Overview of Oracle Process Manufacturing Intelligence, Release 11i

Student Guide

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Preface

Profile

Prerequisites

- There are no prerequisites for this course.

How This Course Is Organized

Overview of Oracle Process Manufacturing Intelligence, Release 11i is an instructor-led course featuring lecture and hands-on exercises. Online demonstrations and written practice sessions reinforce the concepts and skills introduced.

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Related Publications

Additional Publications

- System release bulletins
- Installation and user's guides
- *read.me* files
- *Oracle Magazine*

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Typographic Conventions

Typographic Conventions in Text

Convention	Element	Example
Bold italic	Glossary term (if there is a glossary)	The ***algorithm*** inserts the new key.
Caps and lowercase	Buttons, check boxes, triggers, windows	Click the Executable button. Select the Can't Delete Card check box. Assign a When-Validate-Item trigger to the ORD block. Open the Master Schedule window.
Courier new, case sensitive (default is lowercase)	Code output, directory names, filenames, passwords, pathnames, URLs, user input, usernames	Code output: `debug.set ('I", 300);` Directory: `bin` (DOS), `$FMHOME` (UNIX) Filename: Locate the `init.ora` file. Password: User `tiger` as your password. Pathname: Open `c:\my_docs\projects` URL: Go to `http://www.oracle.com` User input: Enter `300` Username: Log on as `scott`
Initial cap	Graphics labels (unless the term is a proper noun)	Customer address (*but* Oracle Payables)
Italic	Emphasized words and phrases, titles of books and courses, variables	Do *not* save changes to the database. For further information, see *Oracle7 Server SQL Language Reference Manual.* Enter `user_id@us.oracle.com`, where *user_id* is the name of the user.
Quotation marks	Interface elements with long names that have only initial caps; lesson and chapter titles in cross-references	Select "Include a reusable module component" and click Finish. This subject is covered in Unit II, Lesson 3, "Working with Objects."
Uppercase	SQL column names, commands, functions, schemas, table names	Use the SELECT command to view information stored in the LAST_NAME column of the EMP table.

Convention	Element	Example
Arrow	Menu paths	Select File–> Save.

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Brackets	Key names	Press [Enter].
Commas	Key sequences	Press and release keys one at a time: [Alternate], [F], [D]
Plus signs	Key combinations	Press and hold these keys simultaneously: [Ctrl]+[Alt]+[Del]

Typographic Conventions in Code

Convention	Element	Example
Caps and lowercase	Oracle Forms triggers	`When-Validate-Item`
Lowercase	Column names, table names	`SELECT last_name FROM s_emp;`
	Passwords	`DROP USER scott IDENTIFIED BY tiger;`
	PL/SQL objects	`OG_ACTIVATE_LAYER (OG_GET_LAYER ('prod_pie_layer'))`
Lowercase italic	Syntax variables	`CREATE ROLE role`
Uppercase	SQL commands and functions	`SELECT userid FROM emp;`

Typographic Conventions in Navigation Paths

This course uses simplified navigation paths, such as the following example, to direct you through Oracle Applications.

(N) Invoice > Entry > Invoice Batches Summary (M) Query > Find (B) Approve

This simplified path translates to the following:

1. (N) From the Navigator window, select Invoice > Entry > Invoice Batches Summary.
2. (M) From the menu, select Query > Find.
3. (B) Click the Approve button.

Notations :

(N) = Navigator

(M) = Menu

(T) = Tab

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(I) = Icon

(H) = Hyperlink

(B) = Button

Typographical Conventions in Help System Paths

This course uses a “navigation path” convention to represent actions you perform to find pertinent information in the Oracle Applications Help System.

The following help navigation path, for example—

(Help) General Ledger > Journals > Enter Journals

—represents the following sequence of actions:

1. In the navigation frame of the help system window, expand the General Ledger entry.

2. Under the General Ledger entry, expand Journals.

3. Under Journals, select Enter Journals.

4. Review the Enter Journals topic that appears in the document frame of the help system window.

Getting Help

Oracle Applications provides you with a complete online help facility.

Whenever you need assistance, simply choose an item from the Help menu to pinpoint the type of information you want.

To display help for a current window:

1. Choose Window Help from the Help menu, click the Help button on the toolbar, or hold down the Control key and type 'h'.

   A web browser window appears, containing search and navigation frames on the left, and a frame that displays help documents on the right.

   The document frame provides information on the window containing the cursor. The navigation frame displays the top-level topics for your responsibility, arranged in a tree control.

2. If the document frame contains a list of topics associated with the window, click on a topic of interest to display more detailed information.

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3. You can navigate to other topics of interest in the help system, or choose Close from your web browser's File menu to close help.

Searching for Help

You can perform a search to find the Oracle Applications help information you want. Simply enter your query in the text field located in the top-left frame of the browser window when viewing help, then click the adjacent Find button.

A list of titles, ranked by relevance and linked to the documents in question, is returned from your search in the right-hand document frame. Click on whichever title seems to best answer your needs to display the complete document in this frame. If the document doesn't fully answer your questions, use your browser's Back button to return to the list of titles and try another.

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Course Introduction

Chapter 1

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Course Introduction

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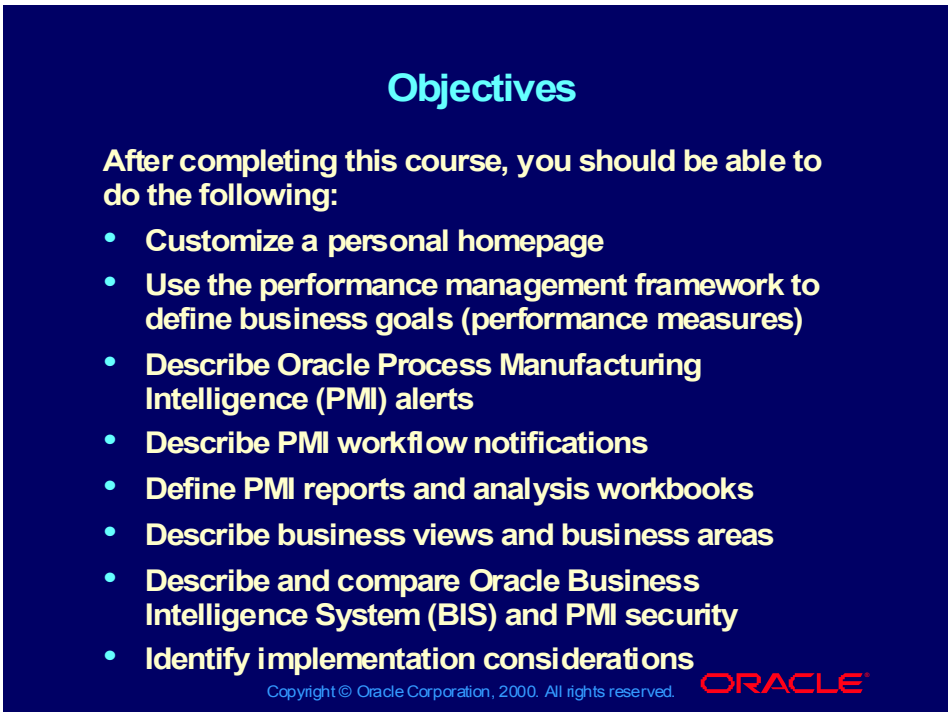
Objectives



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Course Overview

Chapter 2

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Personal Homepage

Chapter 3

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Personal Homepage

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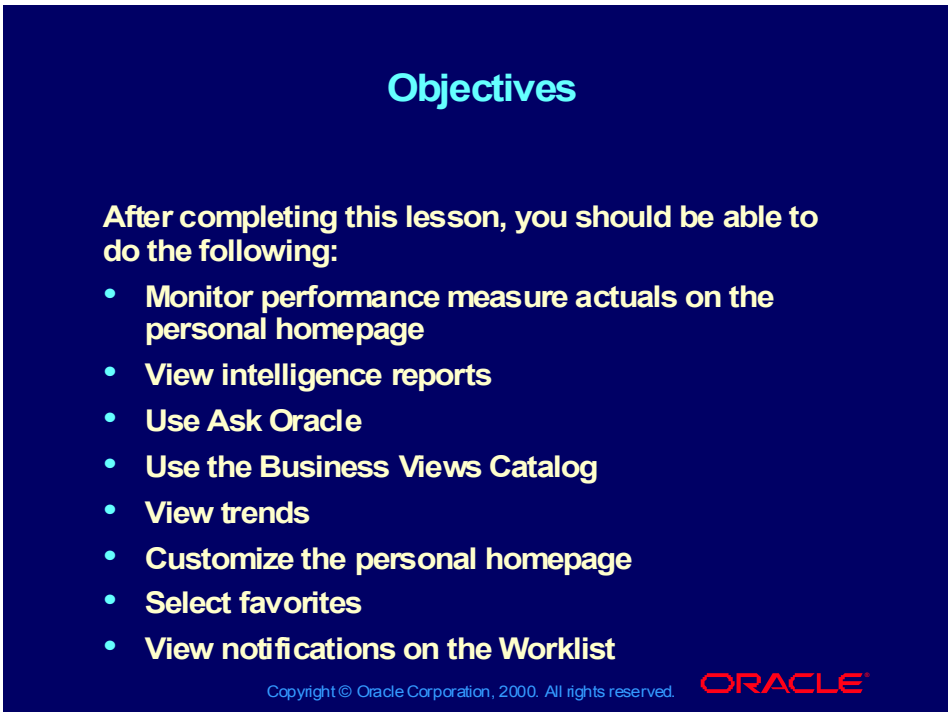

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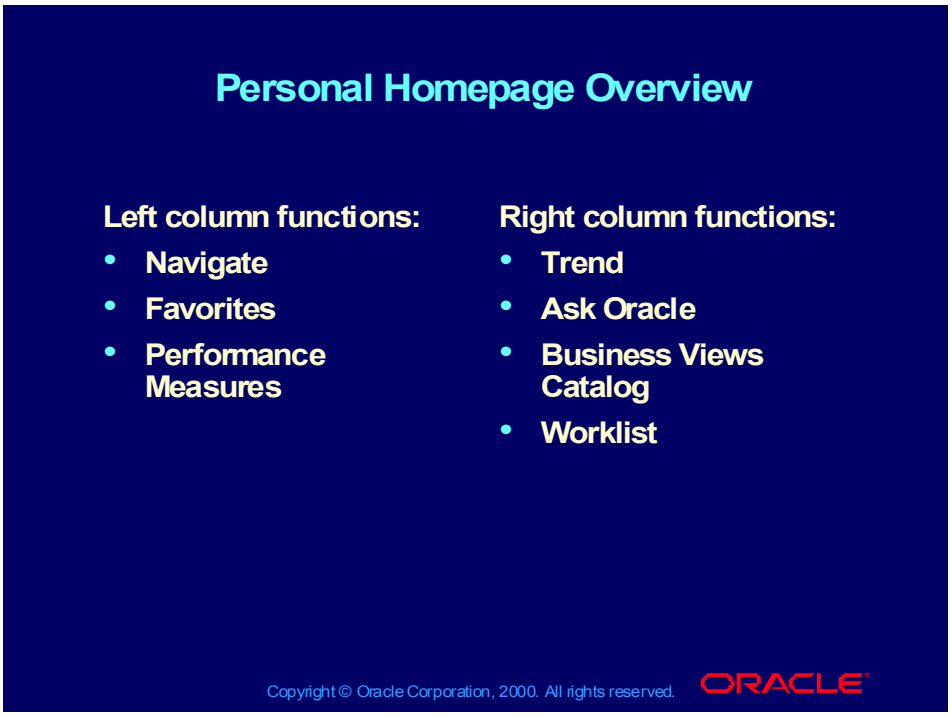

Overview

The personal homepage (PHP) represents the BIS user interface and is where users interact with the system. The PHP is the Web-based, user friendly portal to BIS that contains one default tabbed page, called the Main Menu, and can contain additional user-defined tabbed pages. Every user has a personalized homepage where that user's personal and confidential information resides.

The personal homepage is laid out in two columns. There are areas in the columns called *regions*. You can specify the types of regions that you want displayed on your homepage as well as the placement of the region within each column.

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Personal Homepage Icons

The personal homepage contains the following icons:

- Help: Provides help on the PHP
- Create and Modify Pages: Opens the Maintain Pages window, which you use to create and customize the tabbed pages that appear on the PHP
- Exit: Exits BIS

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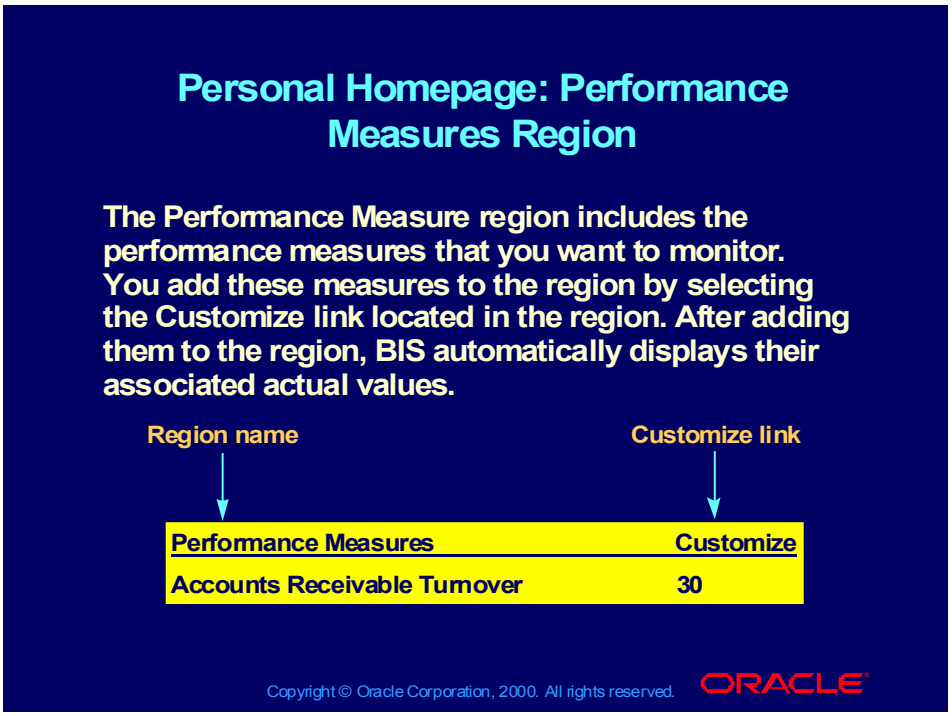

Using the Performance Measures Region

You can monitor items of ongoing interest and personal accountability. The Performance Measures region displays your progress toward defined business goals. It shows the defined intelligence areas where you can find your business information. The different display colors for the measures have different meanings:

- Red indicates that the actual value of your business objective is outside the defined tolerance values.
- Green means that the actual value is within the range of the defined minimum and maximum tolerances.
- Black means that no minimum and maximum values have been specified for the target, or that no target has been specified for the period during which the performance measurement actual was posted.

Authorized users define business goals that are stored in the performance management framework. They represent current performance objectives for the overall enterprise or a specific business unit. If the performance deviates from acceptable defined targets, then notifications are sent to the manager. If you want to customize this area, you can select from the full collection of enterprisewide performance measures.

You will learn how to select and monitor performance measures for your personal homepage in the performance management framework lesson.

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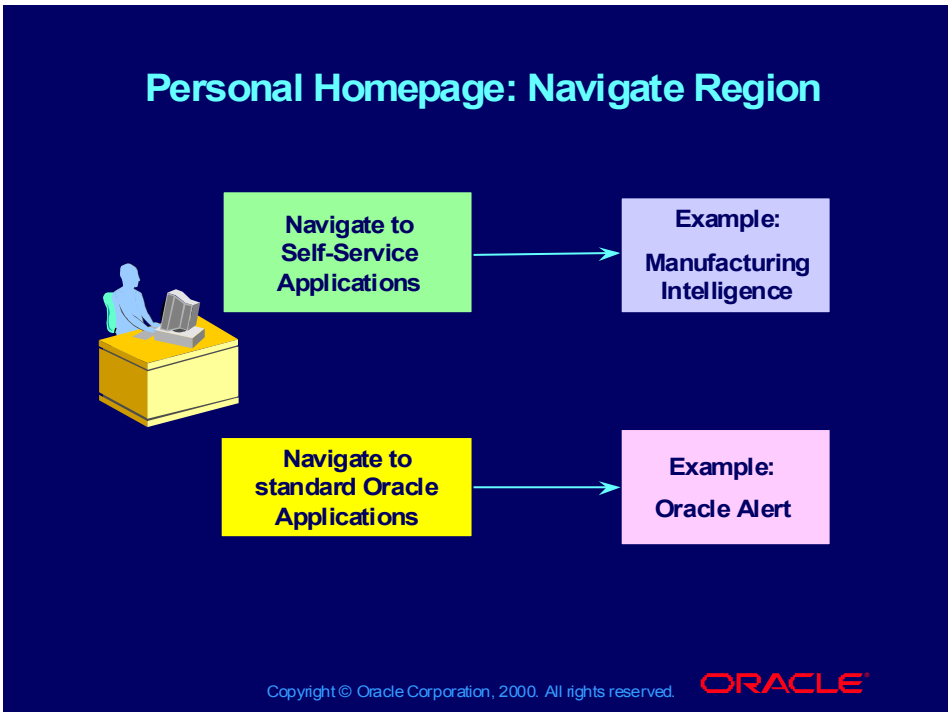

Using the Navigate Region

The Navigate region lists intelligence areas. These areas link the user to intelligence focus areas. There are several intelligence areas:

- Financials Intelligence
- Human Resources Intelligence
- Operations Intelligence
- Performance Management Framework
- Manufacturing Intelligence
- Purchasing Intelligence
- Workflow

You can select reports associated with the intelligence area and view them.

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Using the Favorites Region

You can place your favorite reports in the Favorites region. You can also place other favorite Web destinations in this region, such as news services, corporate intranet sites, or other links to systems that you use.

Click the underlined text to navigate to that area, report, or link.

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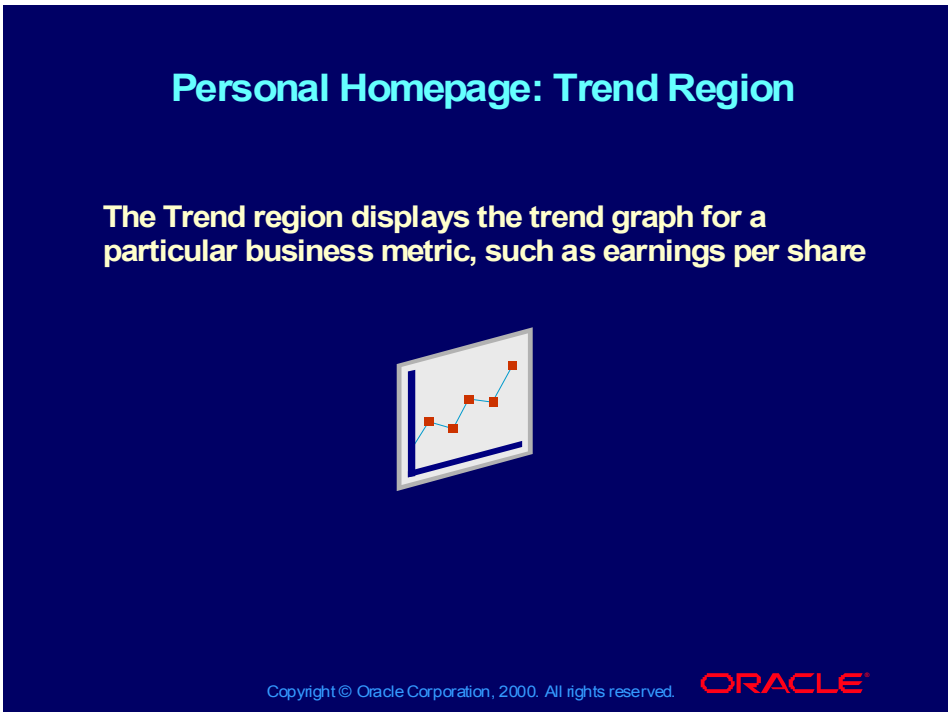

Using the Trend Region

You can view trends of particular interest to your business in the Trend region. You can also drill down into the detail of each graph simply by clicking it. The graph brings you to the corresponding report. You can personalize your homepage to include as many graphs as you like.

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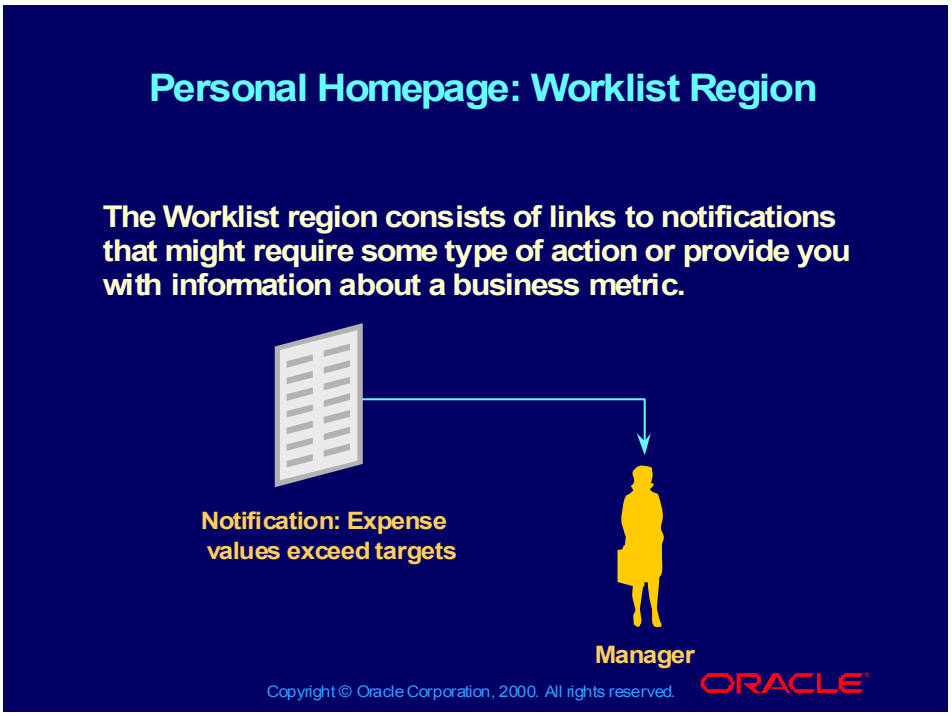

Using the Worklist (Preferences) Region

The Worklist region includes notifications that are of interest to you. Each message is date stamped and has a priority that is set by Oracle Workflow. You can modify the personal homepage to view certain priorities in this region.

The notifications are sent by Oracle Workflow. Click the underlined notification to view the message and respond as necessary.

For an example, refer to Requisition/PO Approval.

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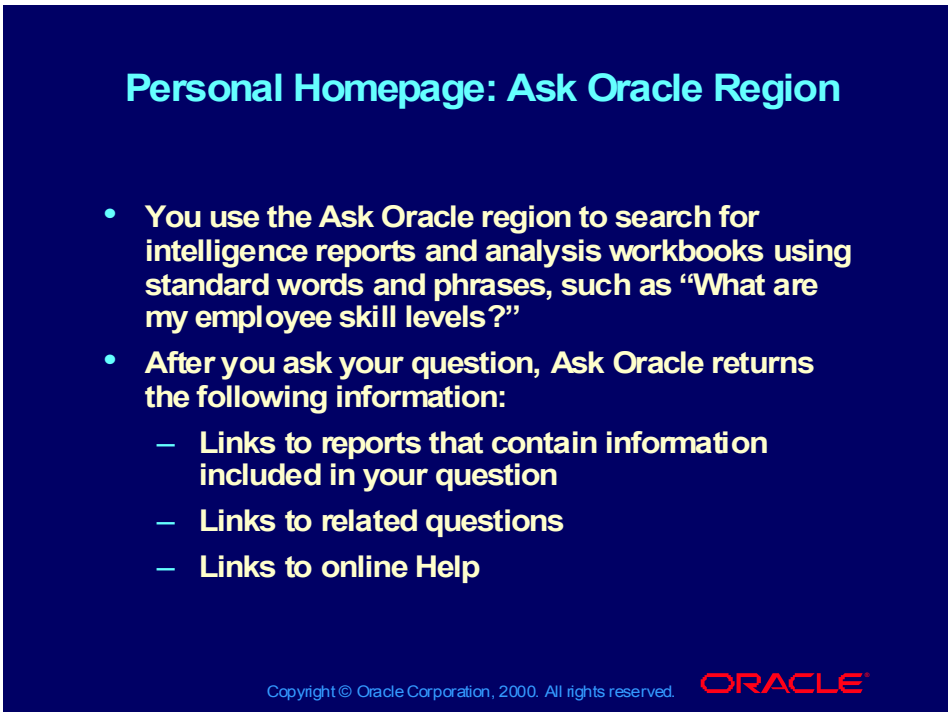

Using Ask Oracle

Using Ask Oracle, you can search for reports of interest to you. An important decision-making dynamic is to consider related subjects while reviewing specific facts. The Oracle Business Intelligence System presents information from a complete enterprisewide perspective on an up-to-date basis without causing staff to spend time filtering the data and preparing reports.

Enter keywords or questions in the Ask Oracle text box and click the Ask Oracle button. A list of reports and business questions that meet your criteria are displayed.

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Using the Business Views Catalog

With the Business Views Catalog, you can search for business views of interest to you. Enter keywords in the Business Views Catalog text field and click the Search Views button. A list of business folders and business areas with descriptions that meet your criteria are displayed.

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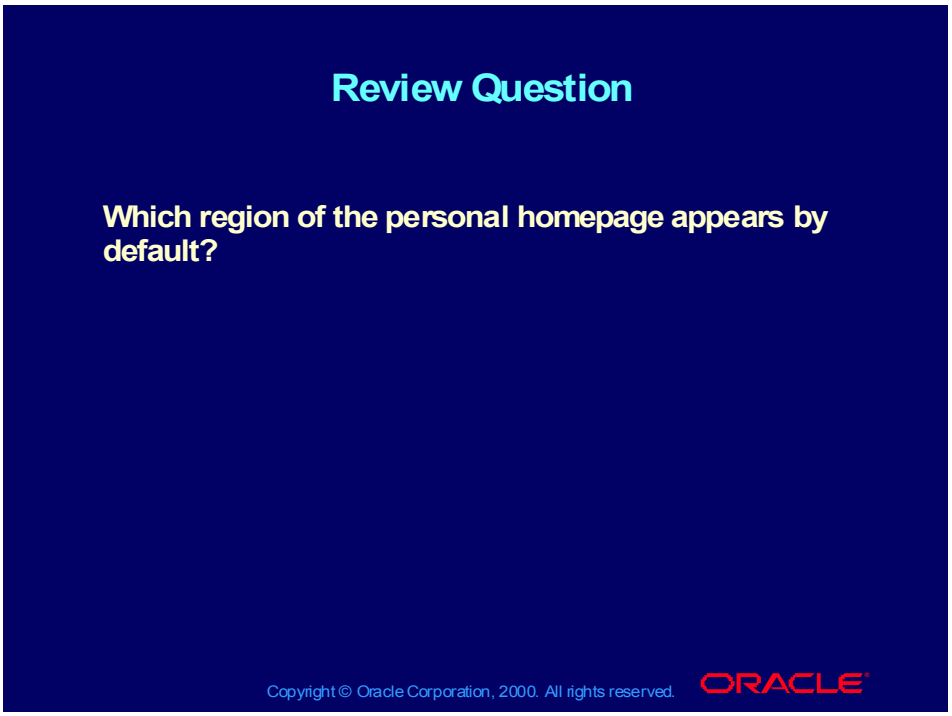

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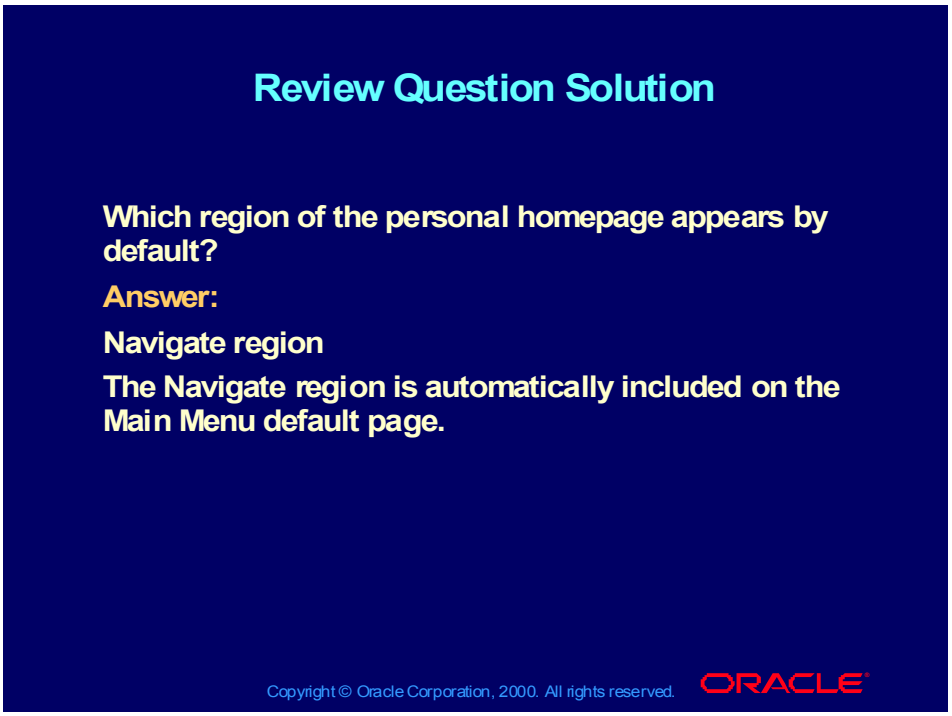

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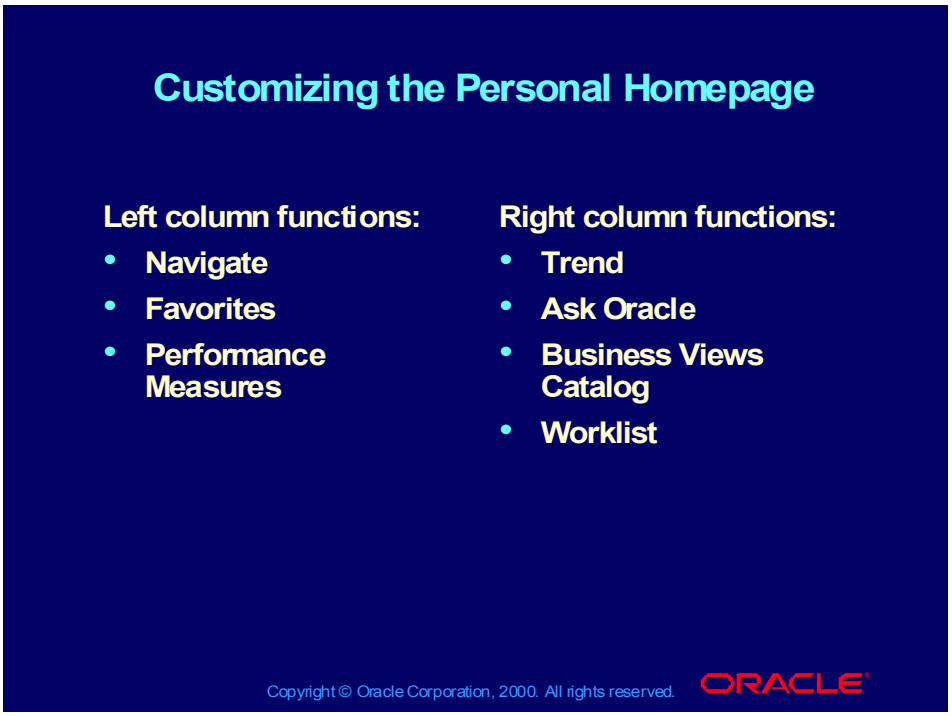

Customizing the Personal Homepage

Customizing Columns

You can configure your homepage by selecting regions for each column. Each region that you select appears on the homepage. The above slide shows the two columns of regions that you can select to customize your homepage.

Click Customize This Homepage on your homepage, and the Customize Page window appears.

Customizing Colors

Choose a color scheme for your homepage by selecting one of the choices in the Colors region.

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Customizing the Personal Homepage (continued)

Automatic Refresh

To refresh your screen, click the drop-down arrow for the Automatic Refresh list to select the frequency for refreshing your homepage.

The refresh options are:

- Never
- Every 30 minutes
- Every hour
- Every 2 hours

This affects the display and updating of your Indicator and Worklist region entries.

Note: Automatic Refresh could also affect your trends that are displayed.

Customizing Favorites

To customize the Favorites region, click Customize on the title bar of the Favorites region. This opens the Favorites window, where you can select what to display in the Favorites region on your homepage.

Customizing the Worklist

The Worklist region displays your Web notifications. You can customize the way your list appears. It can include the date due, the date sent, the subject, and the notification type. Optionally, you can restrict specified notifications from being added to your list.

Customizing Trend

To change your Trend region, select a responsibility associated with the type of graph that you want to display. Then select a graph to display in the Trend list and click OK.

Your new graph is displayed. To see the corresponding report, click the graph.

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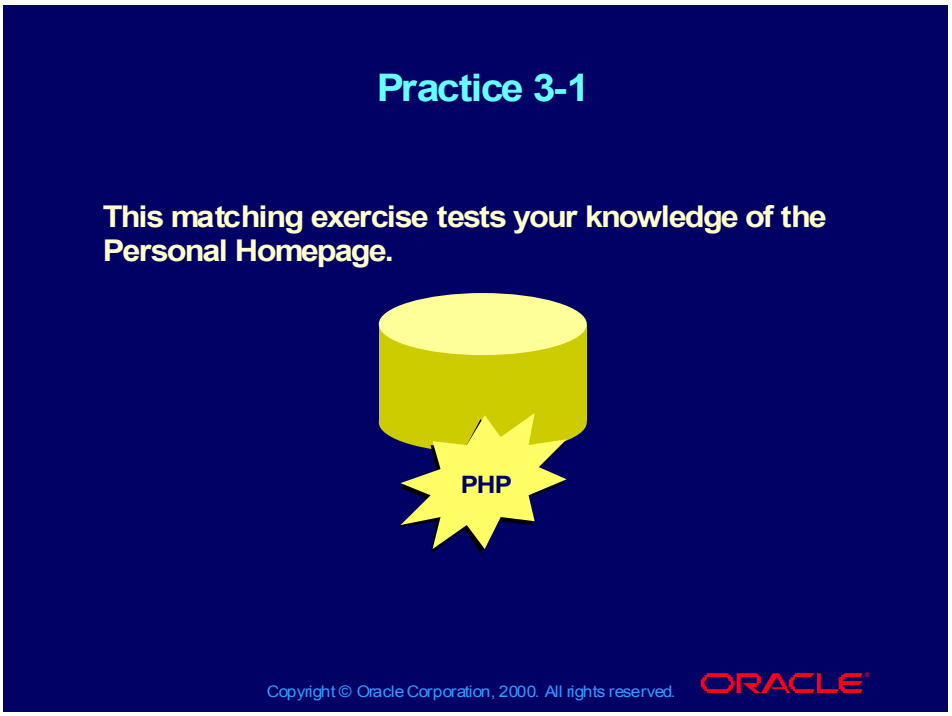

Practice 3-1

Match the regions on the personal homepage and their functions.

____	Indicators	a.	You can view the defined intelligence areas that contain business information.
____	Favorites	b.	You can enter business questions or do a keyword search and find reports that match.
____	Navigate	c.	You can define how you would like your notifications to be displayed.
____	Trend	d.	This is an area you define for personal links to business information or applications.
____	Business Views Catalogue	e.	You can view graphs of business trends.
____	Worklist	f.	You can search for business folders and areas.
____	Ask Oracle	g.	You can view your progress toward your defined business goals.

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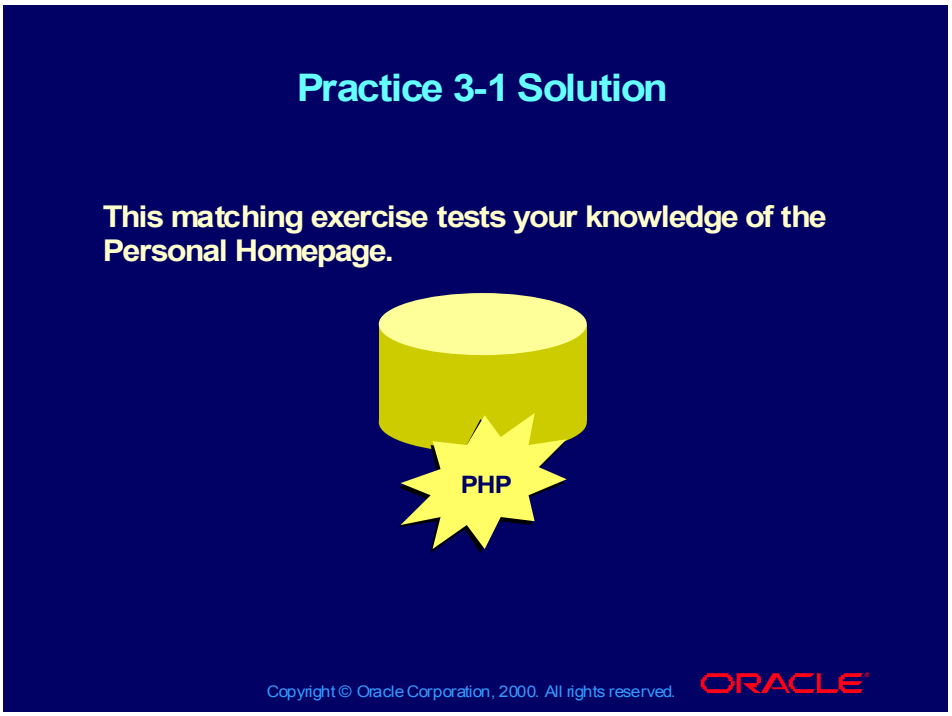

Practice 3-1 Solutions

Match the regions on the personal homepage and their functions.

__g__	Indicators	a. You can view the defined intelligence areas that contain business information.
__d__	Favorites	b. You can enter business questions or do a keyword search and find reports that match.
__a__	Navigate	c. You can define how you would like your notifications to be displayed.
__e__	Trend	d. This is an area you define for personal links to business information or applications.
__f__	Business Views Catalogues	e. You can view graphs of business trends.
__c__	Worklist	f. You can search for business folders and areas.
__b__	Ask Oracle	g. You can view your progress toward your defined business goals.

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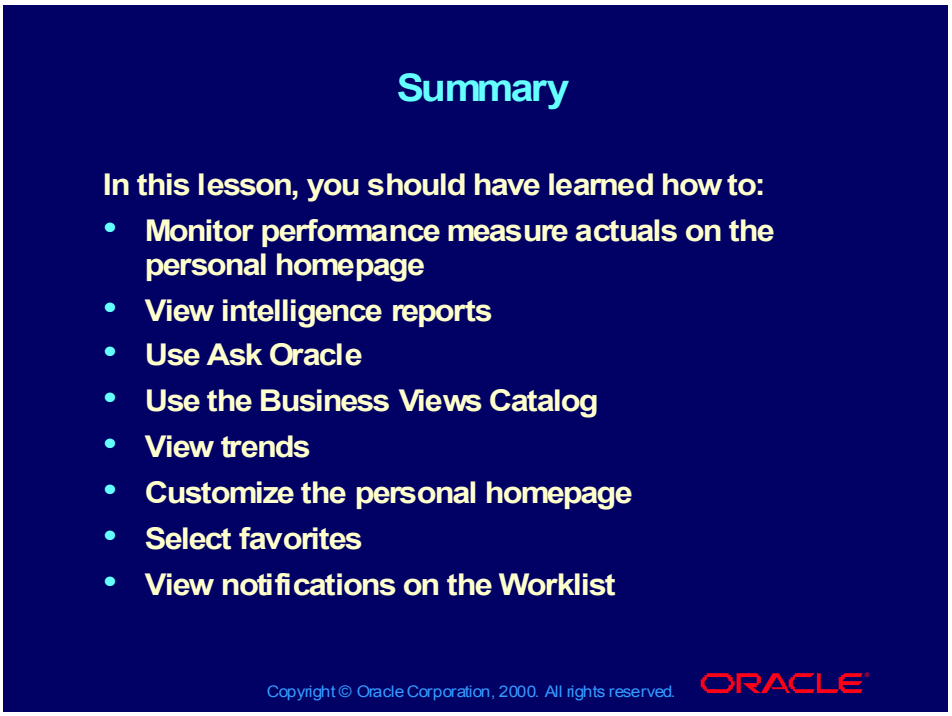

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Performance Management Framework

Chapter 4

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Performance Management Framework

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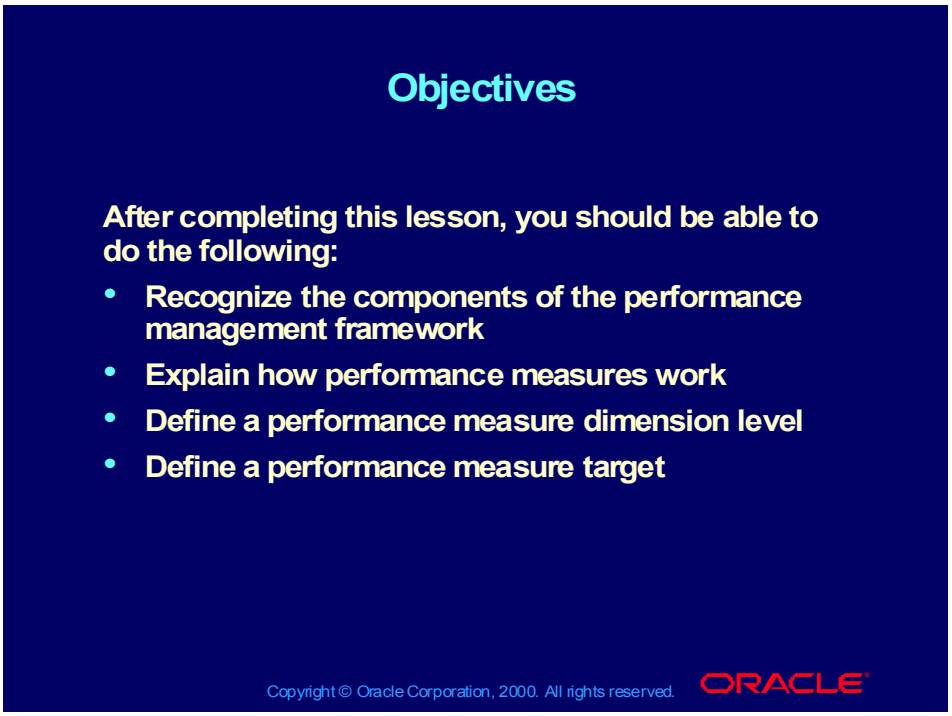

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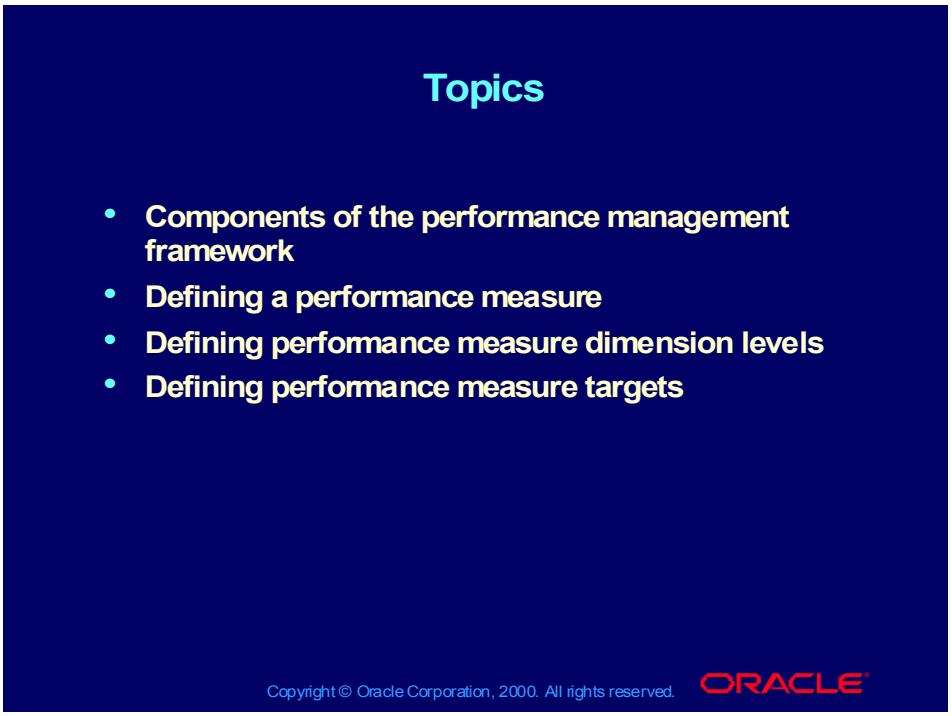

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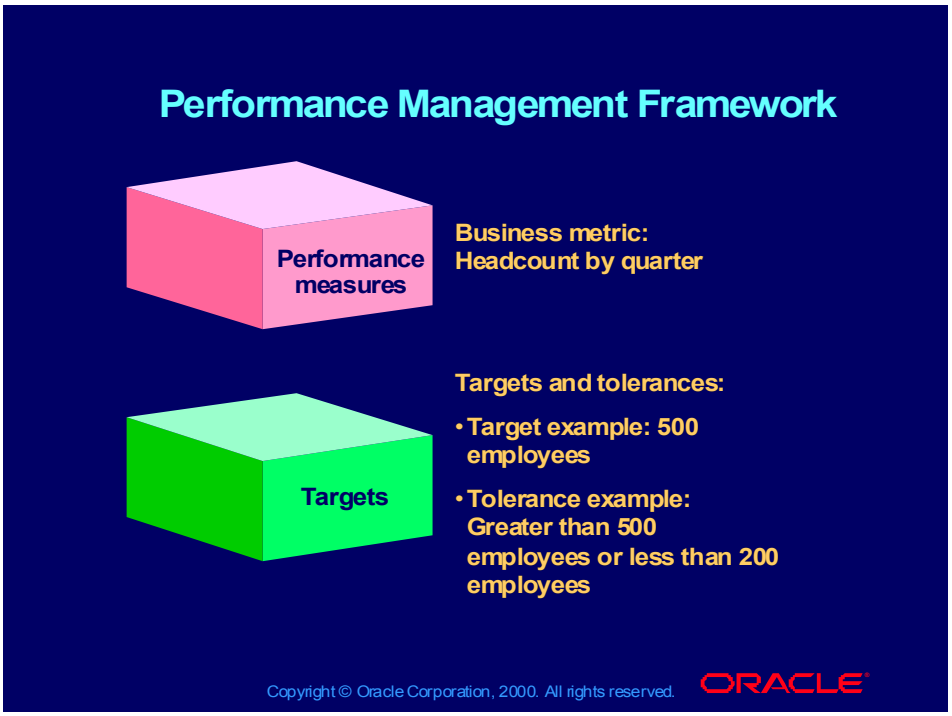

Performance Management Framework

You use the performance management framework (PMF) to set up performance measures, targets, and tolerance levels for a specific business metric, and then measure actual performance against these targets and tolerance levels.

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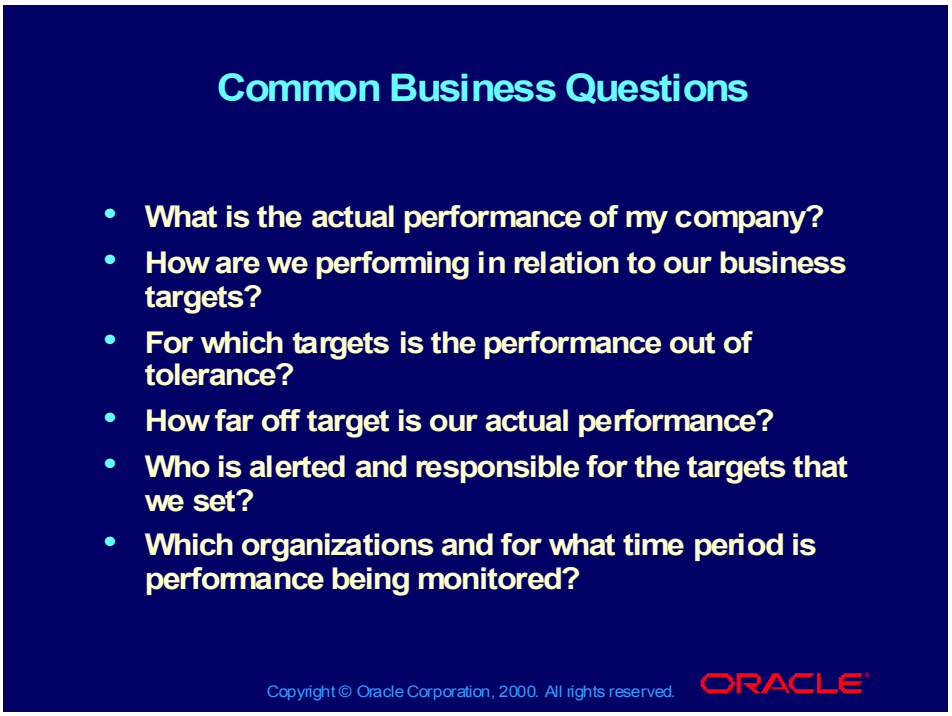

What Performance Measures Are Used For

Performance measures are the heart of the reporting and exception management framework. You define performance measures to help answer business questions. Performance measures are used in the following ways:

- Assigning a value for a business goal
- Querying on the current actual value from Oracle Applications
- Detecting a violation of the business goal value with the current value and taking action

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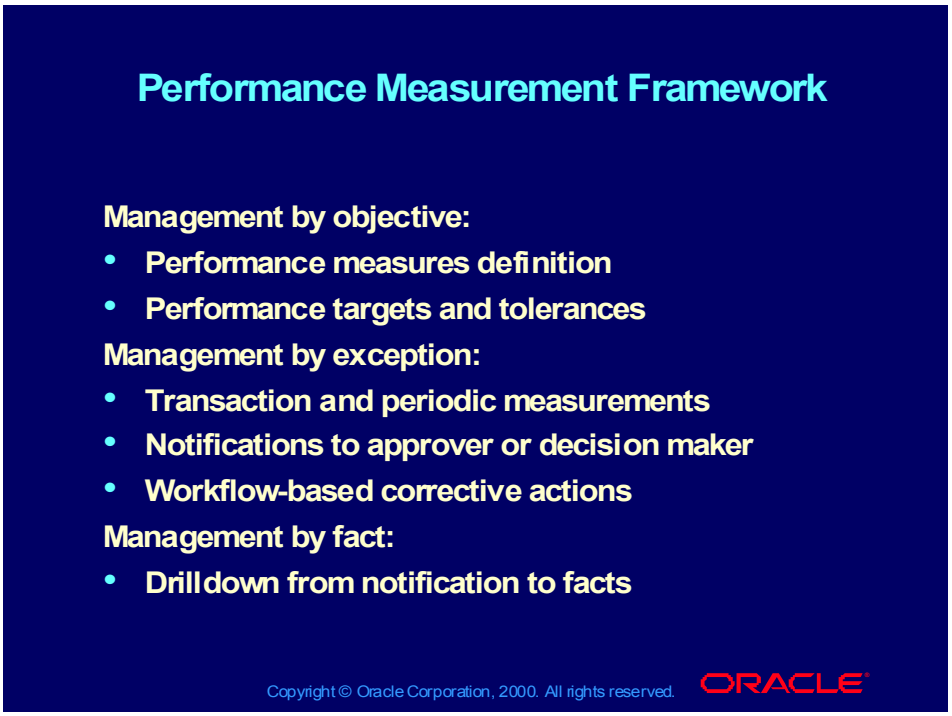

Performance Measures on the Personal Homepage

The performance management framework can bring performance information to every user's personal homepage in a secure manner. System administrators control the security of information by assigning performance measures to responsibilities within their enterprise. Users can then customize their personal homepages to monitor the performance measure actuals for organizations.

Users customizing their personal homepages can choose from performance measures and organizations assigned to them to monitor performance measure actuals.

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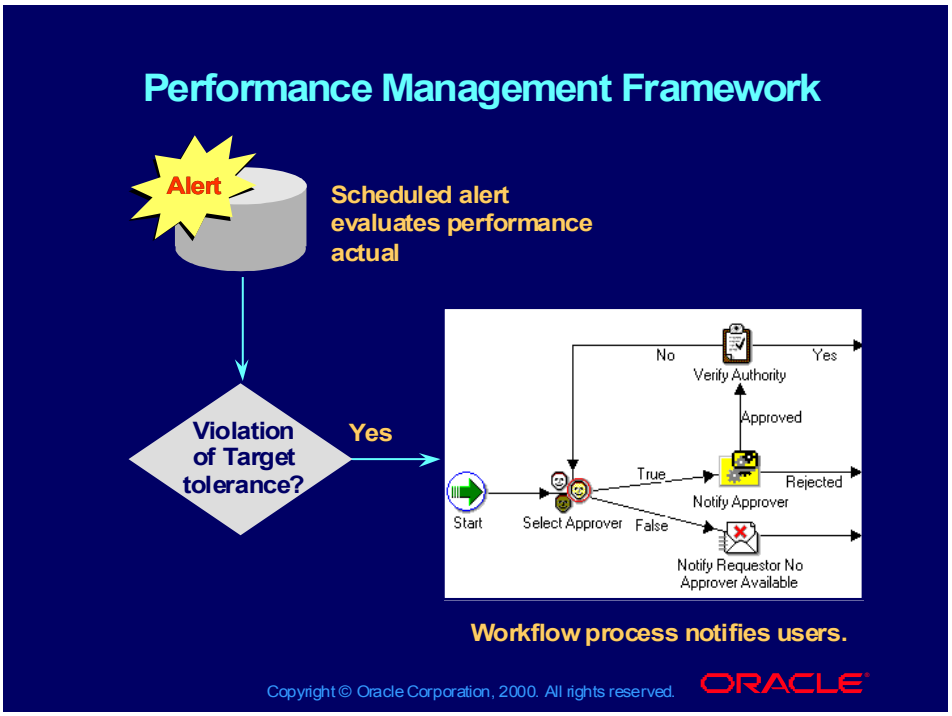

How the Performance Management Framework Works

The PMF alerts users so that they can act on important information. Authorized users define performance measures and performance measure targets in the performance management framework. If actual performance deviates from the defined ranges of the performance measure targets, the performance management framework, through Oracle Alert and Oracle Workflow, automatically notifies users of the targets and the deviations.

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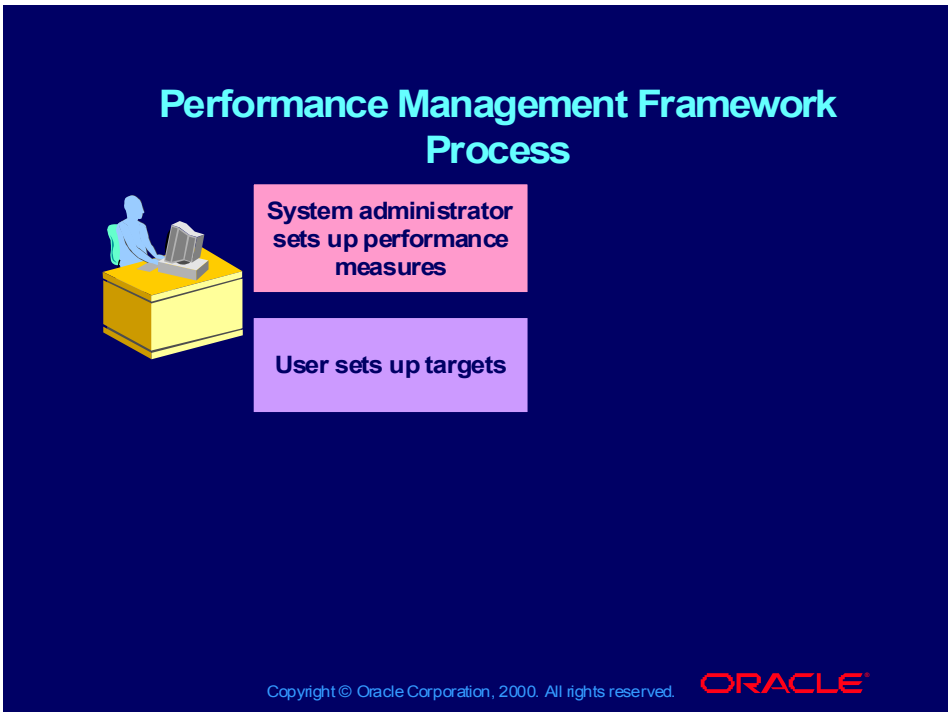

PMF Process

You use PMF to set up performance measures, targets, and tolerance levels for a specific business metric, and then measure actual performance against these targets and tolerance levels.

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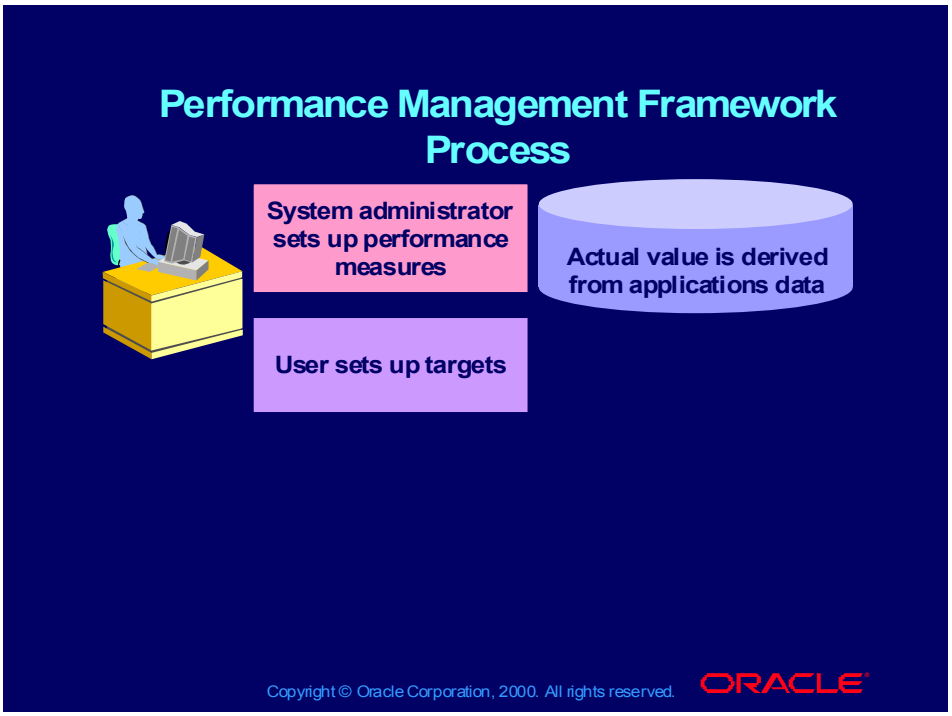

PMF Process (continued)

The target represents the value that you want the business metric to meet. The actual value associated with the business metric is calculated from data that exists in the Oracle Applications tables.

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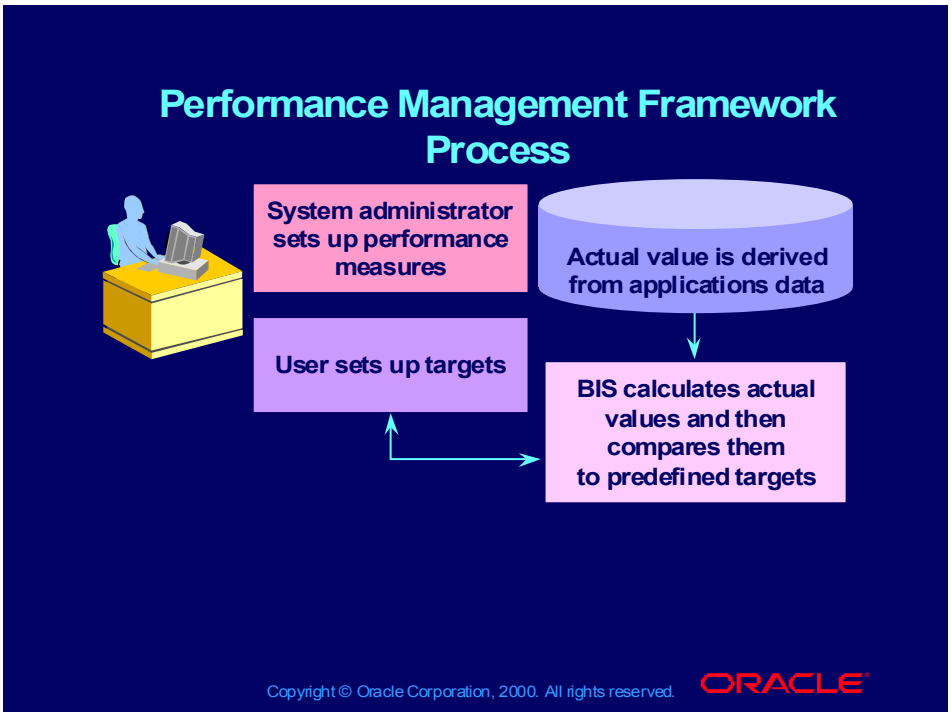

PMF Process (continued)

After BIS calculates (through Oracle Alert) the actual values it compares them to the predefined targets.

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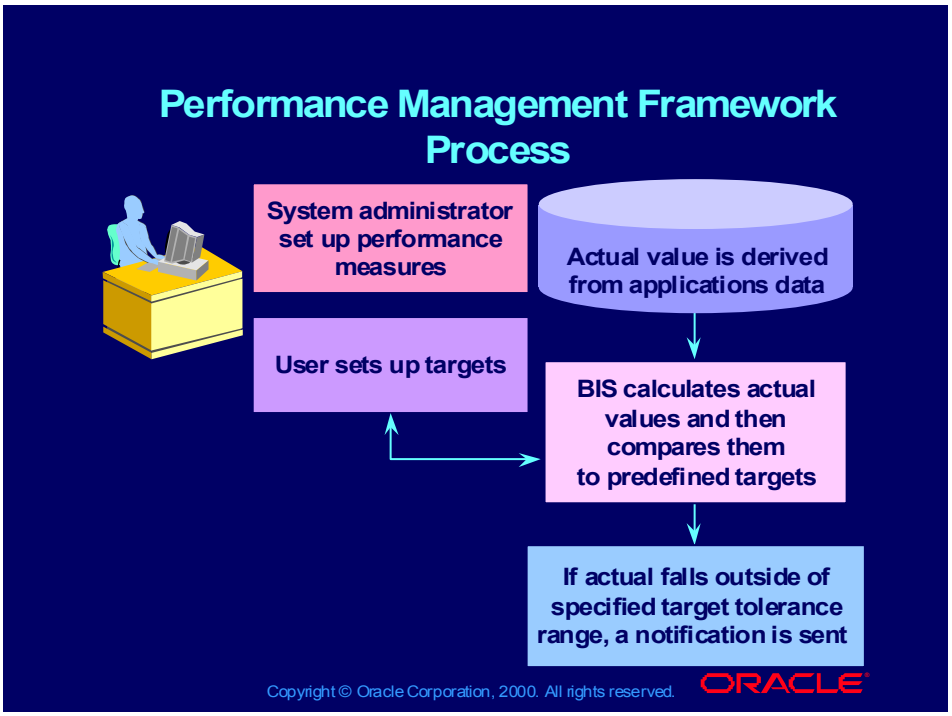

PMF Process (continued)

If the actual values falls outside specified target tolerance ranges, then a notification is sent to the responsible party.

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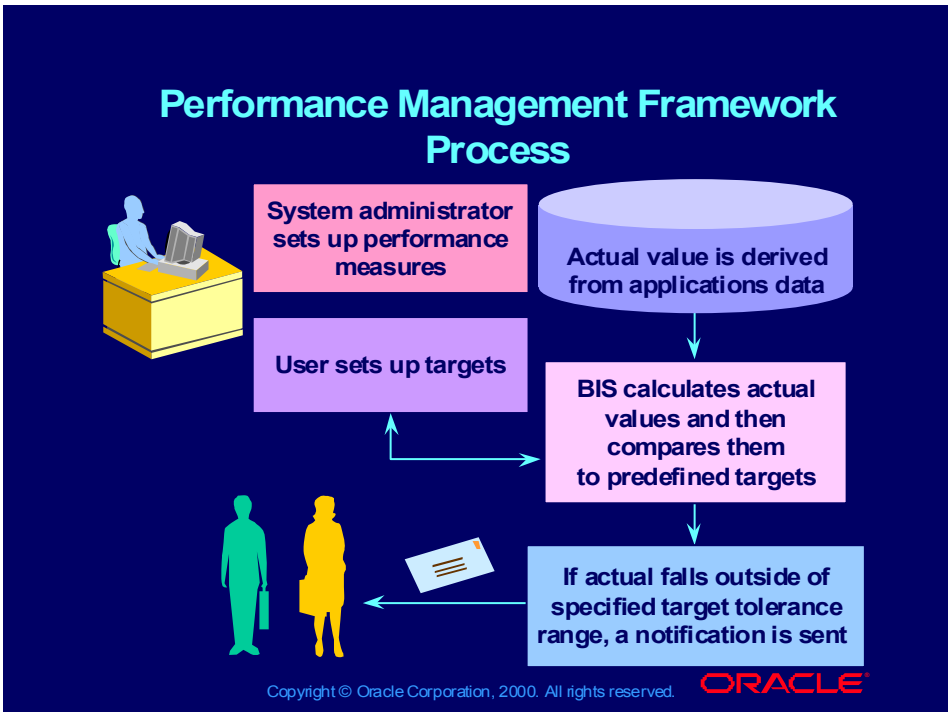

PMF Process (continued)

such as a department manager or managers.

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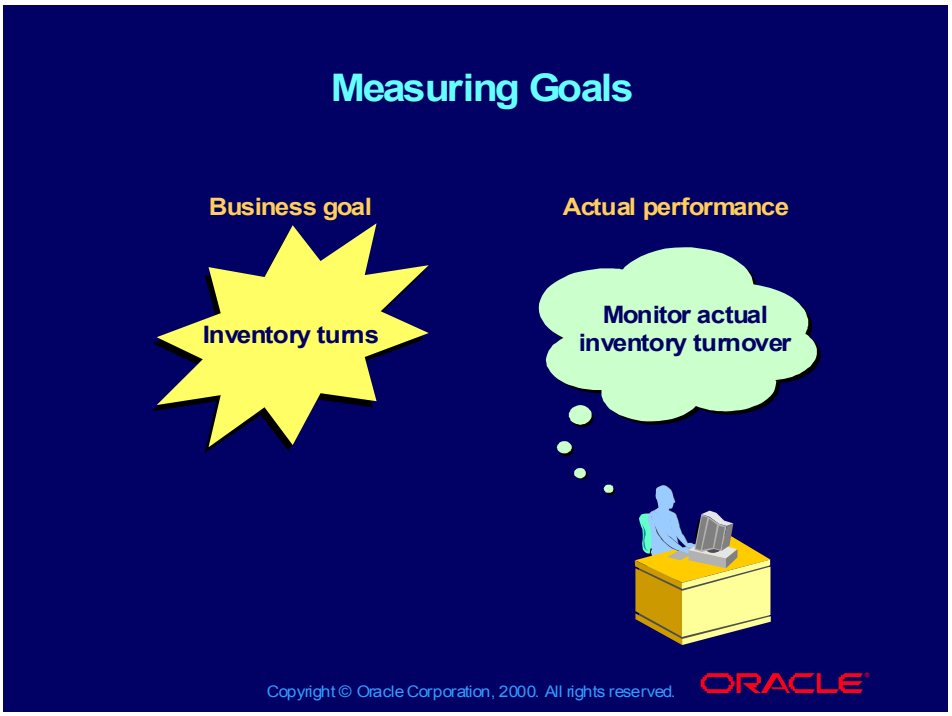

Measuring Goals

Measuring Performance

Performance measures help you clearly define your business goals.

Performance Measure

A performance measure is a business goal that is defined. The goal is defined in dimension levels for the performance measure. For example, a business goal can be defined for inventory turns.

Performance Measure Actual

A performance measure actual is the real value from the Oracle Applications transactional system. Calculations for the actual are done by an Oracle alert.

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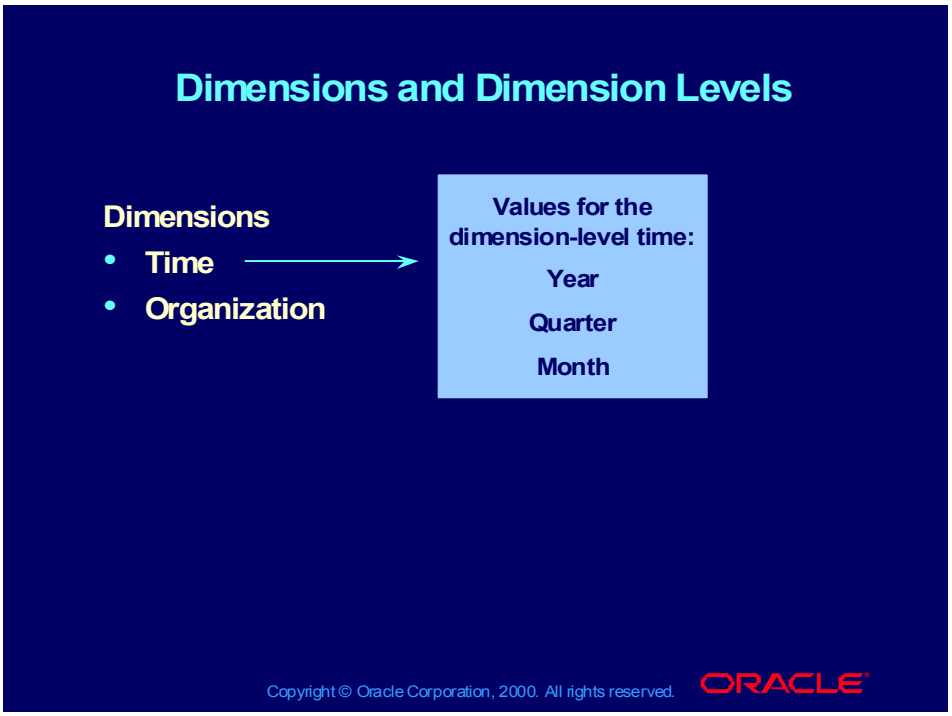

Dimensions

When you are defining business goals, you need to define what is to be measured and how it is to be measured. A dimension is a property of the business goal that is measured, calculated, or monitored. The dimensions in Process Manufacturing Intelligence, Release 11*i* are time and organization. A dimension level is an index of a property. The slide shows an example of some dimension levels for the dimension of time.

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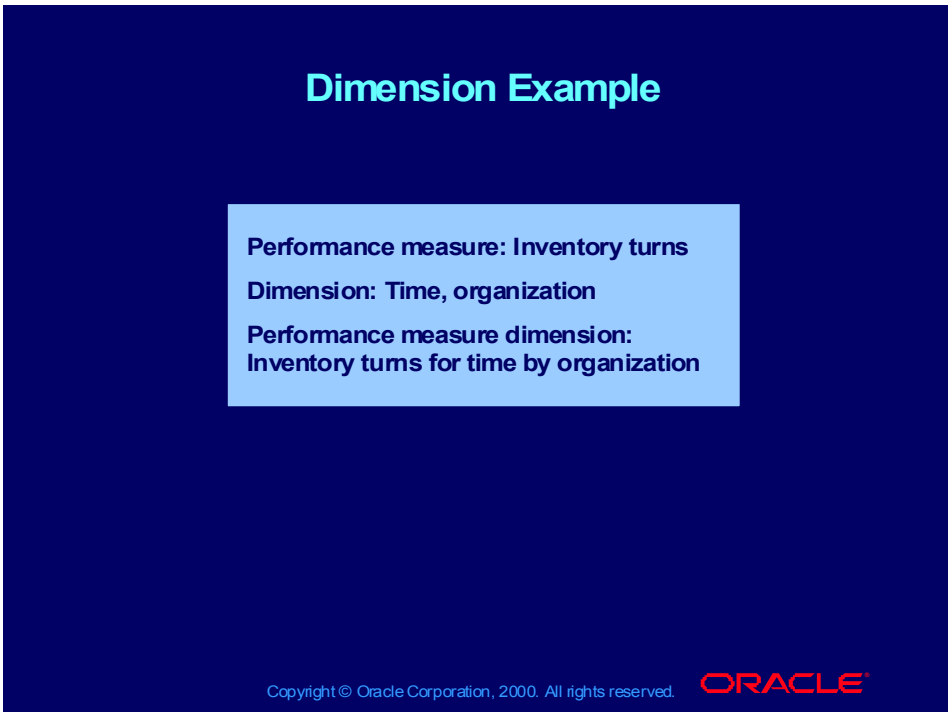

Performance Measure Dimensions

A performance measure dimension is a property that is used to define a specific business goal. Dimensions for a performance measure are selected from the superset of PMI Release 11*i* dimensions time and organization. Dimensions help you define how you measure your business goals. The two dimensions called *time* and *organization* are required, and these are shown in the example in the slide.

Now the performance measure defines a business goal called inventory turns for time by organization.

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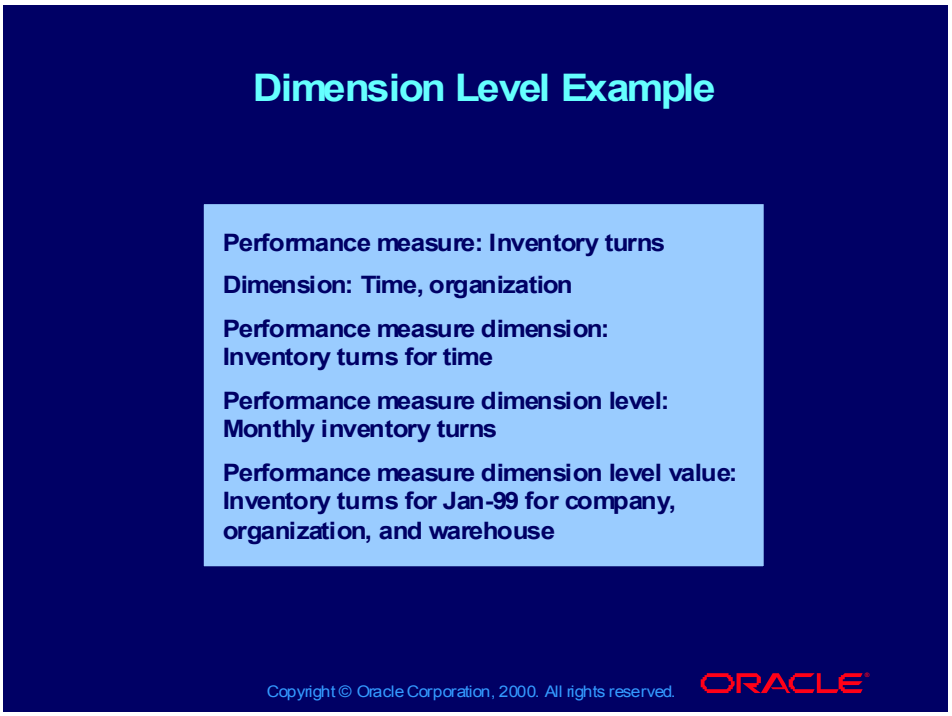
Dimension Level Example



Performance Measure Dimension Levels

The slide shows a performance measure that defines a business goal for inventory turns of a company, organization, and warehouse by month.

A performance measure dimension level is an index of a property (dimension) that defines a performance measure (business goal). Levels for a performance measure dimension are selected from the superset of PMI Release 11*i* dimension levels (company, organization, and warehouse are valid dimension levels).

You assign values to the performance measure dimension level, such as a specific month or organization name.

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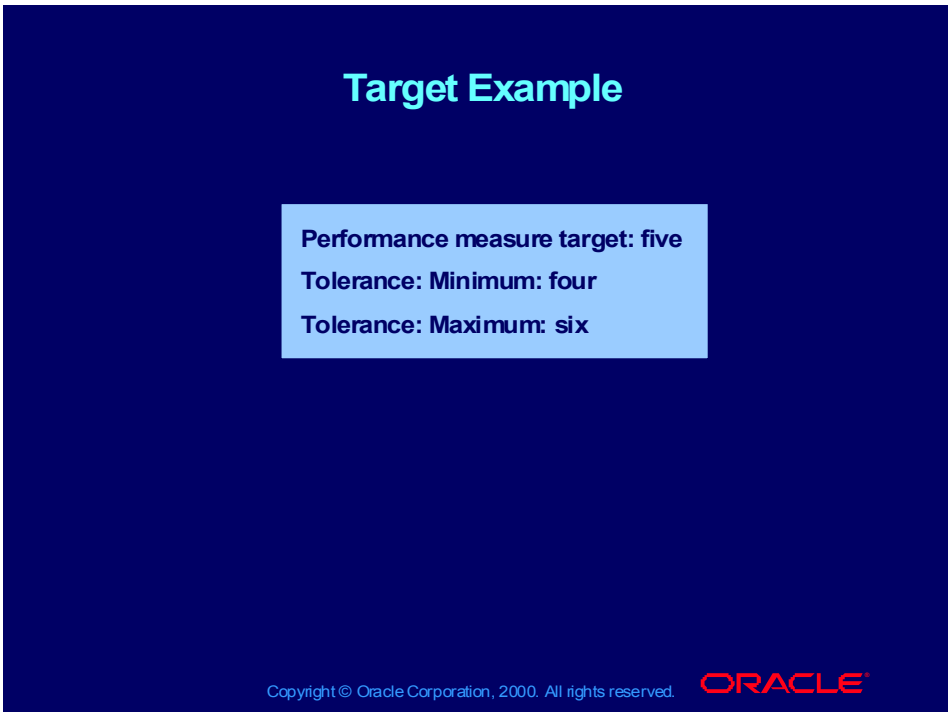

Performance Measure Targets and Their Tolerances

The next step is to assign an acceptable numerical value for this business goal.

A performance measure target is a numerical value assigned as a goal for a performance measure. A performance measure target can also have a tolerance assigned. A minimum and a maximum value can be assigned to offer a range of acceptable values in addition to an exact match of the target to the actual.

In the example above, performance measure now defines a business goal to attain a value of five for Inventory Turns for Jan-99 with an acceptable range of four to six.

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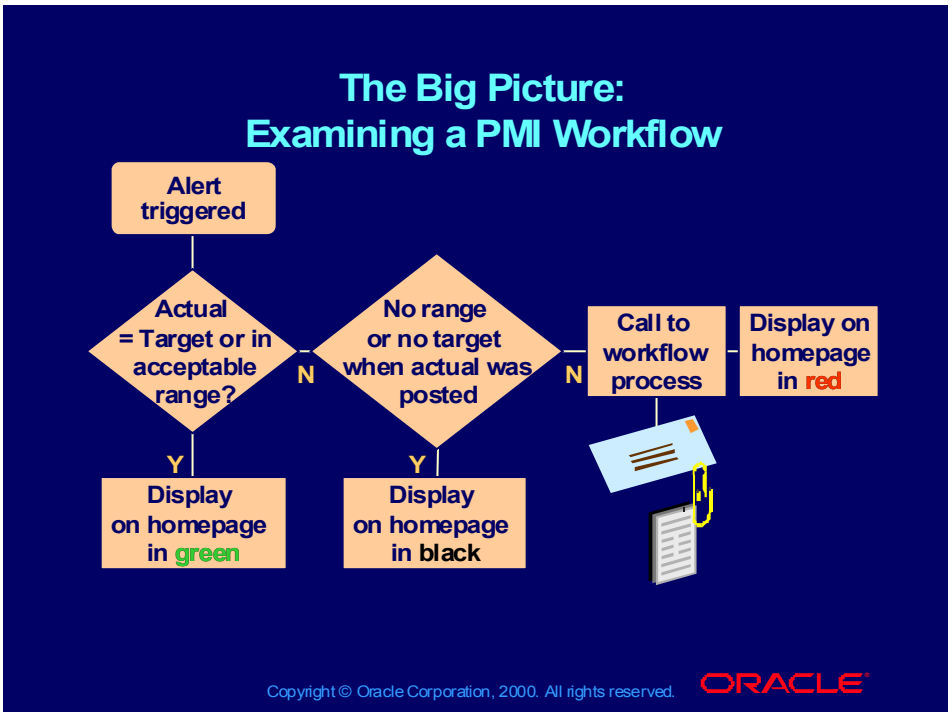
The Big Picture: Examining a PMI Workflow



Processes

The Oracle Applications–specific workflow processes are:

- MRP Plan Corrective Actions
- WIP Generic Notification
- HR Generic Notification
- OE Backorders Notification
- PMI Inventory Turns Notification

They receive information from the performance management framework.

Note: The call to the workflow process is a notification displayed in the Worklist region.

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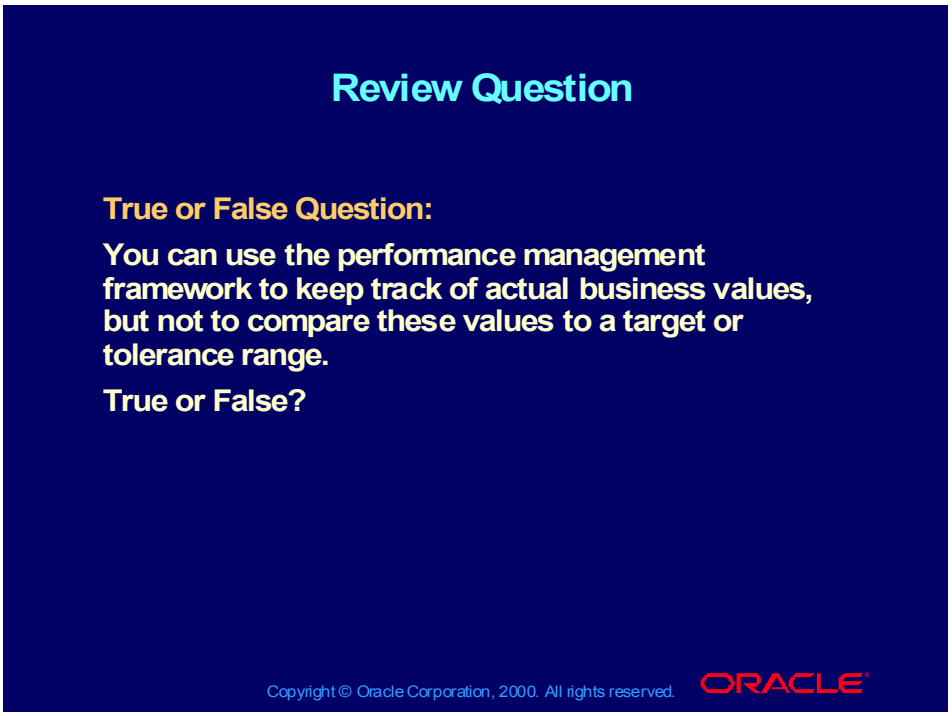

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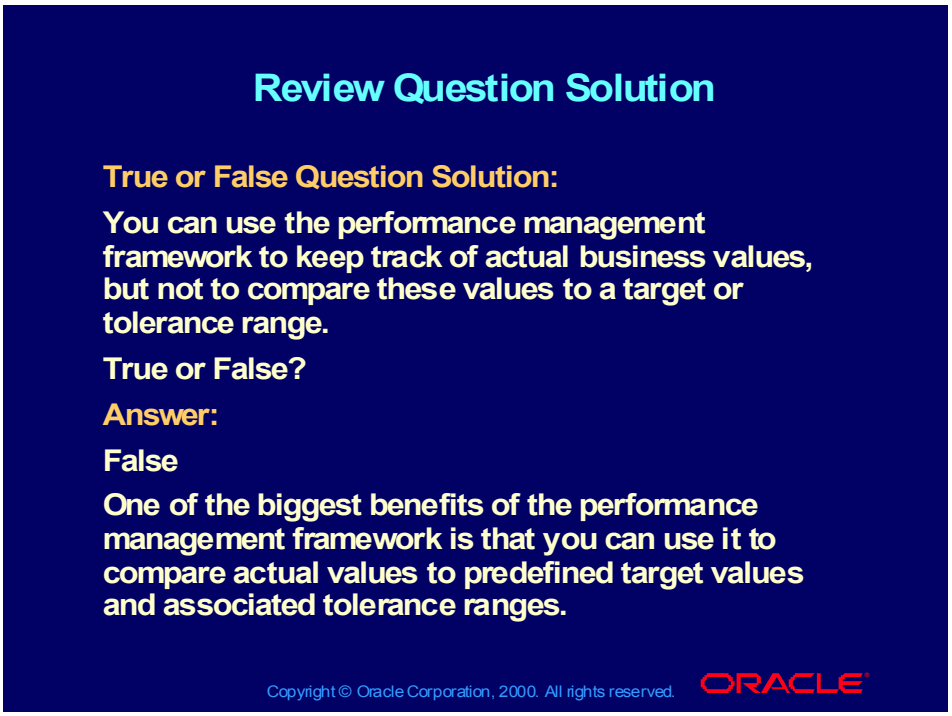

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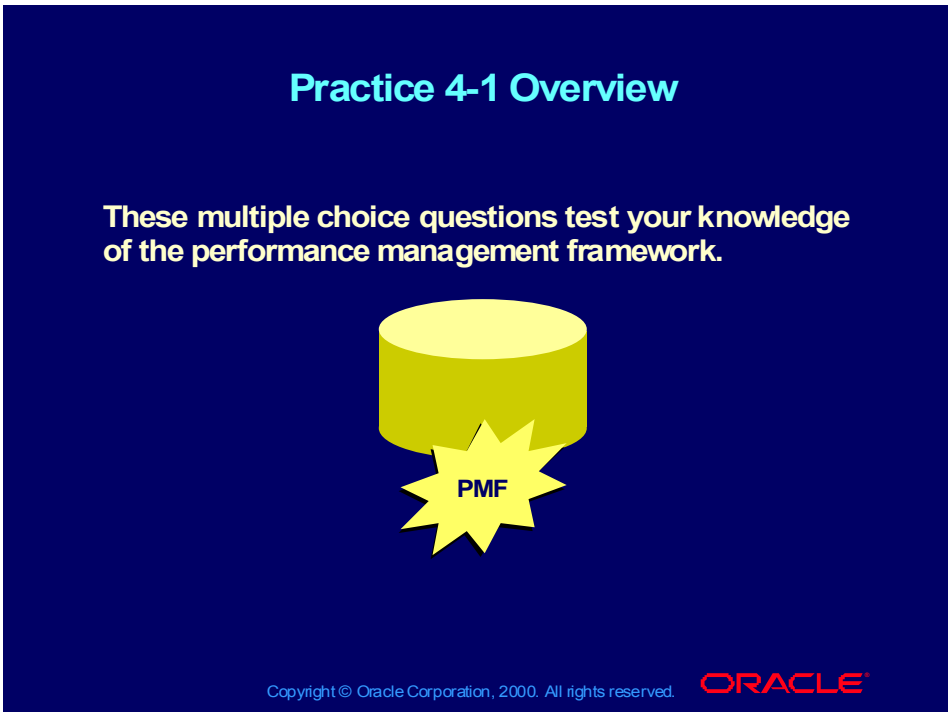
Practice 4-1 Overview



Practice 4-1

Multiple Choice Questions

1 A performance measure is:

a An interface used to measure the performance of the applications

b A component of Oracle Applications that runs concurrent requests

c A business goal that is identified in levels

d A workflow-driven procedure used to identify key performers

2 A performance measure dimension level:

a Tells the system how much data to analyze

b Defines how you want to measure your business goals

c Describes your business goals

d Defines how you want your measurements to display in workflow

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Practice 4-1 (continued)

3 A performance measure target is:

a Used to describe business goals in terms of minimum, maximum, and exact match

b Used to describe system performance goals in terms of minimum, maximum, and exact match

c Actual values from the Oracle Applications transactional system

d An Oracle alert that finds a target that you define

4 A performance measure actual is:

a A business goal that is defined in levels

b An actual system performance statistic

c Used to determine the performance measure dimension level

d A real value from the Oracle Applications transactional system

5 To customize a performance measure dimension level:

a Define the layers and then add the values

b Define the month and organization

c Select a value for time and organization

d Select a value for time, organization, and unit

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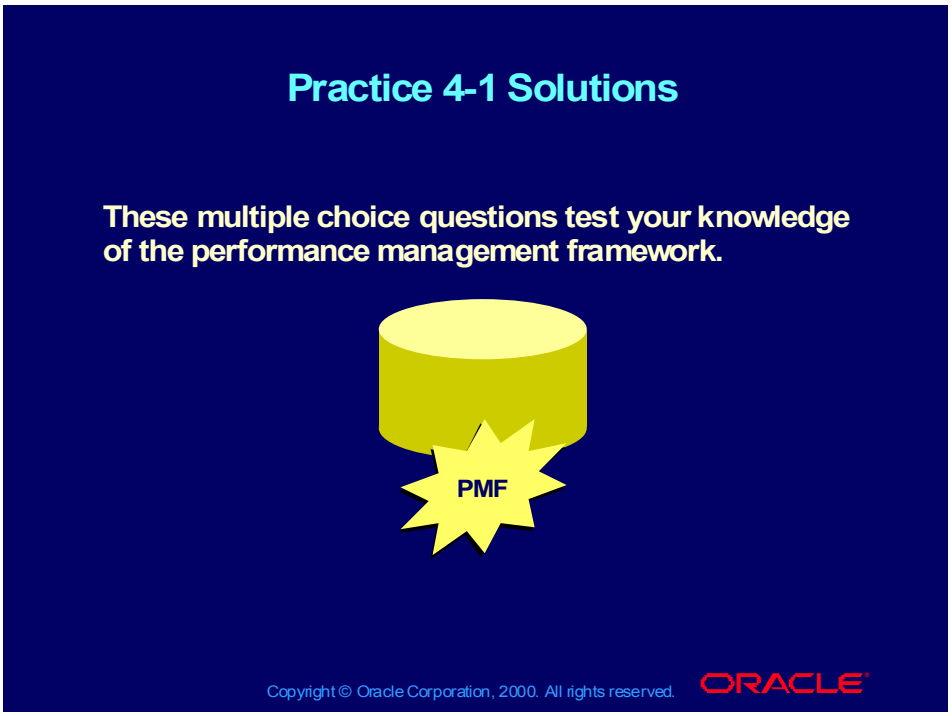

Practice 4-1 Solutions

Multiple Choice Questions

1 A performance measure is:

a An interface used to measure the performance of the applications

b A component of Oracle Applications that runs concurrent requests

c A Business goal that is identified in levels

d A workflow-driven procedure used to identify key performers

2 A performance measure dimension level:

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c Describes your business goals

d Defines how you want your measurements to display in workflow

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Practice 4-1 Solutions (continued)

3 A performance measure target is:

a Used to describe business goals in terms of minimum, maximum, and exact match

b Used to describe system performance goals in terms of minimum, maximum, and exact match

c Actual values from the Oracle Applications transactional system

d An Oracle alert that finds a target that you define

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d A real value from the Oracle Applications transactional system

5 To customize a performance measure dimension level:

a Define the layers and then add the values

b Define the month and organization

c Select a value for time and organization

d Select a value for time, organization, and unit

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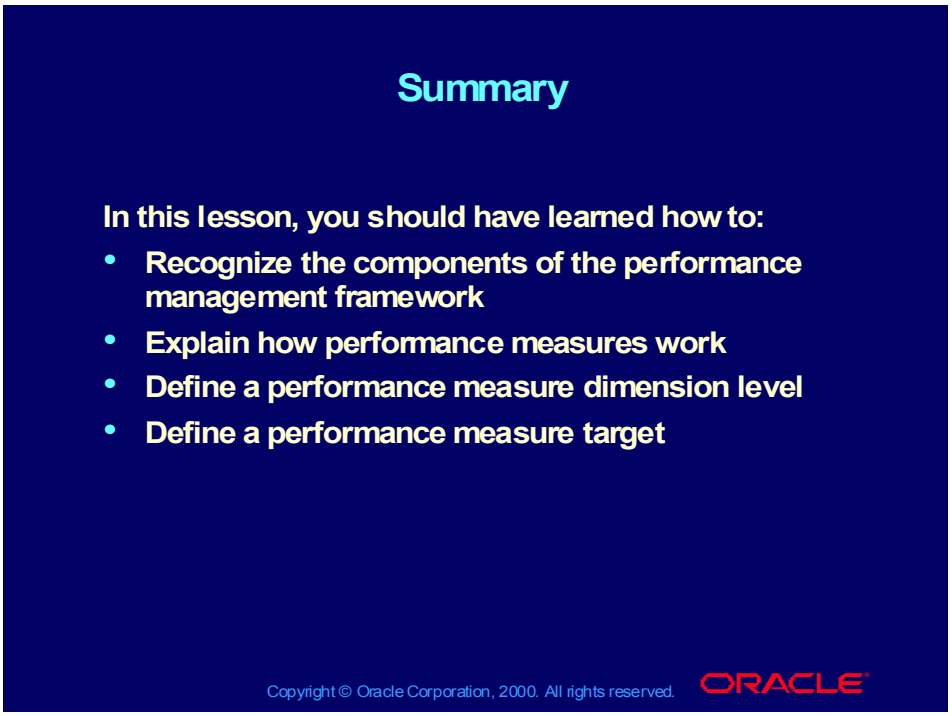

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BIS Alerts

Chapter 5

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BIS Alerts

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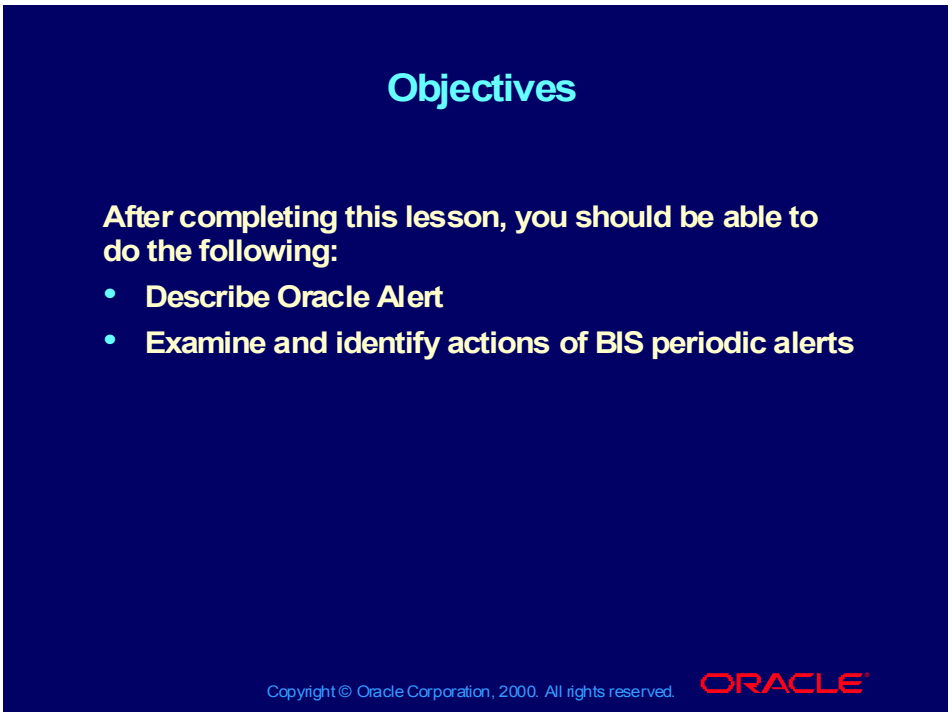

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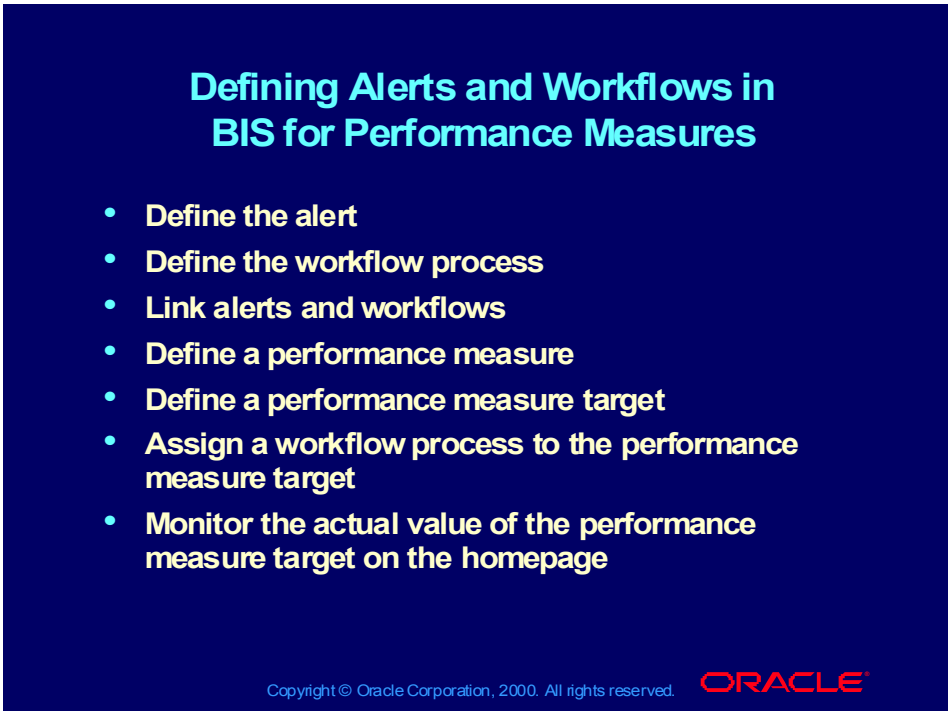

Using BIS Alerts and Workflows

The slide identifies the steps for defining alerts and workflows in BIS for performance measures.

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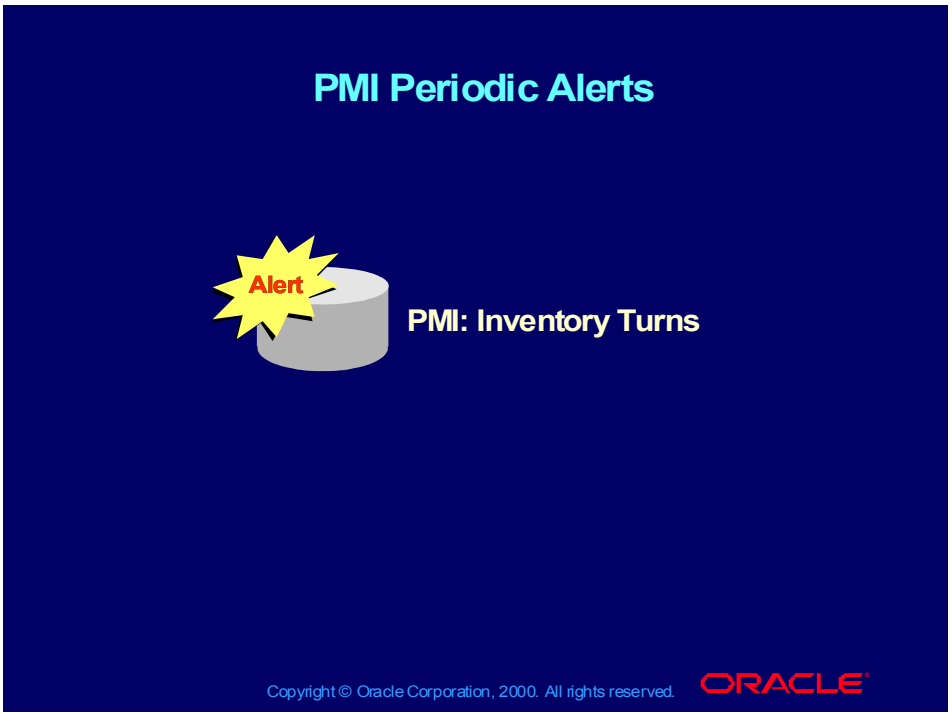

PMI Periodic Alerts

Alerts

An alert monitors your business information and notifies you when conditions that you specify are met.

Oracle Process Manufacturing Intelligence (PMI) has alerts designed specifically for BIS, to work in conjunction with workflow and performance measures. The slide shows a list of PMI periodic alerts.

Alert Types

There are two types of alerts, event and periodic. An event alert is triggered when an insert or update occurs on a database table that you specify. A periodic alert is triggered on a schedule that you specify.

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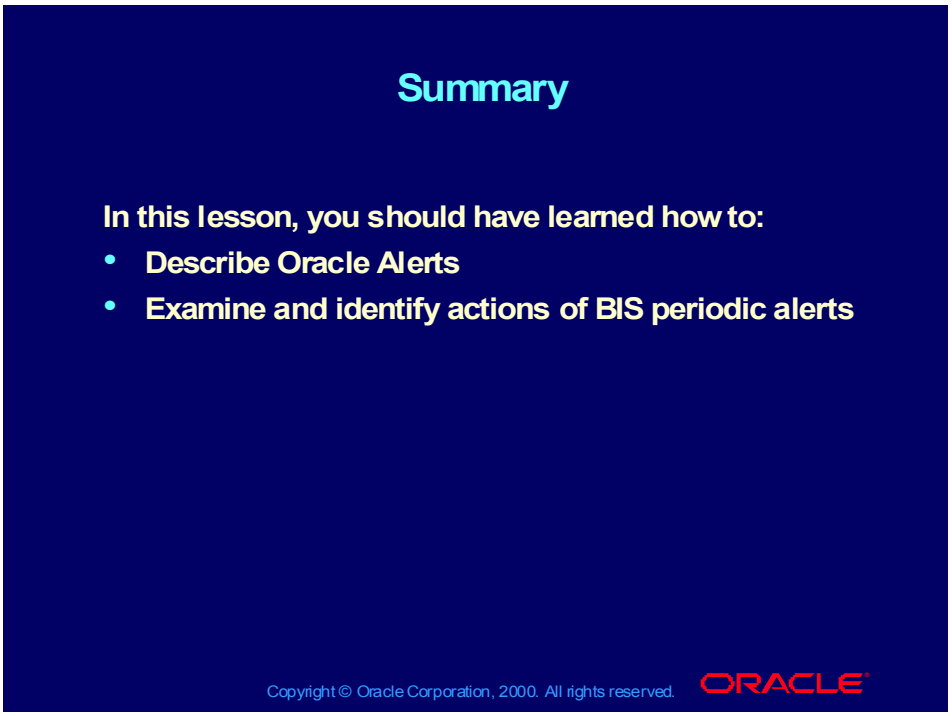

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Reports and Analysis Workbooks

Chapter 6

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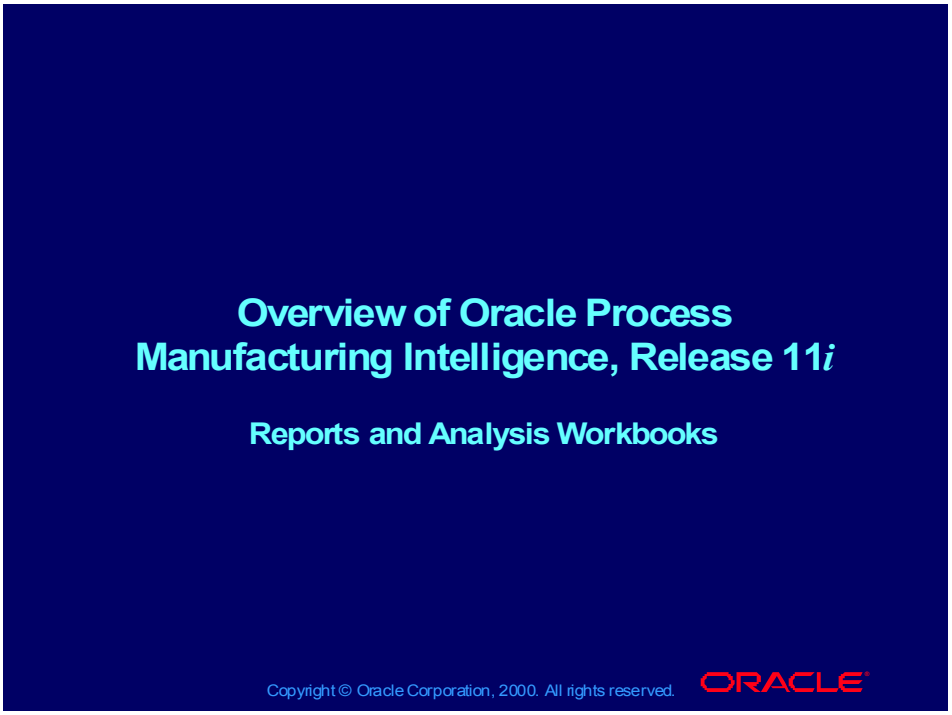

Reports and Analysis Workbooks

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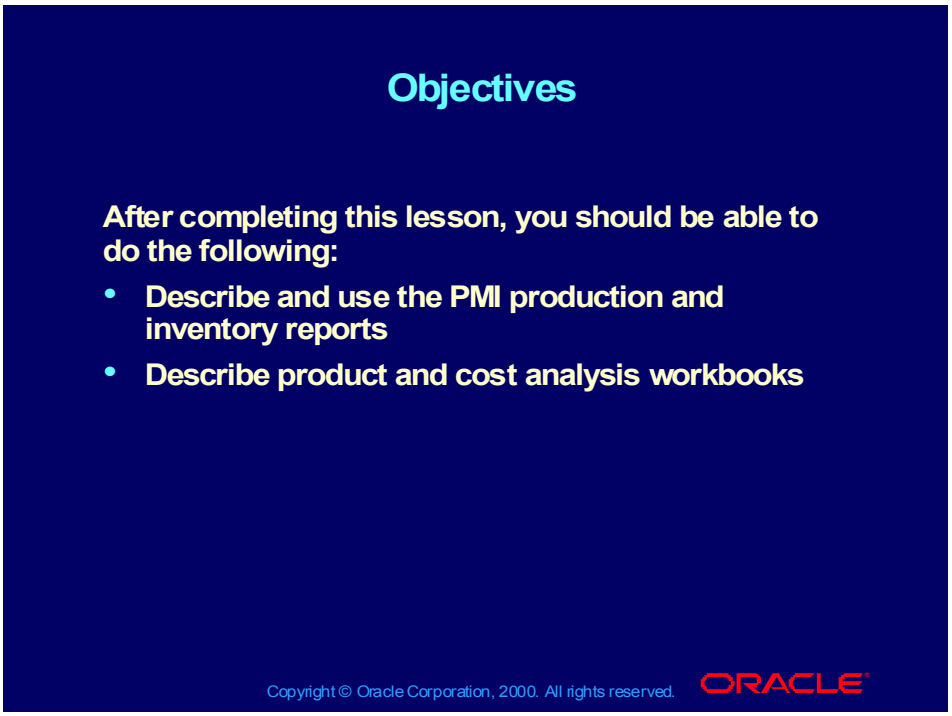

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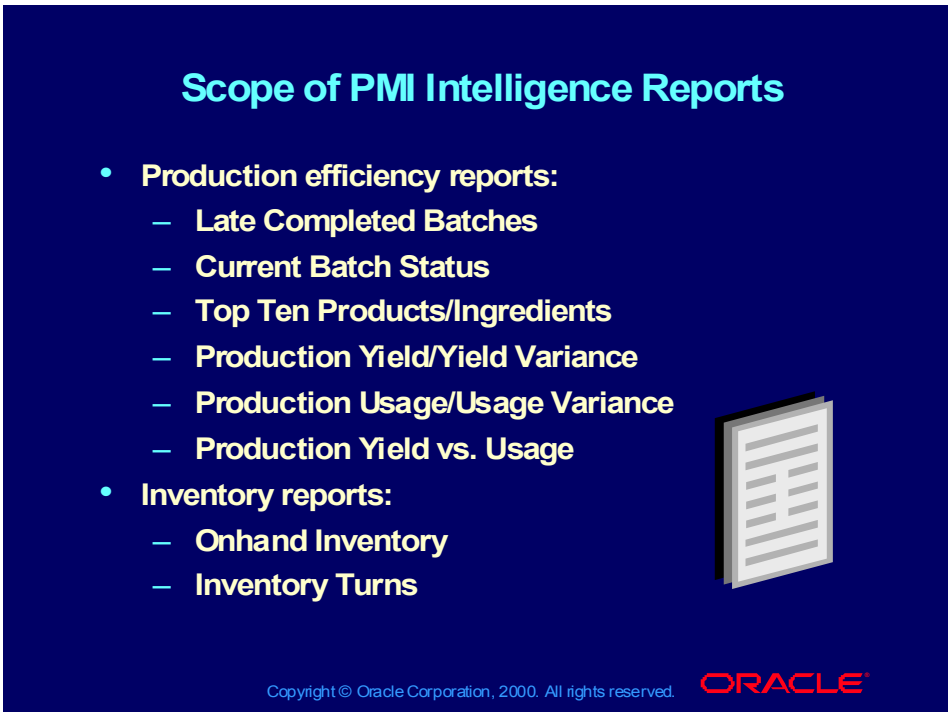

Reports

To help understand actual performance in core process manufacturing business areas such as production and inventory, PMI delivers new functional content in two focus areas:

- Process Manufacturing Production Efficiency Reports:
  - Top Ten Products
  - Top Ten Ingredients
  - Current Batch Status
  - Late Completed Batches
  - Production Yield
  - Production Yield Variance
  - Production Usage
  - Production Usage Variance
  - Production Yield vs. Usage

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Reports (continued)

- Process Manufacturing Inventory Reports
  - Onhand Inventory
  - Inventory Turn

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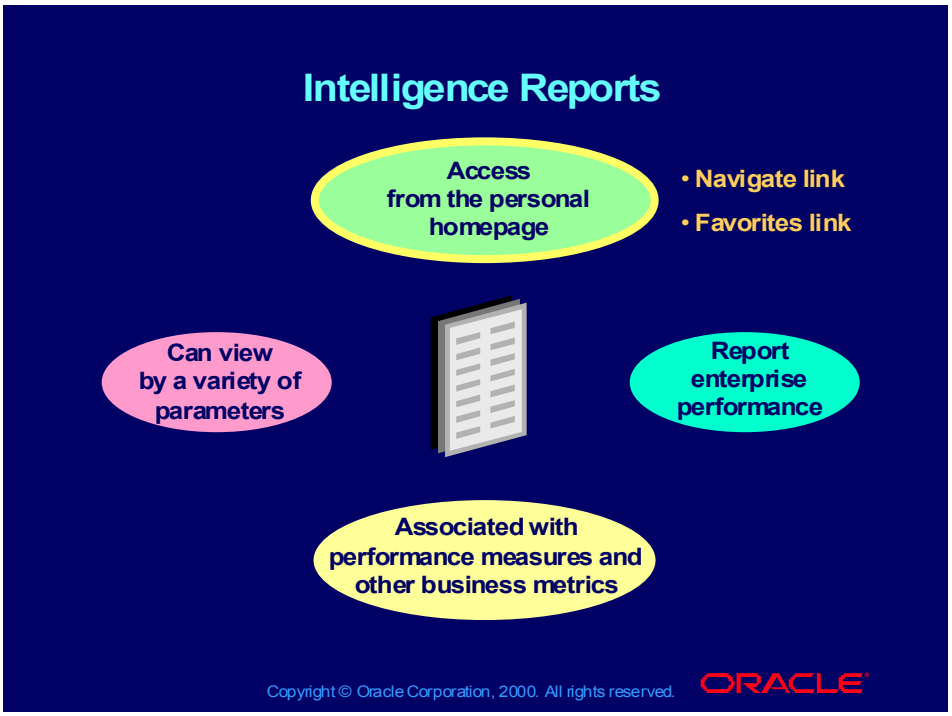

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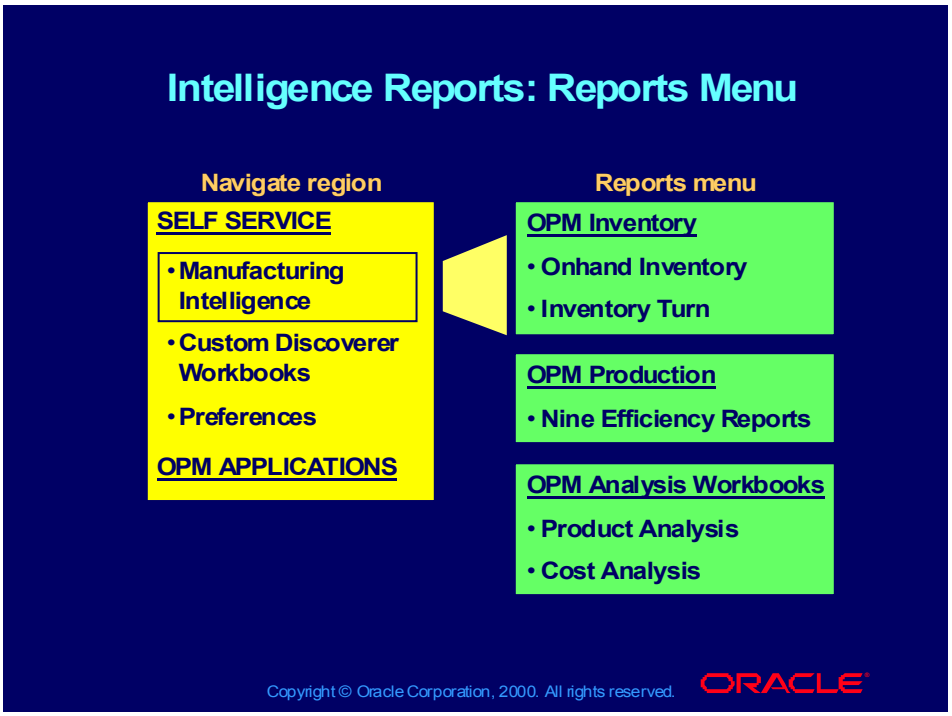

Reports Menu

Intelligence reports provide business information that has been extracted and summarized from existing transactional systems. You access the BIS reports menu from the Navigate region of the personal homepage.

Intelligence reports originate from the Oracle Reports product. BIS comes preseeded with intelligence reports for each intelligence area and performance measures.

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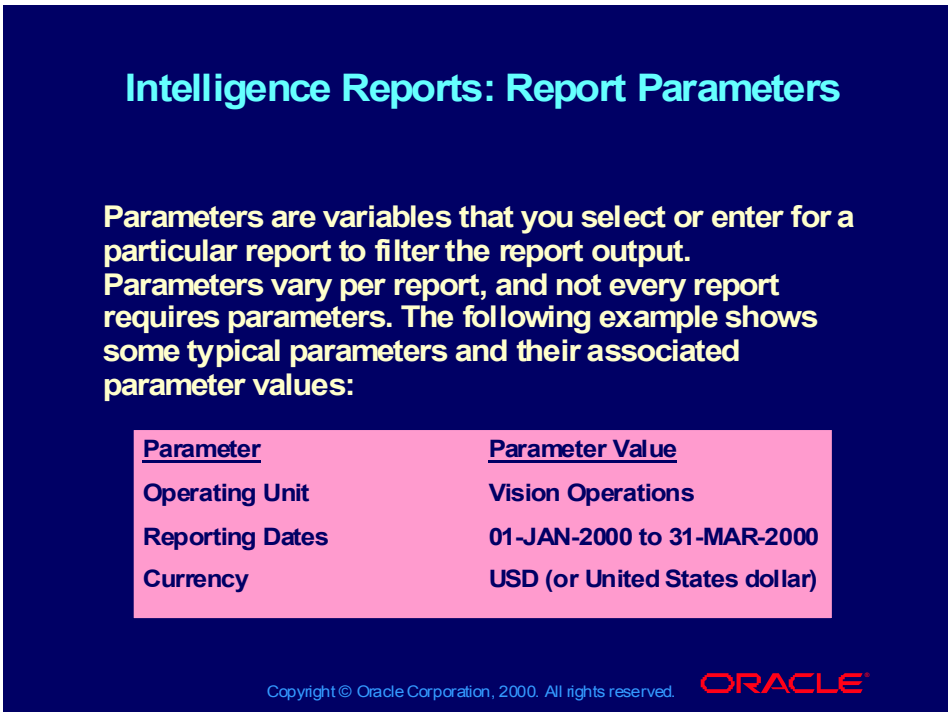

Report Parameters

You typically select parameter values from a list of values associated with the parameter.

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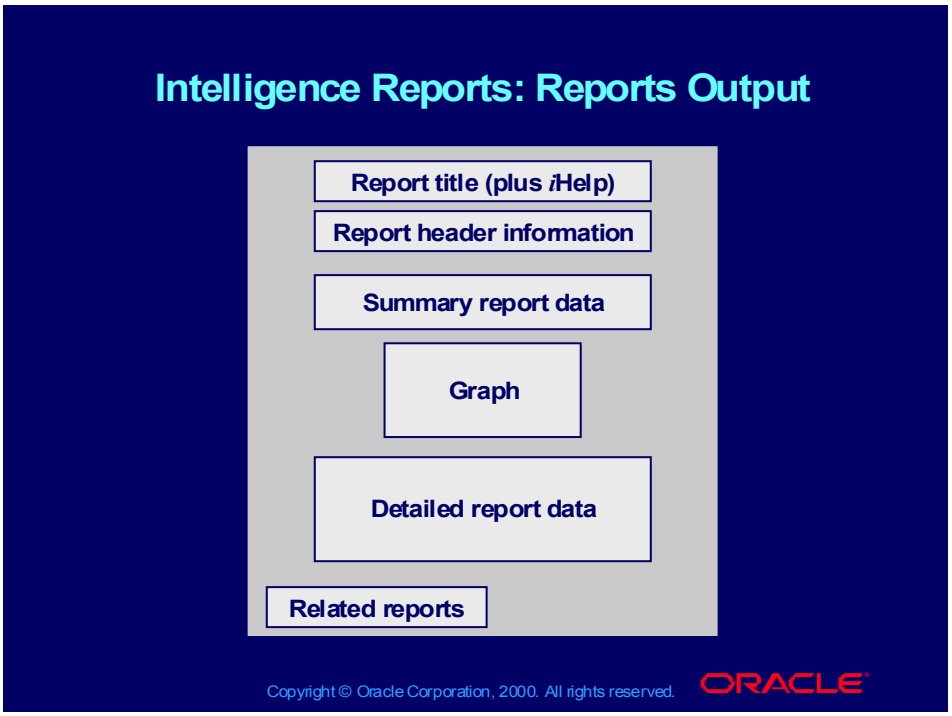

Reports Output

When viewing reports, observe the following general layout information:

- Details applicable to the entire report, including the report parameters, appear under the banner.

  Note: This is indicated as Report Header Information in the slide.
- Following the header information, the report typically contains current data and a graph or chart. The data following the report typically includes additional detailed data about the report.
- The Related Reports section provides links to related reports. This section is located at the very bottom of the report. You might need to scroll to see these links. Alternatively, you can click the Related Reports icon, which is located in the Banner page of the report.

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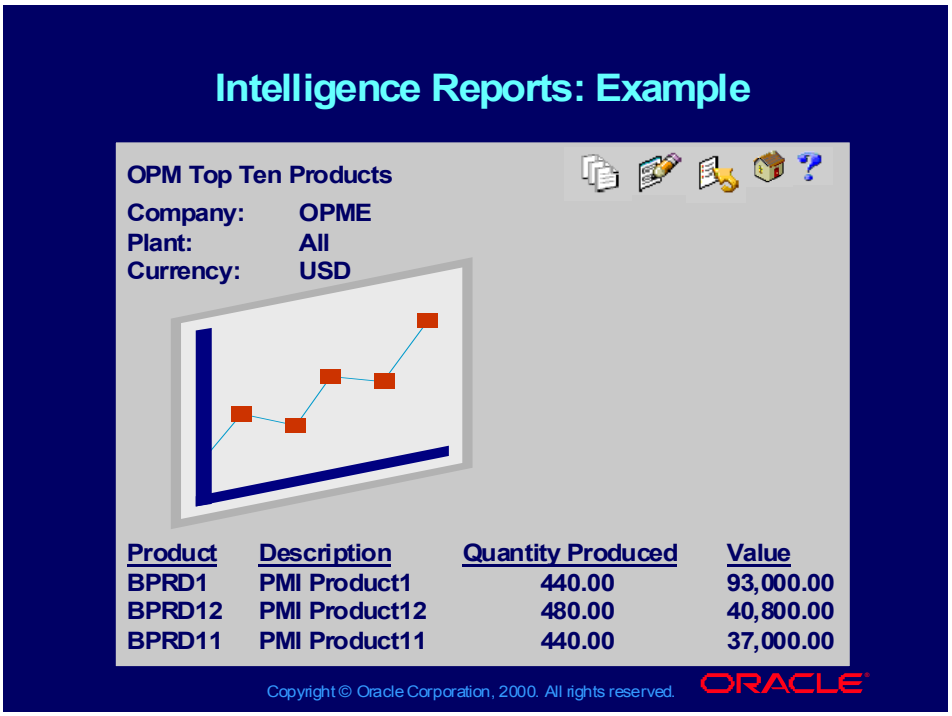
Intelligence Reports: Example



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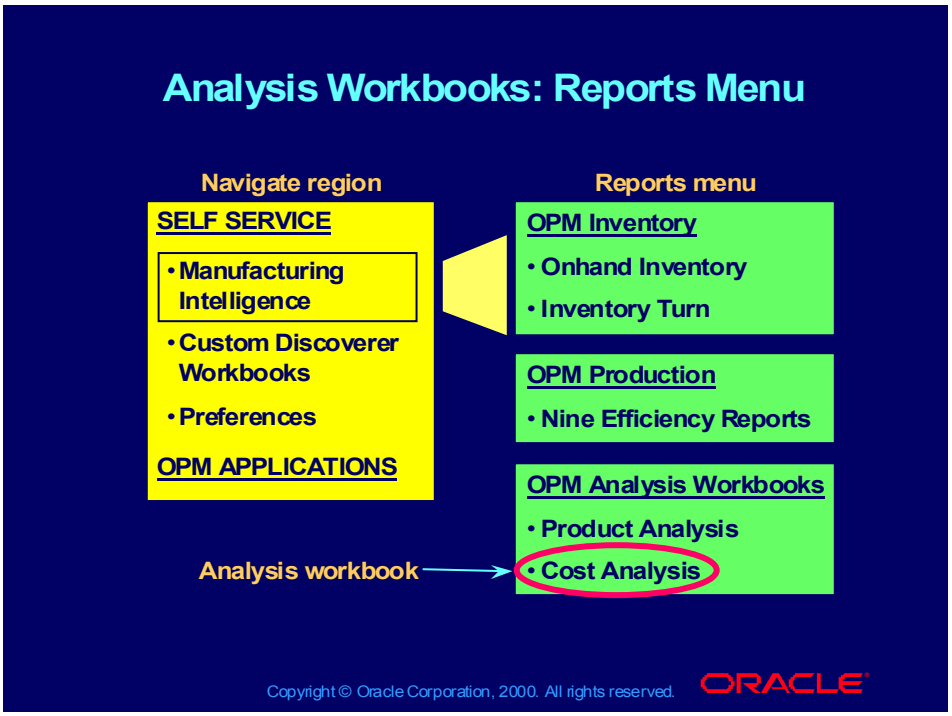

Analysis Workbooks

Workbooks are designed to provide information in various forms, such as worksheets and related charts. Using Oracle Discoverer through BIS, you can analyze your data interactively. You can drill down to more detailed data or collapse columns and rows to see less detail.

PMI provides the following analysis workbooks and related worksheets and charts:

- Cost Analysis Workbook
  - Item Cost Listing (CDA)
  - Item Cost Listing (GL)
  - Item Component Costs (CDA)
  - Item Component Cost Variance (CDA)
  - Rollup Formula Details (CDA)
  - Rollup Routing Details (CDA)
  - Rollup Overhead (Burden) Details (CDA)
  - Item - Effective Formulas

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Analysis Workbooks (continued)

- Material Inventory Activity
- Period Inventory Valuation
- System Units of Measure
- Material Variance Summary
- Perpetual Inventory Summary
- Item Cost Mismatch

• Product Analysis Workbook

- Inventory Availability
- Detailed Inventory View
- Customer QC Specification Inventory Match
- Ingredient Drilldown
- Bottleneck Resource Graph
- Margin Source Cost Analysis

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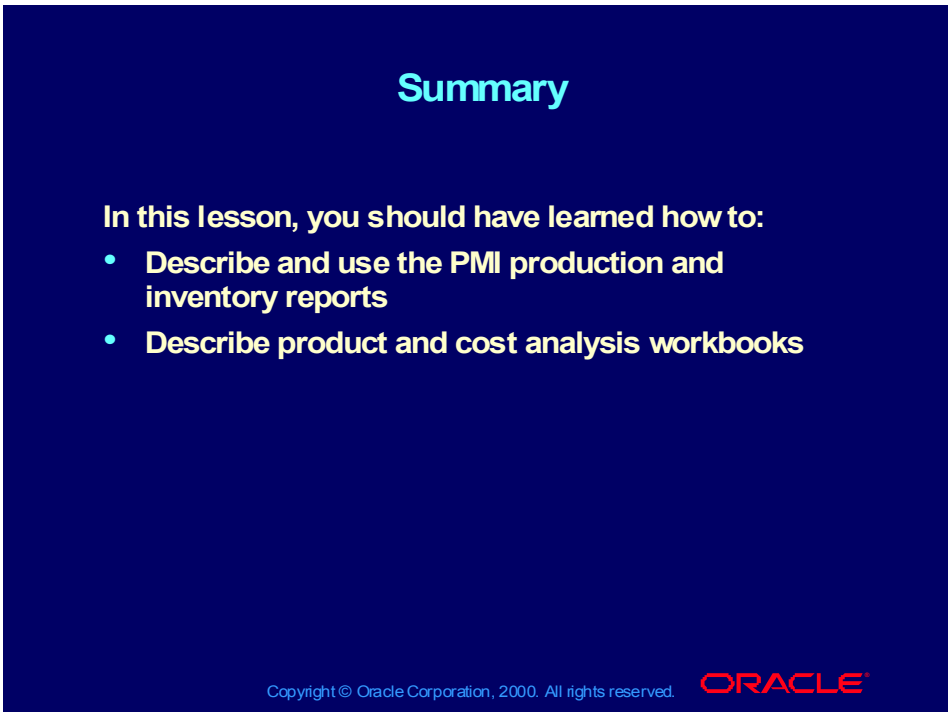

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Business Views

Chapter 7

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Business Views

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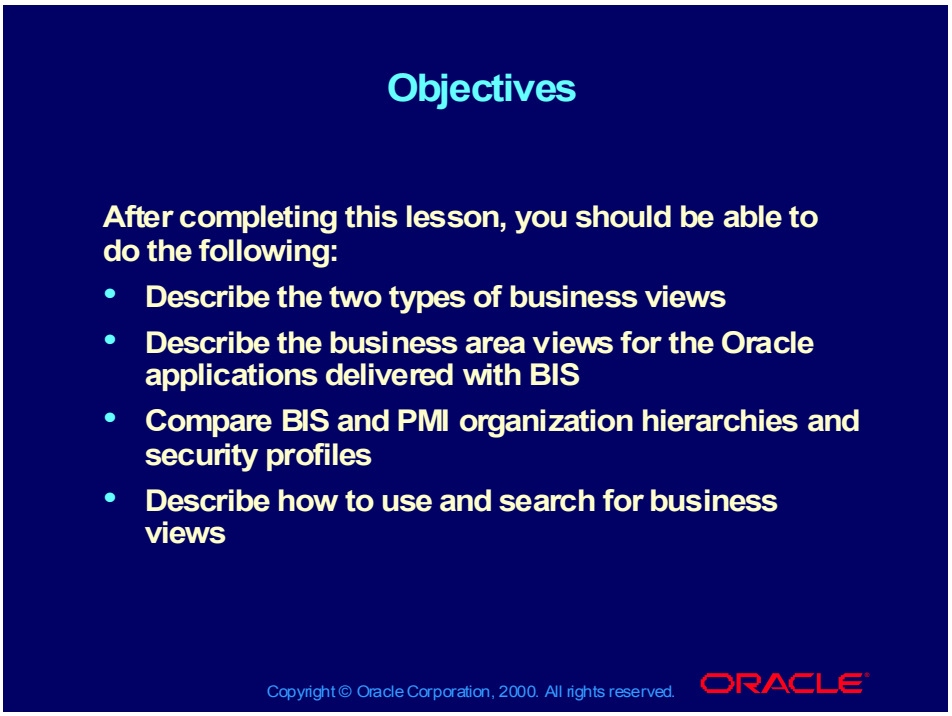

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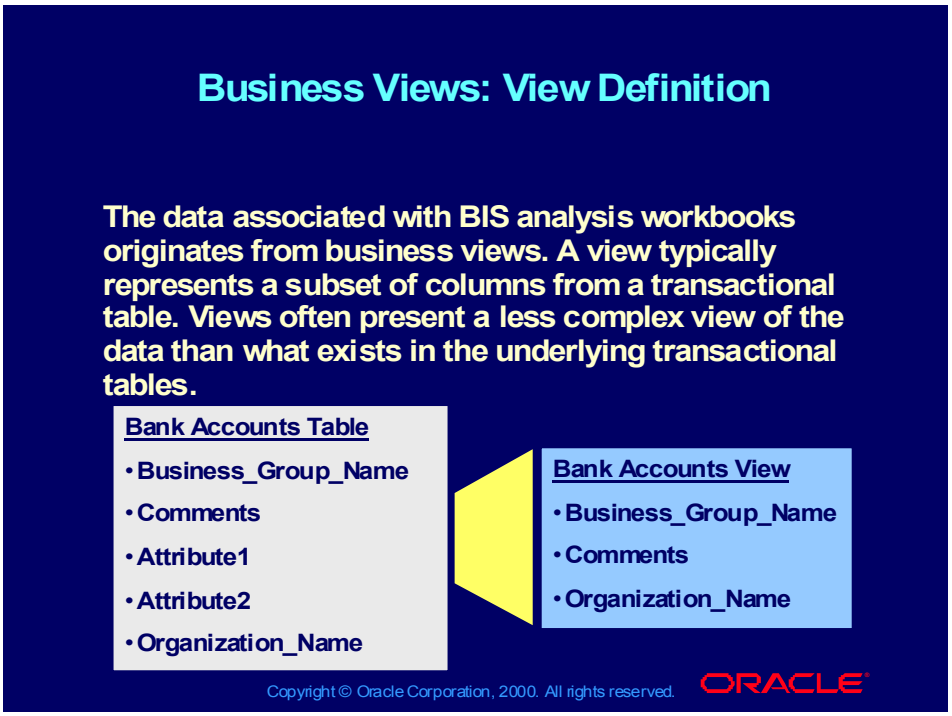

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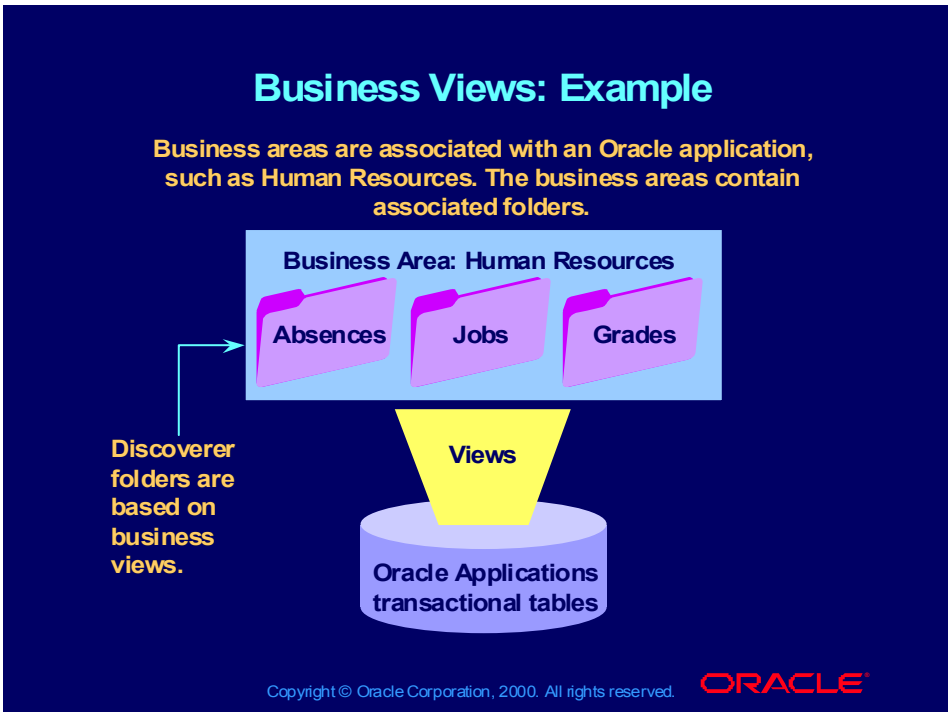
Business Views: Example



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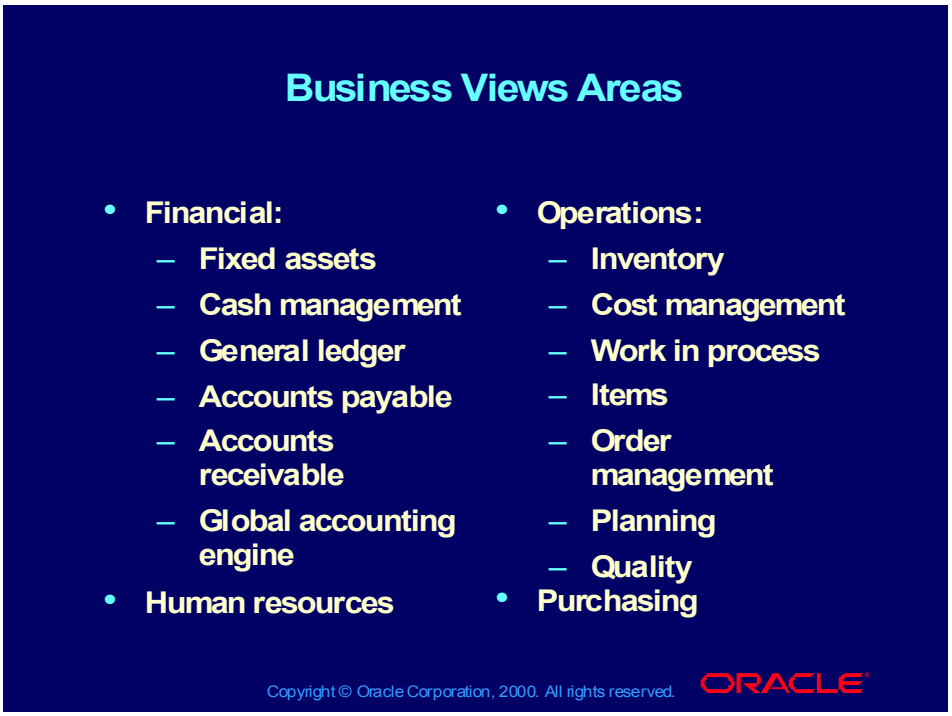

Business Views Areas

BIS delivers approximately 700 business views in Discoverer for many of the business areas shown in the slide.

Using Business Views

Business views are used for ad hoc queries against the Oracle Applications data. These views mask the complexities and codification of the Oracle Applications physical tables and give business analysts and end users a quick and reliable way to perform ad hoc data analysis. Business views provide comprehensive coverage of Oracle Applications business data.

Business views offer a base set of standard views that end users can utilize to construct customized views to support their specific queries or that can be defined to support queries through a query tool.

Oracle Business Intelligence System includes two types of business views:

- **Base views:** These views represent business objects as defined by the Oracle Applications logical data model. They are named after the entities defined in the logical data model and include one column for each attribute of the entity and one column implementing the foreign key corresponding to each relationship.

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Busniess Views Areas (continued)

- **Full views:** These views are similar to base views but also resolve the foreign keys to the related objects.

Reference

For more information on business views, see the *Oracle Applications Business Objects Technical Reference Manual.*

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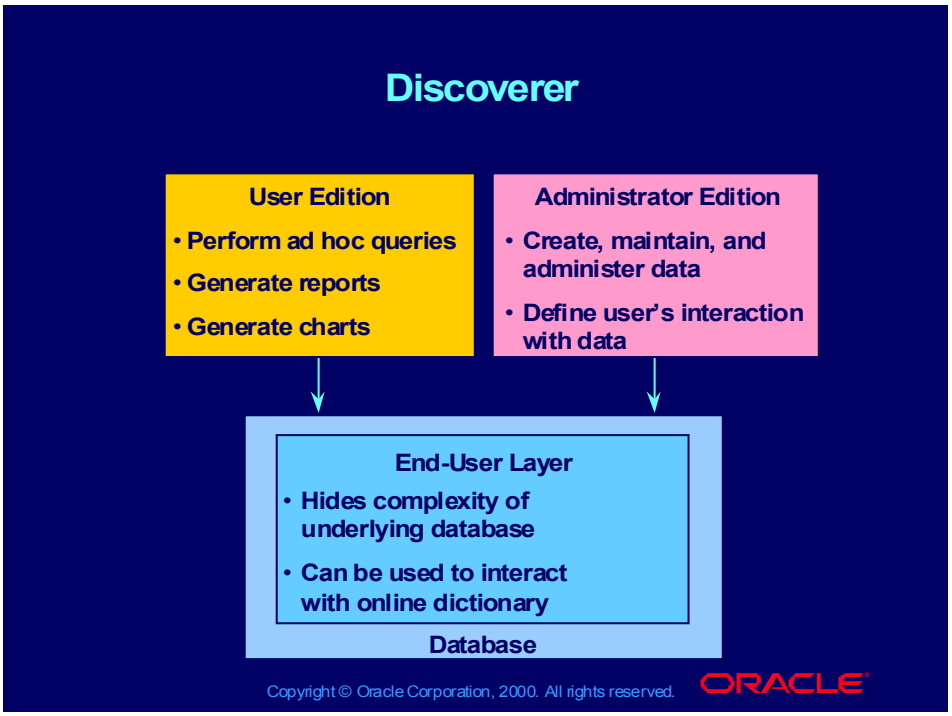

Discoverer End-User Layer for BIS

Together with business views, Oracle Business Intelligence System includes an end-user layer for Oracle Discoverer containing:

- A business area for each Oracle Applications logical data model diagram
- A folder for each full business view

A business area is a logical grouping of objects. These objects can be tables, views, or combinations of tables and views. The structure of the objects in a business area is hidden from the end user. BIS has tables and views that belong to defined business areas, and these business areas are composed of folders that are meaningful to the end user.

This tool makes it very easy to take full advantage of your business views and to perform even the most complex queries and analyses.

Business areas correspond to Oracle Applications folders. Folders correspond to tables or views. Items correspond to columns in a table or view.

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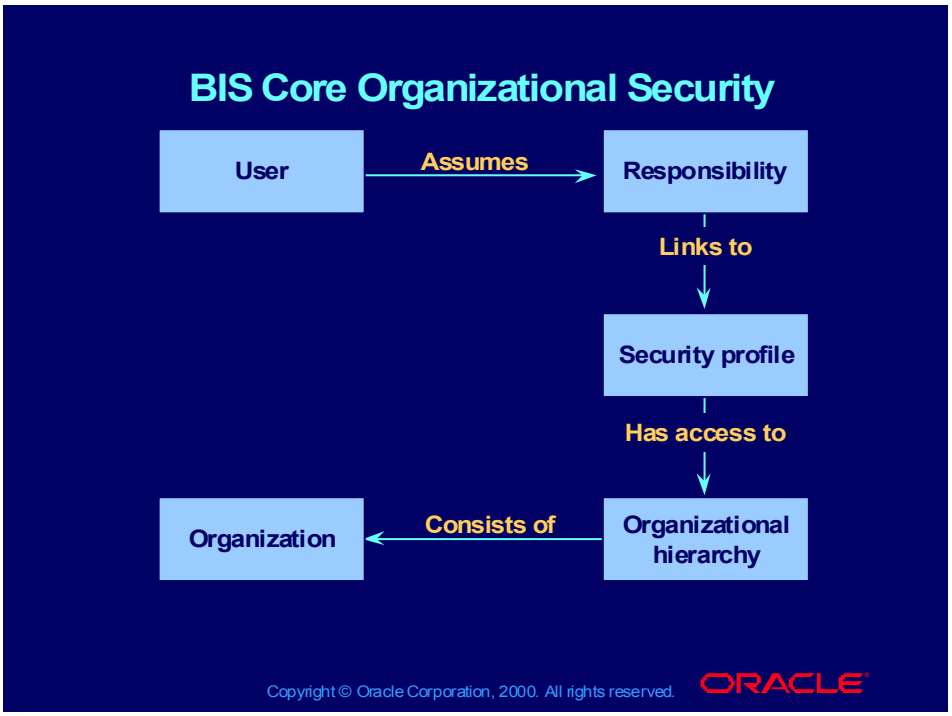

BIS Core Organizational Security Versus PMI Security

BIS Core Organizational Security: Business views secure selected rows by organization, so that users can query information pertaining to the organization to which they have been granted access.

By default, business views read the multiple organization setup and users can query information related to the organization associated with the responsibility with which they are connected. Also, it is possible to grant access to more than one organization at a time so that users can perform cross-organization analysis.

Perform the following steps to define organizational security:

1. Define organizational hierarchies.
2. Define security profiles.
3. Associate security profiles to your responsibilities.

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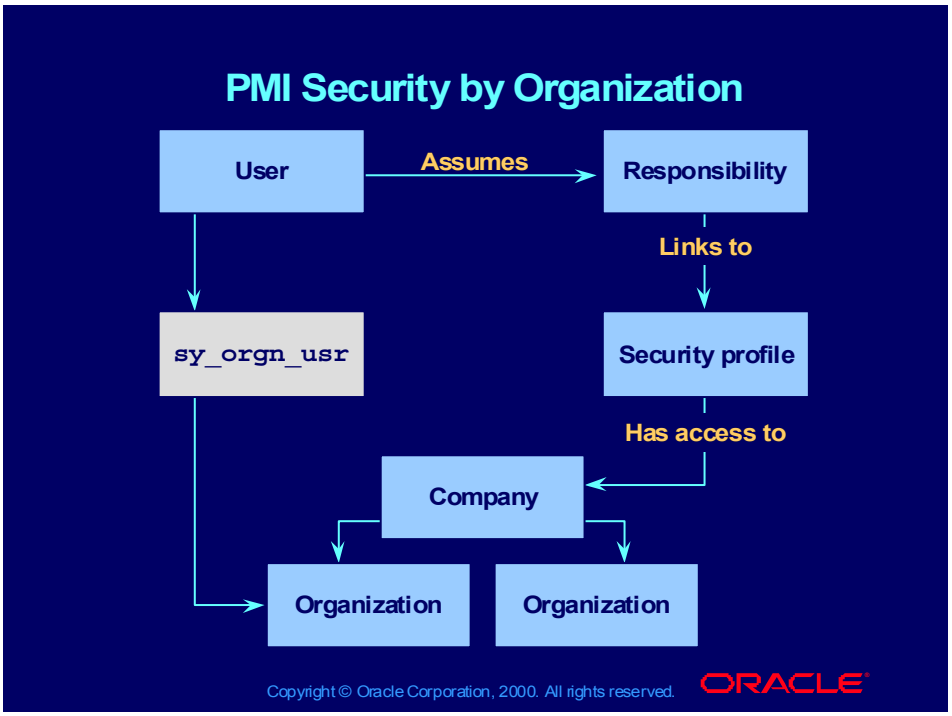
PMI Security by Organization



PMI Security

Discoverer in Application Mode: Oracle Discoverer, Release 3.1.26 and later, supports access to Oracle Applications databases using application usernames, passwords, and responsibilities. As a result, PMI analyzers are as secure as the OPM application itself.

Secured Business Views

- Security functions attached to business views restrict users from viewing records that are not related to the organizations to which they do not have access.
- Oracle Applications user responsibility is verified against associated organizations in `sy_orgn_usr`.
- User profile, PMI default company All, and PMI default company can be used to set access privileges for a user.

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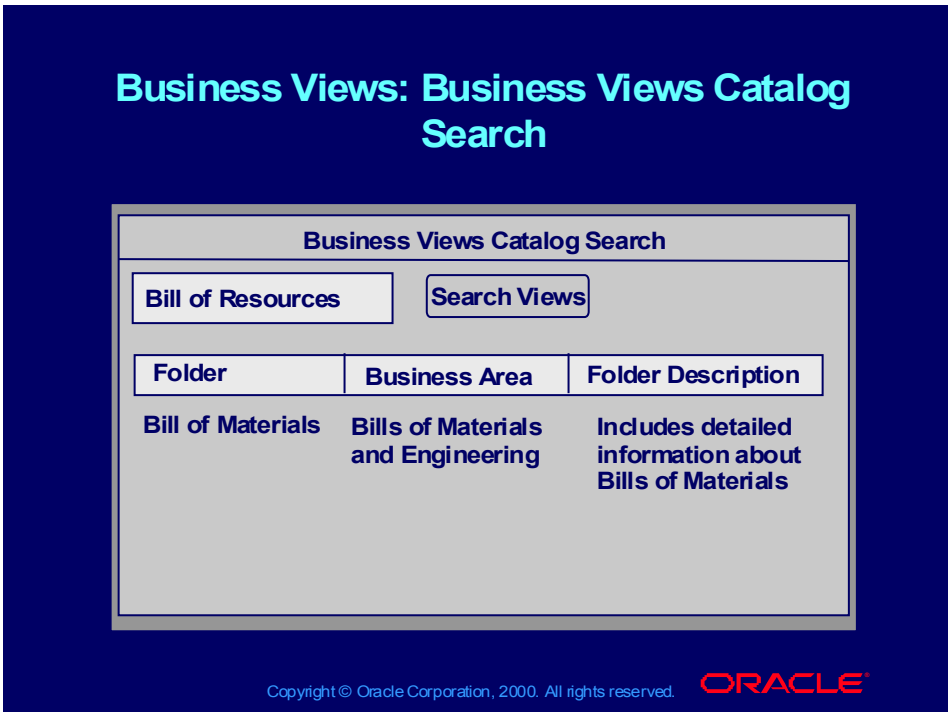

Using Business Views with Oracle Discoverer 3.2

Oracle Discoverer provides an Oracle Applications mode that has been tailored to fit this end-user layer. In this mode, the user can connect to the Discoverer User Edition by using the Applications username and password and an Applications responsibility. This way, Discoverer users do not need to know the password for the Applications schema of your database.

Reference

For detailed instructions about using Oracle Discoverer, see the *Oracle Discoverer User's Guide.*

Searching Business Views

Oracle Business Intelligence System provides you with the ability to search for business views in the Discoverer end-user layer.

You can customize your homepage to include the Business Views Catalog search engine. Enter any word or sentence in natural language and submit a search. The search engine uses Oracle ConText to query the view names and view descriptions. It returns a list of folders that reference the desired business views, and for each folder it lists the description and the business area that the user can access to query it. The results are sorted by folder, business area, and folder description.

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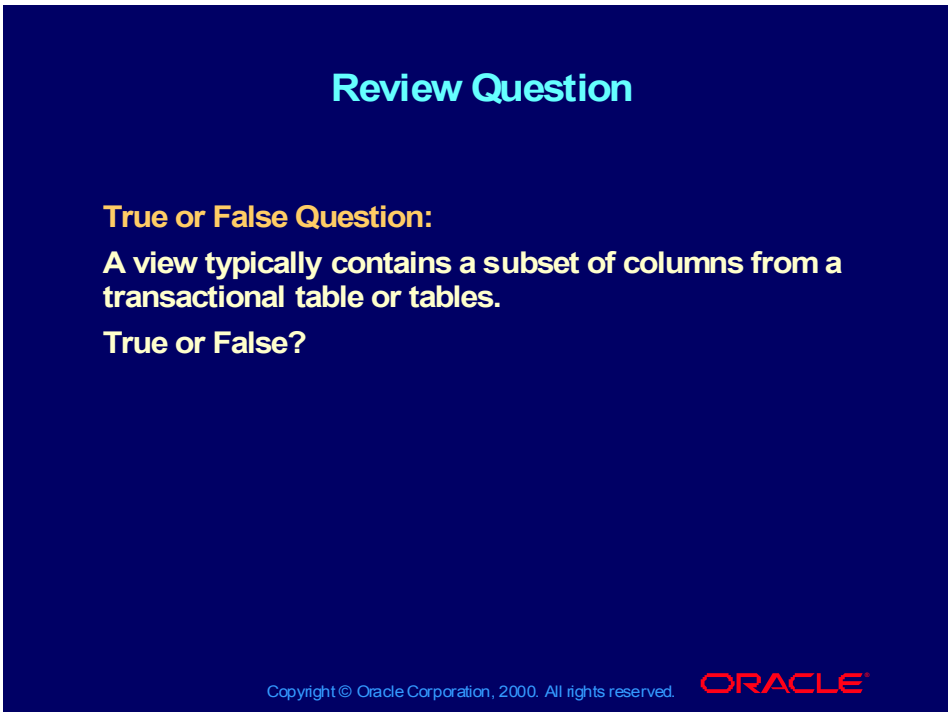

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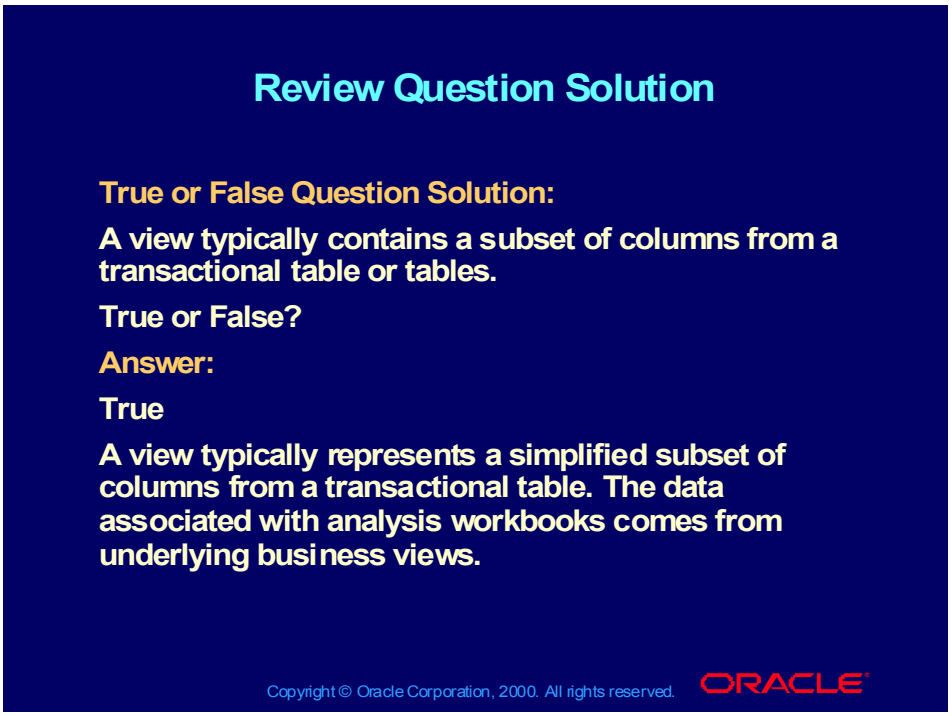

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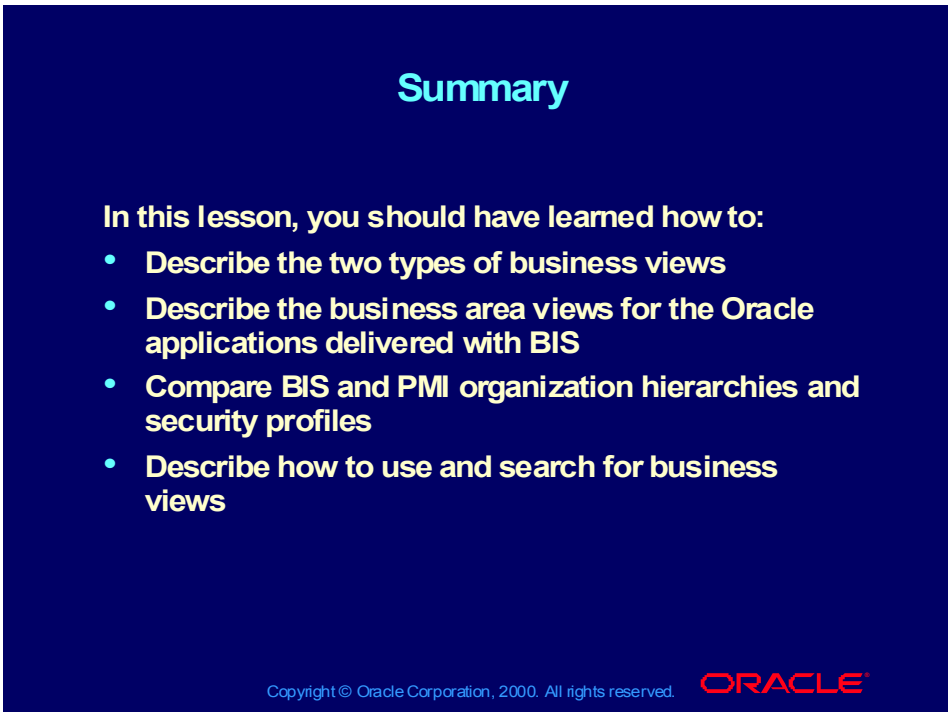

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Implementation Considerations

Chapter 8

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Implementation Considerations

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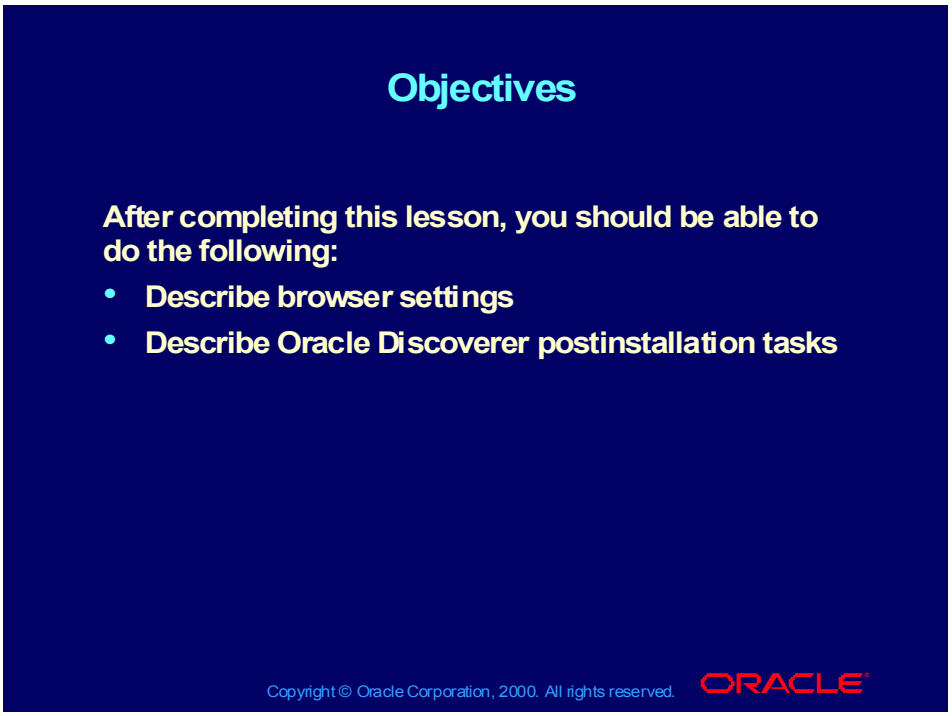

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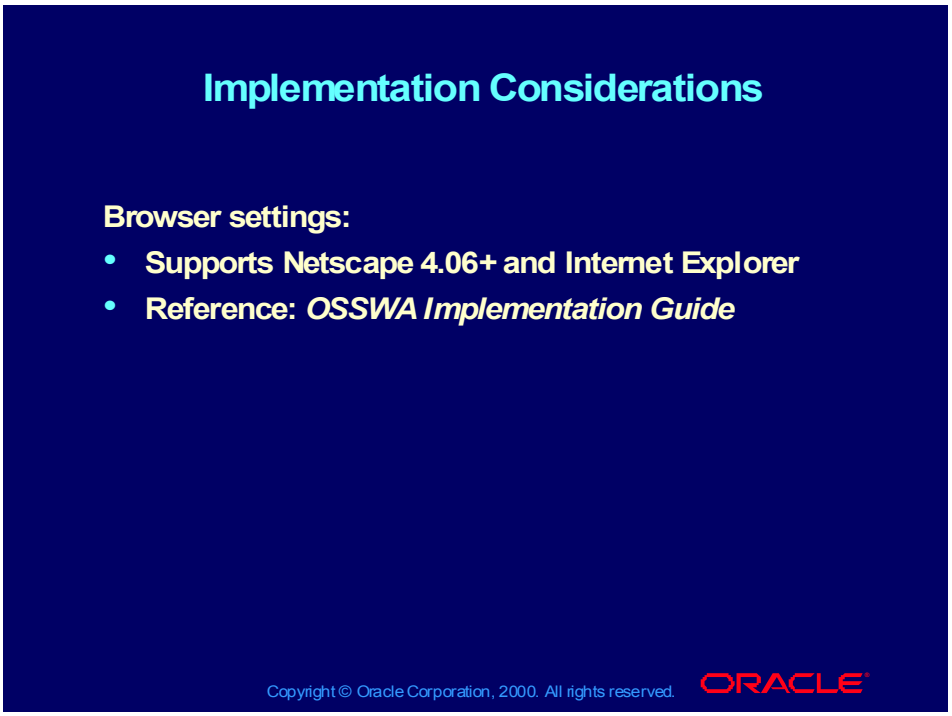

Implementation Considerations Overview

Browser Settings

Use small fonts resolution 800 x 600 at smallest, preferably higher (for example, 1,024 x 768 or 1,280 x 1,024).

- **Note 1:** This is referred to as the desktop area in Windows Control Panel\Display\Settings.
- **Note 2:** The desktop area has nothing to do with the SSWA browser window size (whether kiosk mode or not). The SSWA browser window size is set by the application and generally is 800 x 600. Setting the desktop area to 1,024 x 768 or larger provides access to the desktop behind the SSQA window.
- **Browser:** Version 4.0 and later.

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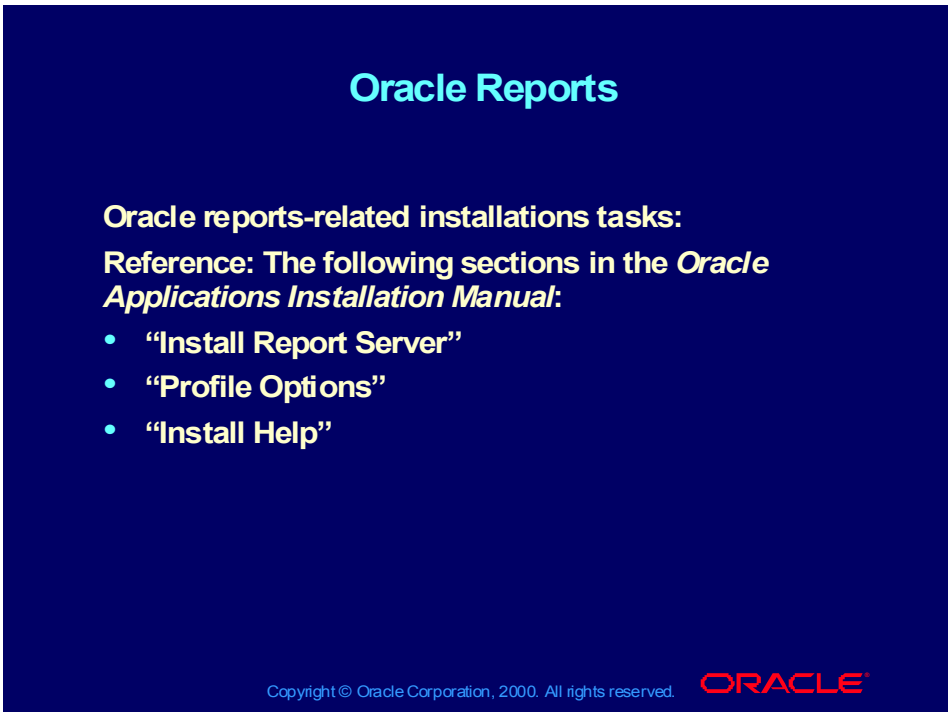

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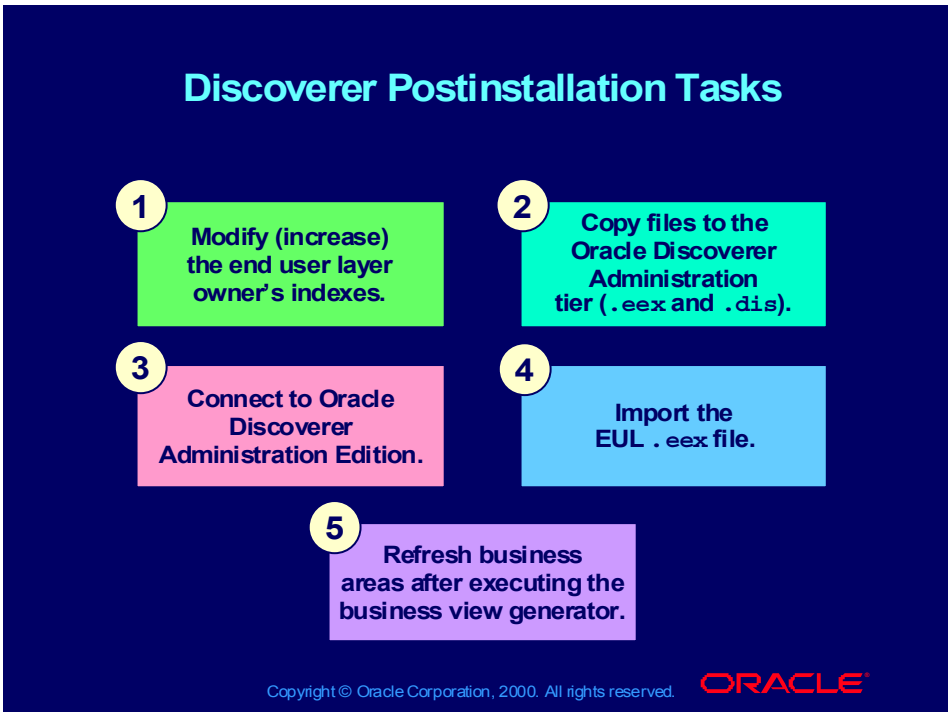

Implementation Considerations Overview (continued)

Discoverer postinstallation tasks are shown in the slide. Remember to verify the following information:

- If the end-user layer (EUL) owner (database user) is suffixed with `_languagecode`. Example: `EUL_US, EUL_F`
- The end-user layer owner has the necessary access to FND object. Refer to the "Grant" section in the *Oracle Discoverer Installation Guide*.
- An application mode end user layer has been created. Example: When the end-user layer was created, the `/APPS_MODE` command line parameter was added.
- Check through Oracle Applications and verify the ICX Profiles. Example: `ICX_DISCOVERER_LAUNCHER, ICX_DEFAULT_EUL, ICX_DEFAULT_WORKBOOK_OWN`

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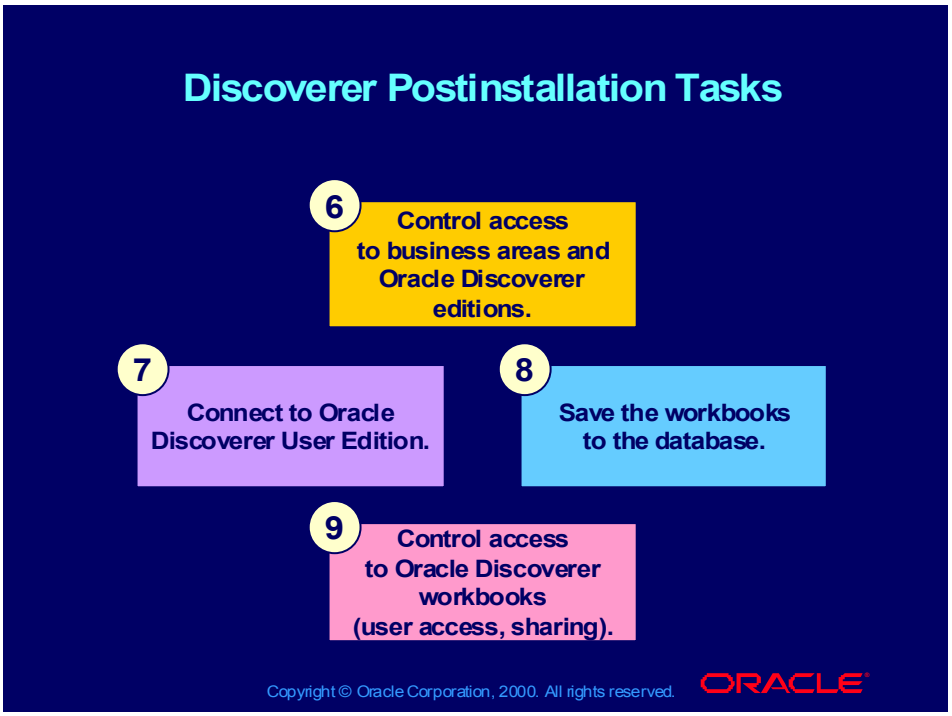

Implementation Considerations Overview (continued)

Access to workbooks is granted through Web Discoverer only. The Client Server User Edition will not be supported from Oracle Application11*i*. Access Discoverer administration tasks through the Client Server Administration edition. To perform initial workbook sharing, you must use the Client Server User Edition.

Discoverer Security

Define Organization Hierarchies (optional) In this step you define sets of organizations that you want to associate with responsibilities. For detailed instructions on how to create organizational hierarchies, see the following *Oracle Human Resources User's Guide*.

Define Security Profiles Option (optional) In this step you associate an organization hierarchy to a security profile. For detailed instructions on how to create Security Profiles, see the *Oracle Human Resources User's Guide*.

Associate Security Profiles to Your Responsibilities (optional) In this step, you associate a security profile to a responsibility. For each responsibility that you want to use in Discoverer with business views, you need to populate the System Profile HR: Security Profile responsibility level to the appropriate security profile.

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Implementation Considerations Overview (continued)

Self-Service Application Homepage Setup Please refer to the Setup Homepage section in the *Oracle Self-Service Application (OSSA) User's Guide.*

Grant User Access At this point, all of the technology pieces have been installed. You must now grant the user access to BIS. This requires using Oracle System Administration, Release 11*i* to assign appropriate BIS responsibilities to users who need to access BIS. For new users, you may also need to create user accounts.

Responsibilities	**Access**
Financials Intelligence	Access to BIS Financials reports and workbooks
Operations Intelligence	Access to BIS Operations reports and workbooks
Human Resources Intelligence	Access to BIS Human Resources reports and workbooks
Purchasing Intelligence	Access to BIS Purchasing reports and workbooks

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Implementation Considerations Overview (continued)

Responsibilities	Access
Process Manufacturing Intelligence	Access to BIS Process Manufacturing reports and workbooks
Performance Management Framework	Access to Performance Measure (Full Access) and Target windows
Performance Management Framework	Access to Target window (Targets Access)
BIS Superuser	Access to Flexfield Mapping Territory Hierarchy (Geography Dimension), Regions and Area setup (Geography Dimension)
Preferences	Access to configure personal homepage regions
Business Views Setup	Access to business views setup

Enable Alerts: Navigate to the Alerts window and enable Oracle Alert. Refer to the *BIS Implementation Guide* for more information.

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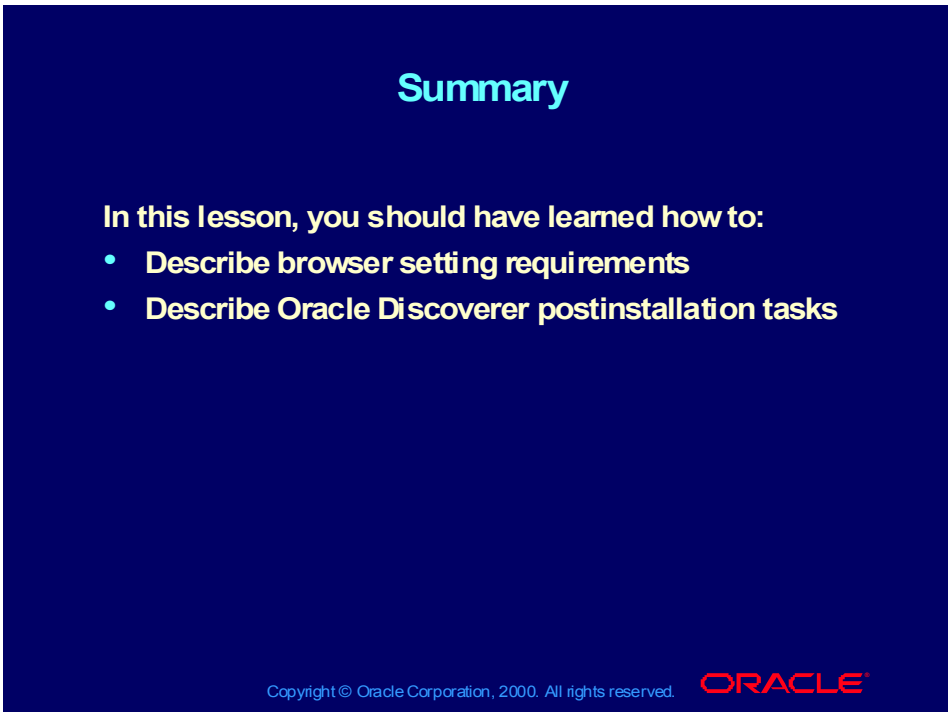

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Course Summary

Chapter 9

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Course Summary

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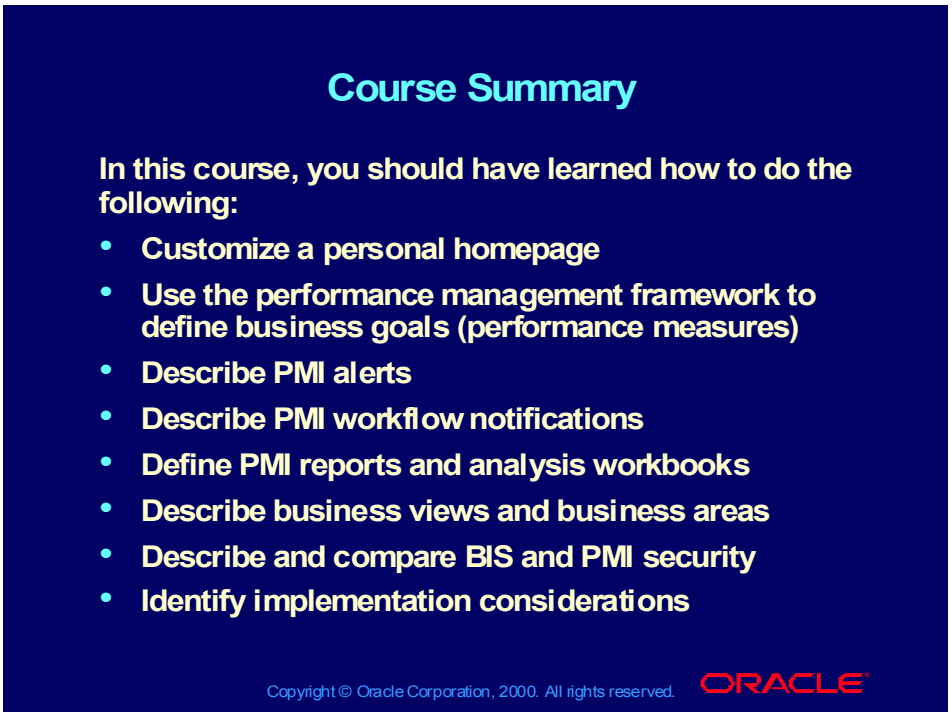

Course Summary

Business Intelligence System Review

You learned that Oracle Business Intelligence System (BIS) provides a general business performance management framework in addition to intelligence information and analysis capabilities to measure the enterprise performance.

BIS is an integrated reporting, decision support, and corrective action system targeted to managers, business analysts, and executives. You learned that you can set personal and corporate objectives for key business conditions, such as cash flow, earnings per share, product quality, and so on. You saw how these business conditions, or performance measures, can be perpetually evaluated behind the scenes.

How Is BIS Different from Competing Systems?

- Integrated information access to all of the Oracle Applications
- Available for any level of a company's personnel, not just top-level management
- Uses the management by objective methodology

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