Analysis Manpower Gains Manpower Losses Separations by Trend by Service band Separations Trend by Leaving Reason Separations by Leaving Reason Separations by Service Band Separations by Competence Manpower Comparison Manpower Ratio Manpower Budgets (1) 	<ul style="list-style-type: none"> Manpower Variance Manpower Separation 	Manpower Budget Analysis
Manpower Variance by Organization	<ul style="list-style-type: none"> Organization Manpower Summary Manpower Analysis Organization Separation Separations by Leaving Reason Organization Budget Manpower Budgets (1) 		

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Recruitment	Recruitment Success	Recruitment Success	<ul style="list-style-type: none"> Recruitment Time Analysis (5) Recruitment Analysis (2) Recruitment Efficiency Analysis (3) Terminated Job Applications Analysis (4)
People Performance	<ul style="list-style-type: none"> Hours Worked (6) Absence Hours (7) 		
Employee Development	<ul style="list-style-type: none"> Group Skills > Groups Skills Analysis (13) Skill Levels (9) Individual Skills Analysis Training Classes by Competence (11) Training Success 	Training Success	
Employee Compensation	<ul style="list-style-type: none"> Salary and Grade Range Salary Component Trend Average Salary Trend Salary Spread by Age, Length of Service, Grade Average Salary by Group (by EEO Category (US only), Grade, Job, Location, Sex, Performance, Service Band 		

Notes:

- (1) This report was named Budget Analysis in BIS 1.2.
- (2) This workbook was named Summary of Application by Recruitment Activity and Vacancy in BIS 1.2.
- (3) This workbook was named Hiring Ratio in BIS 1.2.
- (4) This workbook was named Application to Drop Out Analysis in BIS 1.2.
- (5) This workbook was first named Time to Recruit Analysis and renamed Time to Recruit by Vacancy in BIS 1.2.

- (6) This report was named Hours Worked Analysis in BIS 1.2.
- (7) This report was named Absence Hours Analysis in BIS 1.2.
- (9) This report was named Skill Selection in BIS 1.2.
- (10) Includes a location parameter that is not part of the Geography dimension.
- (11) This report was named Training Skills Analysis in BIS 1.2.
- (13) This report has a different menu entry name than the report name. The first name is the menu entry name.

Operations Intelligence Content

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Production	<ul style="list-style-type: none"> Plan Performance Plan Performance Trend Organization Plan Performance Late Orders Resource Utilization Production Efficiency Production Efficiency by Department Production Efficiency by Period Production by Completed Late Nonconformance by Organization Nonconformance by Defect Code Nonconformance by Item Nonconformance by Lot Number Nonconformance by Plan Nonconformance by Plan Type Inventory Turns by Period Inventory Turns by Organization WIP Inventory Trends Production per Employee Production per Employee by Period Performance to MPS Performance to MPS by Product Performance to MPS by Week Projects Performance 	<ul style="list-style-type: none"> MRP Inventory Turns (*) MRP Gross Ontime Delivery (*) RP Planned Utilization (*) Resource Utilization (1) Production Efficiency Inventory Turns WIP Inventory Trend Production Per Employee 	<ul style="list-style-type: none"> Resource Utilization Analysis Quality Nonconformance Analysis Quality Global Results Analysis Project Margin Analysis Project Revenue Analysis

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Quality	<ul style="list-style-type: none"> Product Quality (1) Nonconformance by Organization Nonconformance by Defect Code Nonconformance by Item Nonconformance by Lot Number Nonconformance by Plan Nonconformance by Plan Type Scrap by Reason 	<ul style="list-style-type: none"> Scrap% Production Yield 	<ul style="list-style-type: none"> Quality Nonconformance Analysis Quality Global Results Analysis
Planning	<ul style="list-style-type: none"> Forecast Accuracy Forecast Trend Demand Class Accuracy Plan Performance Plan Performance Trend Organization Plan Performance Later Orders Performance to MPS Performance to MPS by Product Performance to MPS by Week 	<ul style="list-style-type: none"> MRP Forecast Error% (*) MRP Forecast Error% by Demand Class MRP Inventory Turns (*) MRP Gross Margin% (*) MRP Ontime Delivery% (*) MRP Planned Utilization% (*) 	Forecast Analysis
Planning	<ul style="list-style-type: none"> Forecast Accuracy Forecast Trend Demand Class Accuracy Demand Class Trend Plan Performance Plan Performance Trend Organization Plan Performance Late Orders Performance to MPS Performance to MPS by Product Performance to MPS by Week 	<ul style="list-style-type: none"> MRP Forecast Error% (*) MRP Forecast Error% by Demand Class MRP Inventory Turns (*) MRP Gross Margin% (*) MRP Planned Utilization (*) 	Forecast Analysis

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Materials Management	<ul style="list-style-type: none"> • Inventory Value • Cycle Count Accuracy by Period • Cycle Count Accuracy by Organization • Pack Slip Control • Inventory Value by Organization • Inventory Turns by Period • Inventory Turns by Organization 	<ul style="list-style-type: none"> • Inventory Accuracy • Backorders by Line (2) 	Supply Chain Inventory Analysis
Order Management	<ul style="list-style-type: none"> • Sales Revenue • Gross Margin (12) • Gross Margin by Assembly • Gross Margin by Product Group • Gross Margin by Quarter • Gross Margin by Sales Channel • Gross Margin by Year • Bookings and Billings • Product Group Bookings • Sales Channel Bookings • Product Group Backlog • Sales Channel Backlog • Customer Satisfaction • Top Customer Activity 	<ul style="list-style-type: none"> • Sales Revenue Growth • Gross Margin by Product (2) • Gross Margin by Channel (2) • Gross Margin (2) • Backorders • Return by Value (5) • Ontime Shipment by Line (6) • Ontime Shipment by Value (7) • Actual-to-Schedule (8) 	<ul style="list-style-type: none"> • Product Revenue Analysis • Product Margin Analysis (4) • Bookings Analysis • Backlog Analysis • Customer Satisfaction Analysis
Logistics	<ul style="list-style-type: none"> • Fulfillment Performance • Pick Slip Control 	<ul style="list-style-type: none"> • Actual-to-Schedule (8) • Schedule-to-Request (10) • Backorders by Line (2) 	

Notes:

- (1) This performance measure has been renamed to Resource Utilization (and comes with alerts and workflows) for BIS 11i.
- (2) This performance measure was called Backorders in BIS 1.2.
- (5) This performance measure was called Return Percentage in BIS 1.2.
- (6) This performance measure was called On-Time Delivery in BIS 1.2.
- (7) This Performance measure was called On-Time Shipment Percentage in BIS 1.2.
- (8) This performance measure was called On-Time Shipment in BIS 1.2.
- (9) This performance measure was called Return Percentage in BIS 1.2.
- (10) This performance measure was called Fill Rate in BIS 1.2.
- (*) These six MRP performance measures have alerts that send notifications but do not post the actuals due to planning and functional requirements that BIS does not support at this time. Because the actuals are not posted, they do not show up on the personal homepage. This requirement is anticipated to be supported in BIS 11+.
- (11) The Product Quality report includes the Production Yield report from BIS 1.2.
- (12) This report is the result of merging six reports from BIS 1.2: Gross Margin by Year, Gross Margin by Quarter, Gross Margin by Period, Gross Margin by Product Group, Gross Margin by Assembly, and Gross Margin by Sales Channel.

Process Manufacturing Content

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Production	<ul style="list-style-type: none"> OPM Late Completed Batches OPM Current Batches Status OPM Top Ten Products OPM Top Ten Ingredients OPM Production Yield OPM Production Usage OPM Production Yield vs. Usage OPM Production Yield Variance OPM Production USage Variance 	OPM Inventory Turns	
Inventory	<ul style="list-style-type: none"> OPM Inventory Turns OPM Onhand Inventory 	OPM Inventory Turns Measure	
Costing			Cost Analysis
Order Management			Product Analysis

Purchasing Content

Management Area	Intelligence Reports	Performance Measures	Analysis Workbooks
Purchasing	<ul style="list-style-type: none"> Purchase to Sales Ratio Contract Leakage Trend Supplier Performance Supplier Consolidation Impact Contract Savings Summary (2) Contract Savings (1) Purchases (3) Trading Partners Summary 	<ul style="list-style-type: none"> Purchase to Sales Ratio Contract Leakage% 	Contract Savings Analysis

Notes:

(1) These three reports, Contract Savings by Commodity, Contract Savings by Organization and Contract Savings by Supplier, have been merged into the new Contract Savings report for BIS 11i.

(2) The Contract Savings report has been renamed Contract Savings Summary for BIS 11i.

(3) The Item Purchases report in BIS 1.2 has been renamed Purchases in release 11i and is the result of the merger of two BIS 1.2 reports, Item Purchase and Commodity Purchase.

C

BIS Intelligence Area Setup Components

Overview

This appendix contains the following BIS setup items:

- Intelligence area profile options
- Intelligence area concurrent programs
- Intelligence area performance measures, target levels, alerts, and workflow summary

Call Center Intelligence Setup Items

Call Center Intelligence Profile Options

Profile Option Name	Description
None	

Call Center Intelligence Concurrent Programs

Concurrent Program Name	Description
BIXSUMPB—BIX Interaction Summary Load	Populates the Interaction Summary tables
BIXSERSB—BIX Server Summary Load	Populates the Server Summary tables
BIXPURIN	Purges Interactions table

Performance Measures, Target Levels, Alerts, and Workflows

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
BIX Abandon Call Rate By Month By Center		BIX: Abandon Call Rate Alert	BIX Corrective Action	BIX_SEND_NOTIFICATION
Average Talk Time by Month By Center for All Org		BIX: Average Talk Time Alert	BIX Corrective Action	BIX_SEND_NOTIFICATION
Average Wait Time to Abandon By Month By Center for All Org		BIX: Average Wait to Abandon Alert	BIX Corrective Action	BIX_SEND_NOTIFICATION
Calls Answered for All Org By Month By Center		BIX: Calls Answered Alert	BIX Send Notification	BIX_SEND_NOTIFICATION
BIX Occupancy Rate By Month By Center		BIX: Occupancy Rate Alert	BIX Corrective Action	BIX_SEND_NOTIFICATION
Service Level By Month By Center for All Org		BIX: Service Level PMF Alert	BIX Corrective Action	BIX_SEND_NOTIFICATION
BIX Utilization Rate By Month By Center for All Org		BIX: Utilization Rate Alert	BIX Corrective Action	BIX_SEND_NOTIFICATION
Speed to Answer By Month By Center for All Org		BIX: Average Speed to Answer Alert	BIX Corrective Action	BIX_SEND_NOTIFICATION

Customer Intelligence Setup Items

Customer Intelligence Profile Options

Profile Option Name	Description
BIC_SMRY_EXTRACTION_DATE	Indicates the last date when the extraction program was run
BIC_CUSTREP_NUM	Indicates the number of records shown in the customer transaction summary reports
BIC_DEBUG	Used to instruct the system to log (or not log) debug messages in the BIC_DEBUG table
CRMBIS: Currency Code	Used to set up the currency that is displayed in all revenue and cost information reports
CRMBIS:GL Conversion Type	Designates the conversion type to be used when converting to the currency specified in the profile option CRMBIS: Currency Code
CRMBIS: Period Set Name	Designates which accounting calendar is used by concurrent programs to populate summary tables and the time dimensions of reports
CRMBIS: Period Type	Defines the smallest unit of time at which you can collect and view data

Customer Intelligence Concurrent Programs

Concurrent Program Name	Description
BICSUMM-Customer Summary Extraction	Extracts customer summary data

Performance Measures, Target Levels, Alerts, and Workflows

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
Measure for Loyalty	BIC Loyalty Total	BIC: Loyalty	BIC Corrective Action	BIC Send Notification
Measure for Profitability	BIC Profitability Total	BIC: Profitability Customer	BIC Corrective Action BIC Corrective Action	BIC Send Notification BIC Send Notification
Measure for Retention	BIC Retention Total	BIC: Retention	BIC Corrective Action	BIC Send Notification
Measure for Satisfaction	BIC: Satisfaction	BIC: Satisfaction	BIC Corrective Action	BIC Send Notification

Financials Intelligence Setup Items

Financials Intelligence Profile Options

Profile Option Name	Description
PA: Reporting Class Category 1	Maps class categories to projects
PA: Reporting Class Category 2	Maps class categories to projects
PA: Reporting Class Category 3	Maps class categories to projects
PA: Reporting Role Type 1 (System Default: Project Manager)	Maps role types to projects
PA: Reporting Role Type 1	Maps role types to projects
PA: Reporting Role Type 2	Maps role types to projects
PA: Reporting Role Type 3	Maps role types to projects
PA: Reporting Budget Type 1 (Cost) (System Default: Approved Cost Budget)	Maps budget types to budget amounts
PA: Reporting Budget Type 2 (Cost) (System Default: Forecasted Cost Budget)	Maps budget types to budget amounts
PA: Reporting Budget Type 3 (Revenue) (System Default: Approved Revenue Budget)	Maps budget types to budget amounts
PA: Reporting Budget Type 4 (Revenue) (System Default: Forecasted Revenue Budget)	Maps budget types to budget amounts

Financials Intelligence Concurrent Programs

Concurrent Program Name	Description
GLOSUM-Financial Item Data Collection	<p>Collects financials data for the following reports:</p> <ul style="list-style-type: none"> – Expenses - GLXOAFIR.rdf – Revenues - GLXOAFIR.rdf – Current Ratio - GLXOAFIR.rdf – Profit Margin - GLXOAFIR.rdf – Contribution Margin - GLXOAFIR.rdf – Earnings Per Share - GLXOAEPS.rdf – Top Financial Indicator - GLXOASUM.rdf
INVTURNITMS-Summarize Balances at Item Level for Open Reports	<p>Summarizes inventory balances for the following inventory reports:</p> <ul style="list-style-type: none"> – Inventory Turns by Period - INVTURNS.rdf – Inventory Turns by Organization - INVTNORG.rdf <p>Also provides the data for the Discoverer workbook: INVSCIAL.dis and its related worksheet</p>
PAXACMPT-PRC: Update Project Summary Amounts and PABISUMS-PRC: Refresh OBIS Summary Amounts	<p>Generates the data for the Project Performance Analysis (PAPERFAN.rdf) report. Note: The Refresh BIS Summary Amount process uses information created by the Update Project Summary Amount process. Therefore, you should run the Update Project Summary Amounts process first and then run the Refresh BIS Summary Amounts process.</p>

Performance Measures, Target Levels, Alerts, and Workflows

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
AR Turnover PTD	AR Turnover PTD by Operating Unit	FII: AR Turnover PTD	FII BIS Corrective Action	FII_SEND_NOTIFICATION
AR Turnover QTD	AR Turnover QTD by Operating Unit	FII: AR Turnover QTD	FII BIS Corrective Action	FII_SEND_NOTIFICATION
AR Turnover YTD	AR Turnover YTD by Operating Unit	FII: AR Turnover YTD	FII BIS Corrective Action	FII_SEND_NOTIFICATION
Days Sales Outstanding (PTD)	Days Sales Outstanding PTD by Operating Unit	FII: Days Sales Outstanding PTD	FII BIS Corrective Action	FII_SEND_NOTIFICATION
Days Sales Outstanding (QTD)	Days Sales Outstanding QTD by Operating Unit	FII: Days Sales Outstanding QTD	FII BIS Corrective Action	FII_SEND_NOTIFICATION
Days Sales Outstanding (YTD)	Days Sales Outstanding YTD by Operating Unit	FII: Days Sales Outstanding YTD	FII BIS Corrective Action	FII_SEND_NOTIFICATION

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
Weighted Average Balance PTD	Weighted Average Balance PTD by Operating Unit			
Weighted Average Balance QTD	Weighted Average Balance QTD by Operating Unit			
Weighted Average Balance YTD	Weighted Average Balance YTD by Operating Unit			
Weighted Average Days Late PTD	Weighted Average Days Late PTD by Operating Unit			
Weighted Average Days Late QTD	Weighted Average Days Late QTD by Operating Unit			
Weighted Average Days Late YTD	Weighted Average Days Late YTD by Operating Unit			
Revenue	Revenue by Organization	*BIS: GL Latest Closed Period Revenue Alert	FII: BIS Corrective Action	FII_REVENUE_NOTIFICATION
	Revenue by GL Company	*BIS: GL Previous Open Period Revenue Alert	FII: BIS Corrective Action	FII_REVENUE_NOTIFICATION
	Revenue by GL Company and GL Secondary Measure	*BIS: GL Current Period Revenue	FII: BIS Corrective Action	FII_REVENUE_NOTIFICATION

(*) New performance measure with alerts and workflows for release 11*i* only. The revenue alerts can be run with any of the revenue targets measures.

Human Resources Intelligence Setup Items

Human Resources Profile Options

None

Human Resources Intelligence Concurrent Programs

Concurrent Program Name	Description
BIS Load Organization Hierarchy Summary Table	Populates two summary tables with the organization hierarchies used by human resources reports.

Performance Measures, Target Levels, Alerts, and Workflows

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
**Manpower Separations by FTE	FTE, HR	HR Manpower		HR_SEND_
	Organization, HR Monthly	Separations by Month		NOTIFICATION
	FTE, HR	HR Manpower		HR_SEND_
	Organization, HR Quarterly	Separations by Quarter		NOTIFICATION
	FTE, HR	HR Manpower		HR_SEND_
	Organization, HR Yearly	Separations by Year		NOTIFICATION
**Manpower Separations by Headcount	FTE, HR	HR Manpower		HR_SEND_
	Organization, HR Monthly	Separations by Month		NOTIFICATION
	HC, HR	HR Manpower		HR_SEND_
	Organization, HR Quarterly	Separations by Quarterly		NOTIFICATION
	HC, HR	HR Manpower		HR_SEND_
	Organization, HR Yearly	Separations by Year		NOTIFICATION
Recruitment Success (6)	*Recruitment Success by FTE			

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
Summary Manpower Analysis	Recruitment			
	Success by Headcount*			
	*Manpower Variance by FTE			
Training Success	*Manpower Variance by Headcount			
	*Training Success			

Notes:

(6) This report was named Hours Worked Analysis in BIS 1.2.

(*) New performance measure with alerts and workflows for release 11*i* only.

(**) Existing 1.2 performance measure with alerts and workflows for both release 1.2 and 11*i*.

Operations Intelligence Setup Items

Operations Profile Options

Profile Option Name	Description
MRP: Plan Revenue Price List	Describes the price list used to calculate the revenue that is associated with a plan or forecast as part of plan performance indicators
MRP: Plan Revenue Discount Percent	Describes the discount to be applied when calculating the revenue that is associated with a plan or forecast as part of plan performance indicators

Operations Intelligence Concurrent Programs

Concurrent Program Name	Description
CSTBISLD - OBIS Margin Analysis Load Run	Provides the data for the following cost management reports: <ul style="list-style-type: none"> Gross Margin by Year - CSTMRYER.rdf Gross Margin by Product Group - CTSMRGPG.rdf Gross Margin by Sales Channel - CSTMRQTR.rdf Gross Margin by Period - CSTMRPRD.rdf Gross Margin by Assembly - CSTMRGAS.rdf
WIPVIN - Capture Production Indicators	Provides the data for the following work in process reports: <ul style="list-style-type: none"> Production Efficiency - WIPBIEFE.rdf Production Efficiency by Period - WIPBIEFO.rdf Production Efficiency by Period - WIPBEFD.rdf Production Efficiency by Department - WIOBIEFW.rdf Utilization - WIPBIUZE.rdf
	<ul style="list-style-type: none"> Utilization by Period - WIPUZO.rdf Utilization by Periods - WIPBIUZD.rdf Utilization by Department - WIPBOUZW.rdf Production Yield - WIPBIYDE.rdf Production Yield by Week - WIPBIDYDO.rdf Production Yield by Department - WIPBIYDW.rdf
WIPBPTP - Capture Production Performance	Provides the data for the following work in process reports: <ul style="list-style-type: none"> Performance to MPS - WIPBIPPE.rdf Performance to MPS by Week - WIPBIPPO.rdf Performance to MPS by Product Category - WIPBIPPW.rdf

Concurrent Program Name	Description
INVTURNS - Summarize Balances	Provides the data for the following inventory reports: Period Inventory Turns - INVTURNS.rdf
Run planning program again???	<p>Populates the following planning reports (which should be run after installing BIS and setting up the appropriate Operations profile options)</p> <ul style="list-style-type: none"> Plan Performance - MRPEPPS.rdf Organization Plan Performance - MRPEPO.rdf Plan Performance Trends - MRPEPPT.rdf Late Sales Order - MRPLSO.rdf
MRPPBIS-Populate Forecast Analysis Data	<p>Populates the summary tables that provide data for the following planning reports:</p> <ul style="list-style-type: none"> Forecast Accuracy - MRPFSEA.rdf Demand Class Accuracy - MRPDCLA.rdf Forecast Trend - MRPFSETT.rdf
QLTBISB-BIS Summary Table Builder	The nonconformance load program is used to transfer results from QA_RESULTS to QA_BIS_RESULTS. This summary table then generates the operations related nonconformance reports.

Performance Measures, Target Levels, Alerts, and Workflows

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
**Backorders by Line (1)	Backordered Line Numbers	OE Backorders		OE_BACKORDER_SEND_NOTIFICATION
**Resources Utilization (2)	Utz for Org by Prod	BIS: Utilization		WIP_SEND_NOTIFICATION
**Production per Employee	Prod per Emp Trgt for Org by Prd	BIS: Production per Employee		WIP_SEND_NOTIFICATION
**Production Efficiency	Eff Trgt for Org by Prod	BIS: Production Efficiency		WIP_SEND_NOTIFICATION
**WIP Inventory Trend		BIS: WIP Inventory Trend		WIP_SEND_NOTIFICATION
MRP Forecast Error% (!)	MRP Forecast Error% (All)			
	MRP Forecast Error% (Detail by Period)			
	MRP Forecast Error% (by Period by Organization)			
	**MRP Inventory Turns (!)	MRP Inventory Turns (All)		MRP_PLAN_PERF

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
		MRP Inventory Turns (Detail by Period across Organizations)		MRP_PLAN_PERF
		MRP Inventory Turns (Organization)		MRP_PLAN_PERF
		MRP Inventory Turns (by Periods within an Organization)		MRP_PLAN_PERF
**MRP Gross Margin% (!)	MRP Gross Margin% (All)			MRP_PLAN_PERF
	MRP Gross Margin% (Organization)			
** MRP On-Time Deliver% (!)	MRP On-Time Delivery% (All)			
	MRP On-Time Delivery% (Detail by Period across Organizations)			MRP_PLAN_PERF
	MRP On-Time Delivery% (Organization)			MRP_PLAN_PERF
	MRP On-Time Delivery% (by Period within an Organization)			MRP_PLAN_PERF
**MRP Planned Utilization% (!)	MRP Planned Utilization% (All)			MRP_PLAN_PERF
	MRP Planned Utilization% (Detail by Period across Organizations)			MRP_PLAN_PERF
	MRP Planned Utilization% (Organization)			MRP_PLAN_PERF
	MRP Planned Utilization% (by Period within an Organization)			MRP_PLAN_PERF

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
*Sales Revenue Growth%				
*Scrap%				
*Production Yield%				
*Return by Value(3)				
*On-Time Shipment by Value (4)				
*Gross Margin (5)		<ul style="list-style-type: none"> Margin by Period Margin by Quarter Margin by Year 		

Notes:

(1) This performance measure has been renamed to Resource Utilization (and comes with alerts and workflows) for BIS 11i.

(2) This performance measure was called Backorders in BIS 1.2.

(5) This performance measure was called Return Percentage in BIS 1.2.

(6) This performance measure was called On-Time Delivery in BIS 1.2.

(7) This performance measure was called On-Time Shipment Percentage in BIS 1.2.

(8) This performance measure was called On-Time Shipment in BIS 1.2.

(9) This performance measure was called Return Percentage in BIS 1.2.

(10) This performance measure was called Fill Rate in BIS 1.2.

(*) These six MRP performance measures have alerts that send notifications but do not post the actuals because of planning and functional requirements that BIS does not support at this time. Because the actuals are not posted, they do not show up on the personal homepage. This requirement is anticipated to be supported in BIS 11+.

(11) The Product Quality report includes the Production Yield report from BIS 1.2.

(12) This report is the result of merging six reports from BIS 1.2: Gross Margin by Year, Gross Margin by Quarter, Gross Margin by Period, Gross Margin by Product Group, Gross Margin by Assembly, and Gross Margin by Sales Channel.

(**) Existing 1.2 performance measure with alerts and workflows for releases 1.2 and 11i.

(***) Existing 1.2 performance measure with new alerts and workflows for release 11i.

Process Manufacturing Setup Items

Process Manufacturing Intelligence Profile Options

Profile Option Name	Description
PMI: Default UOM Conversion	Sets up the global unit of measure conversion value for all of Oracle Process Manufacturing (OPM)
PMI: Default Company All	Selects OPM related companies based on the value provided.
PMI: Default Company	Used by PMI Security to select a particular company to be used as the default OPM-related default company

Process Manufacturing Intelligence Concurrent Programs

Concurrent Program Name	Description
PMI_ONHAND_SALE_ SUMMARY - PMI Onhand Sales Summary Inventory Data Collection	Provides the data for the following process manufacturing inventory reports: <ul style="list-style-type: none"> OPM Inventory Turns - PMINVTRN.rdf OPM Onhand Inventory - PMIOHDQT.rdf
PMI_PROD_SUMMARY - PMI Production Summary/Production Data Collection	Provides the data for the following OPM production reports: <ul style="list-style-type: none"> OPM Production Yield vs. Usage - PMIYLDUS.rdf OPM Production Yield - PMIPRDYD.rdf OPM Production Usage - PMIPRDUS.rdf OPM Top Ten Products - PMIT10PR.rdf OPM Top Ten Ingredients - PMIT10US.rdf

Performance Measures, Target Levels, Alerts, and Workflows

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
OPM Inventory Measure	OPM Inventory Turns Whs/ Year	BIS: OPM Inventory Turns Whs Year	PMI BIS Corrective Action	PMI_SEND_NOTIFICATION
	OPM Inventory Turns Whs/ Quarter	BIS: OPM Inventory Turns Whs Quarter		
	OPM Inventory Turns Whs/ Month	BIS: OPM Inventory Turns Whs Month		
	OPM Inventory Turns Org/ Year	BIS: OPM Inventory Turns Org Year		
	OPM Inventory Turns Org/ Quarter	BIS: OPM Inventory Turns Org Quarter		

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
	OPM Inventory Turns Org/ Month	BIS: OPM Inventory Turns Cmp Year		
	OPM Inventory Turns Cmp/ Year	BIS: OPM Inventory Turns Cmp Quarter		
	OPM Inventory Turns Cmp/ Quarter	BIS: OPM Inventory Turns Cmp/Quarter		
	OPM Inventory Turns Cmp/ Month	BIS: OPM Inventory Turns Cmp Month		

Purchasing Setup Items

Purchasing Intelligence Profile Options

Profile Options	Description
POA: Global Security	Determines access levels to operation units

Purchasing Intelligence Concurrent Programs

Concurrent Program Name	Description
POAFTXPO - Populate Procurement Fact Tables	<p>Provides data for the following purchasing reports:</p> <ul style="list-style-type: none"> Item Purchases - POASPANA.rdf Commodity Purchases - POASPCAT.rdf Supplier Performance - POASPERF.rdf Supplier Consolidation Impact - POASPCOR.rdf Contract Savings - POASVNGS.rdf Contract Savings by Commodity - POALSCOM.rdf Contract Savings by Organization - POALSORG.rdf Contract Savings by Supplier - POALSSUP.rdf Contract Leakage Trend - POACTLKG.rdf Purchase to Sales Ratio - POASPSAL.rdf

Performance Measures, Target Levels, Alerts, and Workflows

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
OPM Inventory Measure	OPM	BIS: OPM	PMI BIS	PMI_SEND_
	Inventory	Inventory Turns	Corrective	NOTIFICATION
	Turns Whs/	Whs Year	Action	
	Year	BIS: OPM		
	OPM	Inventory Turns		
	Inventory	Whs Quarter		
	Turns Whs/	BIS: OPM		
	Quarter	Inventory Turns		
	OPM	Whs Month		
	Inventory	BIS: OPM		
	Turns Whs/	Inventory Turns		
	Month	Org Year		
	OPM	BIS: OPM		
	Inventory	Inventory Turns		
	Turns Org/	Org Quarter		
	Year	BIS: OPM		
	OPM	Inventory Turns		
	Inventory	Cmp Year		
	Turns Org/	BIS: OPM		
	Quarter	Inventory Turns		
	OPM	Cmp Quarter		
	Inventory	BIS: OPM		
	Turns Org/	Inventory Turns		
	Month	Cmp/Quarter		
	OPM	BIS: OPM		
	Inventory	Inventory Turns		
	Turns Cmp/	Cmp Month		
	Year			
	OPM			
	Inventory			
	Turns Cmp/			
	Quarter			
	OPM			
	Inventory			
	Turns Cmp/			
	Month			

Performance Measures, Target Levels, Alerts, and Workflows

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
***Purchase Sales Ratio	Monthly Purchase Sales Ratio—Ops. Unit	POA Purchase to Sales Ratio: Current Period - Ops. Unit	POA BIS Corrective Action	POA_SEND_ PURCHASE_TO_ SALES_ NOTIFICATION
		POA Purchase to Sales Ratio: Prior Period - Ops. Unit		
	Monthly Purchase Sales Ratio—All Organization	POA Purchase to Sales Ratio: Current Period - All Organization	POA BIS Corrective Action	POA_SEND_ PURCHASE_TO_ SALES_ NOTIFICATION
		POA Purchase to Sales Ratio: Prior Period - All Organization		
***Contract Leakage%	Monthly Leakage%—All Organization	POA Contract Leakage: Current Period - All Organization	POA BIS Corrective Action	POA_SEND_ CONTRACT_ LEAKAGE_ NOTIFICATION
		POA Contract Leakage: Prior Period - All Organization		

Performance Measure	Target Level	Alert Name	Workflow Name	Workflow Process
	Monthly Leakage%-- Operating Unit	POA Contract Leakage: Current Period Op. Unit	POA BIS Corrective Action	POA_SEND_CONTRACT_LEAKAGE_NOTIFICATION
			POA Contract Leakage: Prior Period-Op. Unit	
	Monthly Leakage%: Organization	POA Contract Leakage: Current Period Organization	POA BIS Corrective Action	POA_SEND_CONTRACT_LEAKAGE_NOTIFICATION
		POA Contract Leakage: Prior Period-Organization		

Notes:

- (1) These three reports, Contract Savings by Commodity, Contract Savings by Organization, and Contract Savings by Supplier, have been merged into the new Contract Savings report for BIS 11i.
- (2) The Contract Savings report has been renamed Contract Savings Summary for BIS 11i.
- (3) The Item Purchases report in BIS 1.2 has been renamed Purchases in release 11i and is the result of the merge of two BIS 1.2 reports, Item Purchase and Commodity Purchase.
- (***) Existing 1.2 performance measure with new alerts and workflows for release 11i.

Marketing Intelligence Setup Items

Marketing Intelligence Profile Options

Profile Option Name	Description
CRM BIS: Period Set Name	Used to set the calendar that will be used for reporting
CRM BIS: Period Type	Used to set the period level at which marketing data is summarized

Marketing Intelligence Concurrent Programs

Concurrent Program Name	Description
CSTBISLD - BIS Margin Analysis Load Run	Collects revenue and margin information that is used by some of the other Marketing Intelligence concurrent programs
BIM OLTP COLLECTION	Enables you to run Marketing Intelligence data collection programs collectively
<ul style="list-style-type: none"> BIM_CMPGN_PERF BIM_CUSTOMER_REV_PKG BIM_EVENT_PERF_SUMM_PKG BIM_TRGT_SGMT_PERF_PKG 	<p>Populates the following marketing summary tables related to marketing performance and acquisitions:</p> <ul style="list-style-type: none"> BIM_CMPGN_PERF_SUMM BIM_CUSTOMER_REV_SUMM BIM_EVENT_PERF_SUMM BIM_TRGT_SGMT_PERF_SUMM <p>Also provides the marketing performance and acquisition data for the following reports:</p> <ul style="list-style-type: none"> BIMTPL03.rdf and BIMTPL04.rdf <ul style="list-style-type: none"> Campaign Performance Campaign Activity Performance Marketing Channel Performance Event Performance Event Offering Performance Target Segment Performance Sales Channel Revenue Performance Product Performance

Concurrent Program Name	Description
	<ul style="list-style-type: none"> BIMTPL05.rdf and BIMTPL06.rdf <ul style="list-style-type: none"> Campaign Acquisition Reports Campaign Activity Acquisition Reports Marketing Channel Acquisition
	<ul style="list-style-type: none"> Market Segment Revenue-BIMTPL01.rdf and BIMTPL02.rdf Sales Channel Comparison-BIMTPL08.rdf and BIMTPL09.rdf Sales Channel Product Performance -BIMSCCLPP.rdf
<ul style="list-style-type: none"> BIM_CMPGN_RES_SUMM_PKG BIM_EVENT_RESP_SUMM_PKG 	<p>Populates the following summary tables for marketing response rates:</p> <ul style="list-style-type: none"> BIM_CMPGN_RESP_SUMM BIM_EVENT_RESP_SUMM <p>Also provides the marketing response rate data for the following reports:</p> <ul style="list-style-type: none"> BIMTPL05.rdf and BIMTPL06.rdf <ul style="list-style-type: none"> Campaign Response Rates Campaign Activity Response Rates Marketing Channel Response Rates Event Results Event Offering Results Target Segment Response Rates Market Segment Response Rates Source List Response Rates BIMTPL10.rdf <ul style="list-style-type: none"> Event Results Event Offering Results

Concurrent Program Name	Description
<ul style="list-style-type: none"> BIM_CMPGN_RVCST_SUMM_PKG BIM_EVNT_RVCST_SUMM_PKG BIM_SRCLIST_PROFIT_PKG 	<p>Populates the following cost and profitability summary tables:</p> <ul style="list-style-type: none"> BIM_CMPGN_REVCOST_SUMM BIM_EVENT_REVCOST_SUMM BIM_SLIST_PROFIT_SUMM <p>Also provides the cost and profitability data for the following reports:</p> <ul style="list-style-type: none"> BIMTPL01.rdf <ul style="list-style-type: none"> Campaign Costs Event Costs Event Offering Costs Market Segment Revenue - BIMTPL01.rdf and BIMTPL02.rdf BIMTPL06.rdf <ul style="list-style-type: none"> Campaign Cost Per Lead Event Cost Per Lead Event Offering Cost Per Lead Campaign Revenue - BIMTPL11.rdf BIMTPL08.rdf and BIMTPL09.rdf <ul style="list-style-type: none"> Campaign Activity Profitability Marketing Channel Profitability Source List Profitability - BIMTPL09.rdf
<ul style="list-style-type: none"> BIM_LEAD_CONV_SUMM_PKG BIM_OPPR_CYCLE_SUMM_PKG 	<p>Populates the following lead analysis and sales cycle summary tables</p> <ul style="list-style-type: none"> BIM_LEAD_CONV_SUMM BIM_OPPR_CYCLE_SUMM <p>Also provides the cost and profitability data for the following reports:</p> <ul style="list-style-type: none"> Lead Aging - BIMLEDAG.rdf Lead Conversion - BIMLEDPP.rdf BIMTPL05.rdf and BIMTPL06.rdf <ul style="list-style-type: none"> Sales Channel Sales Cycle Time Market Segment Sales Cycle Time

Glossary

Glossary

A

alert actions Describe the action that occurs after Oracle Alert runs the SQL statement.

Application tier Middle section of the three-tiered architecture that includes the Web application server, the application server, the reports server, and the Discoverer server.

Ask Oracle A context-sensitive search engine that enables you to search for intelligence reports and analysis workbooks. Context sensitive means that when you search for something you can enter a natural sentence or a grouping of words, rather than just a single term.

B

base view View that includes the foreign key column.

BIS_ACTUAL_VALUES A BIS table in which Oracle Alert posts actual values (after they have been calculated by Oracle Alert).

business views Contain the underlying data on which analysis workbooks draw their information. Business views are owned by their associated Oracle application.

Business Views Catalog Search Enables you to perform a context-sensitive search for business areas and folders.

business view generator The concurrent program used to generate business views

C

client tier The tier on which the user interacts with the application or system. The main component of the client tier for the Oracle Business Intelligence System is the Web browser.

complex folder Related to Discoverer. This type of folder maps to more than one table or view.

corrective action type Indicates the type of action that you want to occur when performance falls outside specified tolerance ranges. Corrective action types originate from Oracle Workflow.

D

database tier The tier of the multitiered architecture that includes the concurrent processing server, the administration server, and the database.

dimension Represents the property, or properties, by which you want to view a performance measure. For example, Organization, Geography, and Time are all dimensions.

dimension level Sublevels of dimensions. For example, area, country, and region are dimension levels of the Geography dimension.

E

End User Layer (EUL) The place where Oracle Discoverer stores the business information for the various intelligence areas. Contains business area folders and their items, as well as the relationships between the folders.

event alert Alerts that occur as soon as an update is made to the database.

extensible hyperlinks Enable you to customize the “Related Information” section of a report.

F

folders Related to Discoverer. Similar to tables. Folders map to database tables or views.

full view View that includes the foreign key column and any other columns that help to better define the foreign key. Full views are said to “resolve” the foreign key.

fully generated view A full view in which the flexfield tags have been replaced with the actual column name for the flexfield.

G

general preferences A customization option of the personal homepage that enables you to set up the display name on the PHP, as well as information, such as the date format, and so on.

I

ICX The system prefix associated with Oracle Self Service Web Applications.

intelligence reports Predefined reports for intelligence areas. You access these reports from the personal homepage. Intelligence reports are created with the Oracle Reports product.

items Individual contents of a folder that map to columns in a table.

J

joins Represent relationship between Discoverer folders.

L

logical data model Provides the source from which views are developed.

lookup types Lists of values that you can define with workflows. You can also define lookup types in Oracle Applications.

M

metadata Data about data. For example, metadata includes the data types for attributes or columns.

N

navigate region Contains the intelligence areas and application menus to which you can link from the personal homepage.

P

PARAMPAGE icon Located in the report page banner. This icon enables you to access the parameters page for the current report.

parameter passing The concept that enables report parameters from one report be passed to another report that uses the same parameters.

periodic alert An alert that occurs at the times that you specify.

PHP Personal homepage. The BIS user interface.

performance measures (1) Business metrics that enable you to set specific goals for a particular business area and then measure actual results against predefined targets. (2) Represent the formulas that are associated with a business metric.

process type Indicates the specific type of process that will be triggered based on the corrective action type selected.

R

report parameters Reporting options that you select that determine report output. Typical report parameters include reporting date or period and organization.

role Indicates the responsibility to which the send notification is routed.

S

simple folder Related to a Discoverer business area. This type of folder maps to a single view or table.

T

targets Represent the goal against which an actual value is compared.

target levels The definitional structure of a target. Target levels specify the dimension level, access responsibility, and corrective action information related to a target.

three-tiered architecture A computing model comprising three levels: the client tier, the application tier, and the database tier. Each tier serves a separate purpose and enables large, complex systems to be

managed more efficiently by separating key components of the system into their respective tiers.

tolerance level Represents the high and low ranges to which an actual value is compared. Part of the target definition.

W

Workflow (Oracle) An Oracle product that enables you to define and automate business processes.

workflow attributes Similar to global variables that can be referred to or updated by any activity within a workflow process.

workflow function Perform fully automated steps in the workflow process. Functions call PL/SQL stored procedures or external programs.

workflow item type Contains all of the components that you use to define the workflow process.

workflow message A workflow component that includes the message text that is sent by the workflow notification.

workflow notification Component of a workflow that you use to route messages to one or more people.

workflow process A series of actions taken to manage a document or transaction to achieve a desired results. A workflow process is represented by a workflow diagram.

worklist Displays notifications about business metrics that fall outside specified tolerance ranges.

