



**ONE**  
CONNECT



# Log In Instructions

# How To Log In To Oracle Cloud

- **Step 1:** Open your web browser,
  - Click on the UAT environment link → <https://iayzqy-dev4.fa.ocs.oraclecloud.com/> or add in your browser.
- **Step 2:** Click on ‘Company Single Sign-On’ button.
  - You will be redirected to your company’s Single Sign-On (SSO) page.
- **Step 3:** Enter your organization email address.
  - Enter your network password (the same password you use for Outlook).
  - Click ‘Sign In’.
- **Step 4:** Once verified, you’ll be redirected to the Oracle ERP Cloud home page.



Shelby County Tennessee (IAYZQY-DEV4)

Shelby County ERP and HCM Sign In

Identity domain ⓘ

fa-iayzqy-dev4-slu2j

User Name

Password

[Forgot Password?](#)

Sign In

Or sign in with



Shelby County She...



Shelby County Gov...

[Need help signing in?](#)




English



# How To Log In To Oracle Cloud

- **Step 1:** Open your web browser (Click on the UAT environment link) →
  - <https://iayzqy-dev4.fa.ocs.oraclecloud.com/>



  
**Shelby County Tennessee (IAYZQY-DEV4)**  
Shelby County ERP and HCM Sign In

Identity domain ⓘ  
fa-iayzqy-dev4-slu2j

User Name

Password

[Forgot Password?](#)

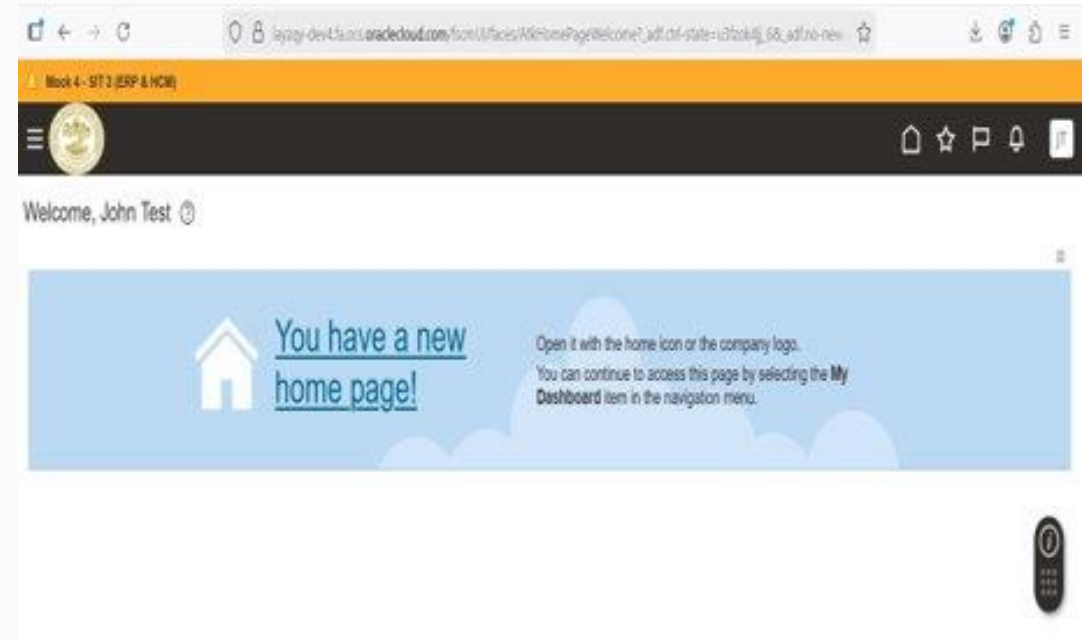
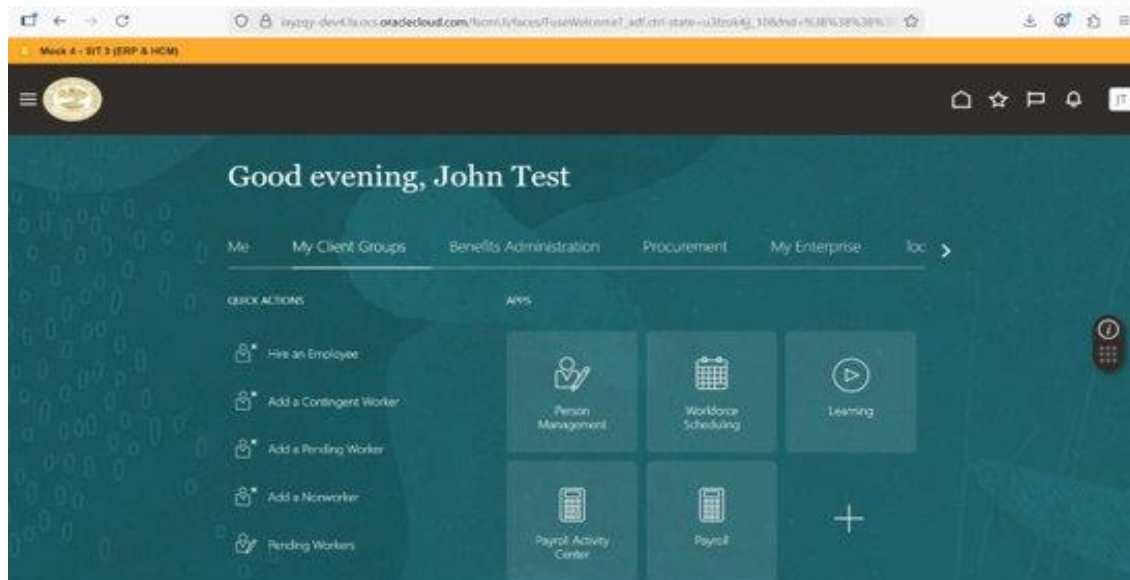
Or sign in with

[Need help signing in?](#)

 English ▾

# How To Log In To Oracle Cloud

- **Step 5:** After logging in, you will see the Oracle ERP Cloud dashboard.
- **Step 6:** Click on the 'You have a new home page!' link to view the home screen.

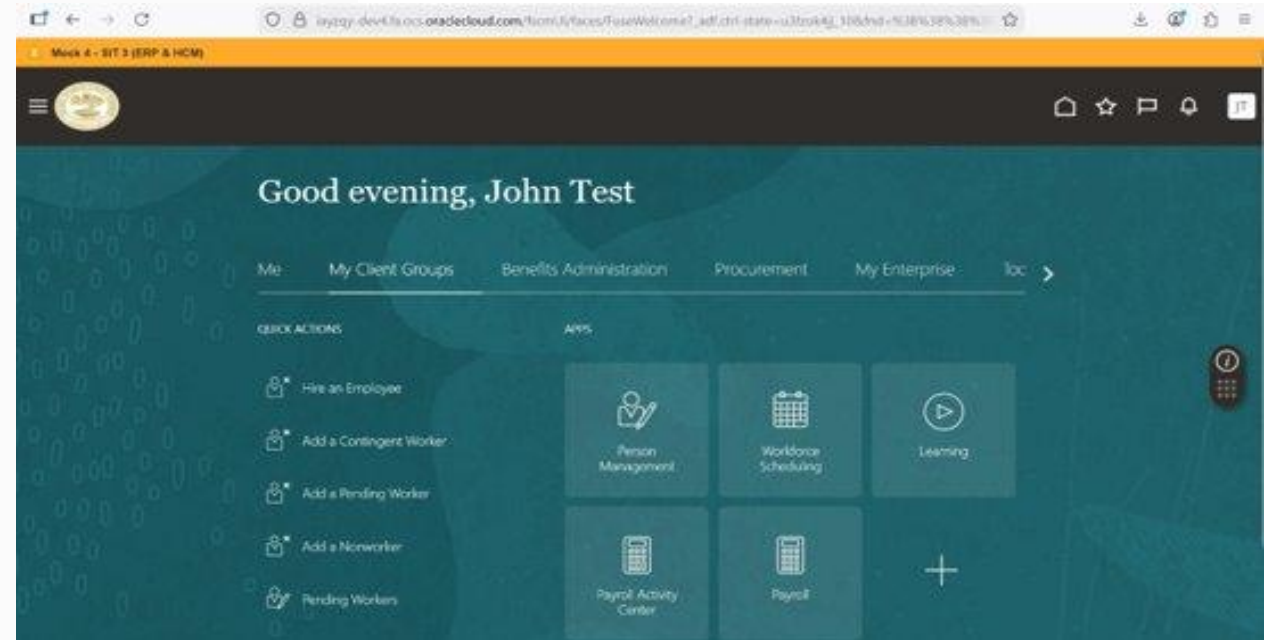


- **Step 7:** Click on icons or tiles to open specific applications.

# How To Log In To Oracle Cloud

- **Step 8:** Click on Hamburger sign or three horizontal lines on the top left of the screen.
- **Step 9:** Select the specific process area or application to open and confirm your access for a specific area.

**MODULE HOME PAGE**





## ORACLE REPORTING

## Kickoff & Navigation Training

December 2025



Technology, Processes & People

## ❖ Welcome & Introductions

- ❖ Review Today's Agenda

## ❖ Overview:

- ❖ Oracle Reporting –Report Types

- ❖ Pros and Cons

- ❖ Fit and Purpose – Right Tool for the right job

## ❖ OTBI Review

- ❖ Navigation

- ❖ Security

- ❖ Subject Area Review

- ❖ Features

## ❖ Creating Analytics

- ❖ Basics of Creating Analysis

- ❖ Criteria/Formulas/Prompts

- ❖ Scheduling and Delivery



Technology, Processes & People

## ❖ Welcome & Introductions

- ❖ Review Today's Agenda

## ❖ BI-Publisher

- ❖ Structure/Catalog Overview
- ❖ Data Model Development
- ❖ Report Structure and Output Types
- ❖ Scheduling and Delivery

## ❖ HCM Extract

- ❖ Navigation Overview
- ❖ Structure
- ❖ Definition
- ❖ Scheduling and Delivery

## ❖ Closing

- ❖ Q & A
- ❖ Evaluation
- ❖ Next Steps

## ❖ Adjourn



## Ground Rules

Identify how we will work well together today.



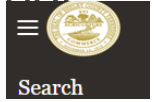
# Ground Rules

- Be Present/Participate
- On Conversation at a Time
- Stay on Topic (Parking Lot)
- Cell Phones on Silent
- No Texting Please
- Back from Breaks on Time
- **Have FUN!**

# OneConnect Oracle Cloud

Enterprise Performance Management - EPM	Enterprise Resource Planning - ERP	Human Capital Management - HCM
Budget Management	General Ledger	Human Resources (HR)
	Accounts Payable	Benefits
	Accounts Receivables	Payroll
	Expense Management	Recruiting
	Purchasing	Learning
	Cash Management	Compensation
	Asset Management	
	Projects Management	
	Grants Management	

# Glossary

- OTBI – Oracle Transactional Business Intelligence
- BI Publisher – Business Intelligence Publisher
- HCM Extract- HCM Only Data Extraction Tool
- Hamburger – Menu upper left of screen 
- Filters – Limits Data selected by using criteria
- Formula – Functoriality to transform data

A scenic view of a large bridge at dusk over a river, with city lights visible in the foreground. The bridge is illuminated with warm lights, and the sky is a mix of blue and orange. The foreground shows a residential area with lit-up buildings.

# Oracle Reporting *Overview*

# OTBI → BI Publisher → HCM Extract

- OTBI
  - Pros
    - Business user friendly Tool
    - Drag and Drop report building
    - Pre-Built Subject Area
    - Security linked to Data Security Roles
  - Cons
    - Limited to Subject Area
    - Lack of Visibility to behind-the-scenes data structures
- BI Publisher
  - Pros
    - Complex reporting
    - Robust output options(RTF, E-text, XML)
    - Distribution functionality - Bursting
    - Large data volumes
  - Cons
    - Requires technical background - SQL
    - Requires knowledge of underlying Tables
    - Security must be managed separately

# OTBI → BI Publisher → HCM Extract

- HCM Extract
  - Pros
    - Pre-Built User Entity
    - Changes Only Extracts
    - Data Transformation – Fast Formula
    - Robust output options
  - Cons
    - Requires Technical Background
    - Limited to Pre-Built User Entity
    - Fast Formula complexity
    - HCM ONLY

# OTBI → BI Publisher → HCM Extract Use Case

- OTBI – Ad-hoc query tool for real-time self-service reporting
  - ERP
    - Open Receivables
    - Open Payables
    - GL Journal details
  - HCM
    - Person Details
    - Headcount Reporting
    - Absence Management Tracking
- BI Publisher – Technical Reporting tool for Complex reporting and Integration data feed
  - ERP
    - PO Generation
    - Invoice Generation
    - Compliance Reporting
    - Vendor Integration
  - HCM
    - Pay-slip Generation
    - Compliance Reporting
    - Vendor Integration
- HCM Extract – Data Extraction Tool for complex criteria and output
  - New Hire/Termination feed to benefit provider
  - Termination Feed to security group
  - Notification of Promotions

A scenic view of a large bridge at dusk over a river, with city lights visible in the foreground. The bridge is illuminated with warm lights, and the sky is a mix of blue and orange. The foreground shows a cityscape with buildings and trees.

# Oracle Reporting *OTBI Overview*

# OTBI –Security

- Object Level Security
  - Only have access to Business areas based on your Assigned Roles
- Data Level Security
  - Data level Security controls what data is visible from the Subject Area. This security is controlled using the same security/permissions as the application. If you can't access the data through the front-end you will not be able to access it via OTBI
- User Level Security
  - User login authentication

# OTBI – Subject Areas

- What is a Subject area?
  - Pre-defined Logical Grouping of related Oracle HCM and ERP Data
- Common Subject Areas
  - Workforce Management – Worker Assignment Real Time
  - Workforce Management – Worker Real Time
  - Workforce Management – Absence Real Time
  - Payroll- Payroll Run Results Real Time
  - General Ledger-Journals Real Time
  - General Ledger – Balances Real Time
  - Payables Invoice – Transactions Real Time
  - Payables Invoice – Payment History Real Time
  - Procurement – Procure To Pay Real Time
  - Receivables – Customer Details Real Time
  - Receivables – Receipt Details Real Time
  - And Lots more...

# OTBI – Features/Attributes

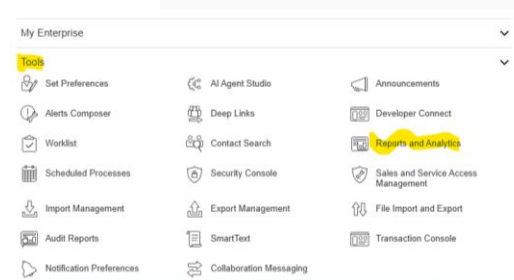
- Criteria Tab
  - Drag and Drop Field Selection
  - Data Filtering - Where clause to refine data selected
  - Formulas- Enables you to perform logic/functions i.e. Sub-string, If Logic, Date Logic
- Prompt Tab
  - Create Interactive Filters for Run Time
  - Prompts have various Input Types including Text Field, Choice List,
- Advanced Tab
  - For Technical Users to modify generated SQL and altar some system variables

A scenic night view of a large bridge spanning a wide river. The bridge is illuminated with warm lights, and its reflection is visible in the water. In the foreground, there are several multi-story buildings with lit windows, suggesting a city or town. The sky is dark with some clouds, and the overall atmosphere is calm and serene.

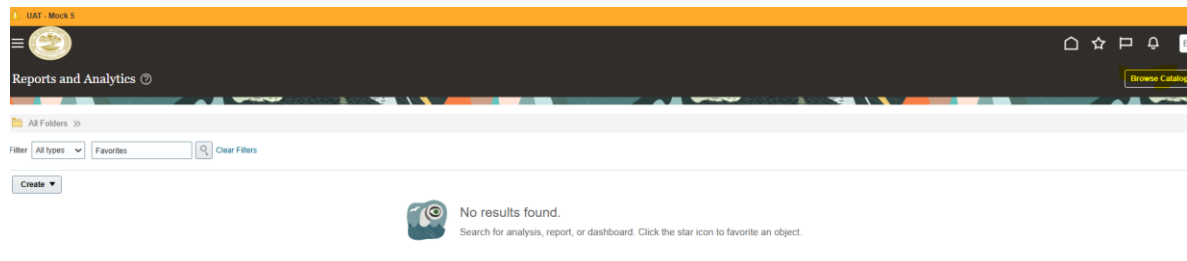
# Oracle Reporting *OTBI Creating an Analysis*

# OTBI – Creating an Analysis

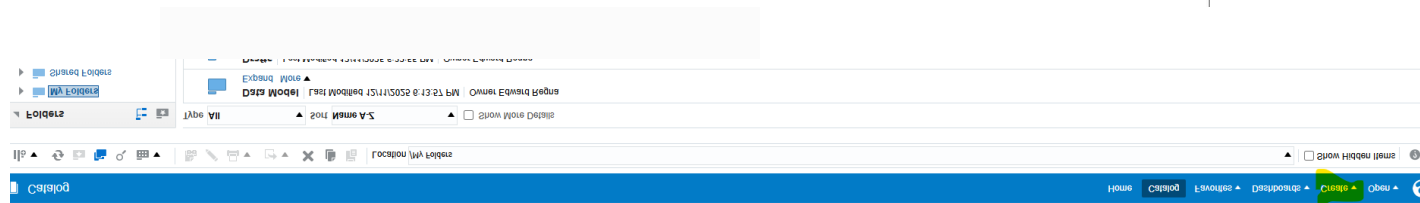
- Navigation
  - Tools → Reports and Analytics



- Browse Catalog



- Create

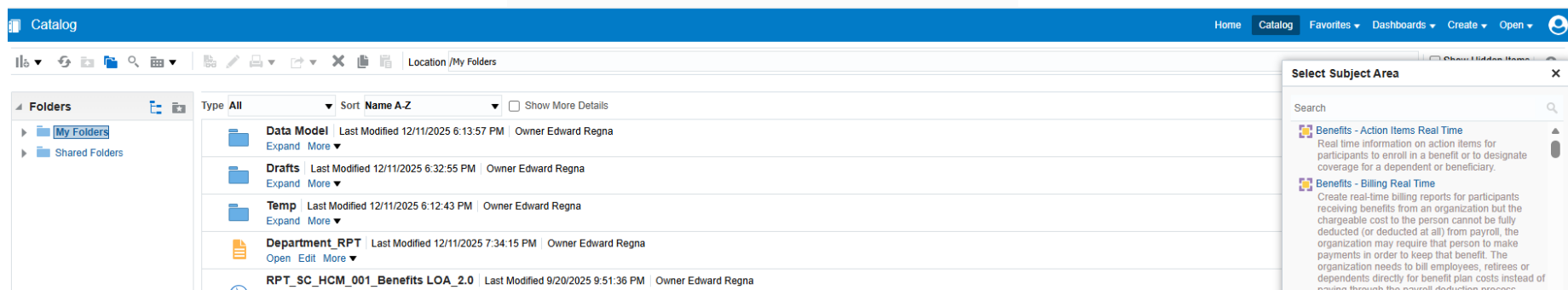


- Bookmark :

[Oracle Transactional Business Intelligence Catalog](#)

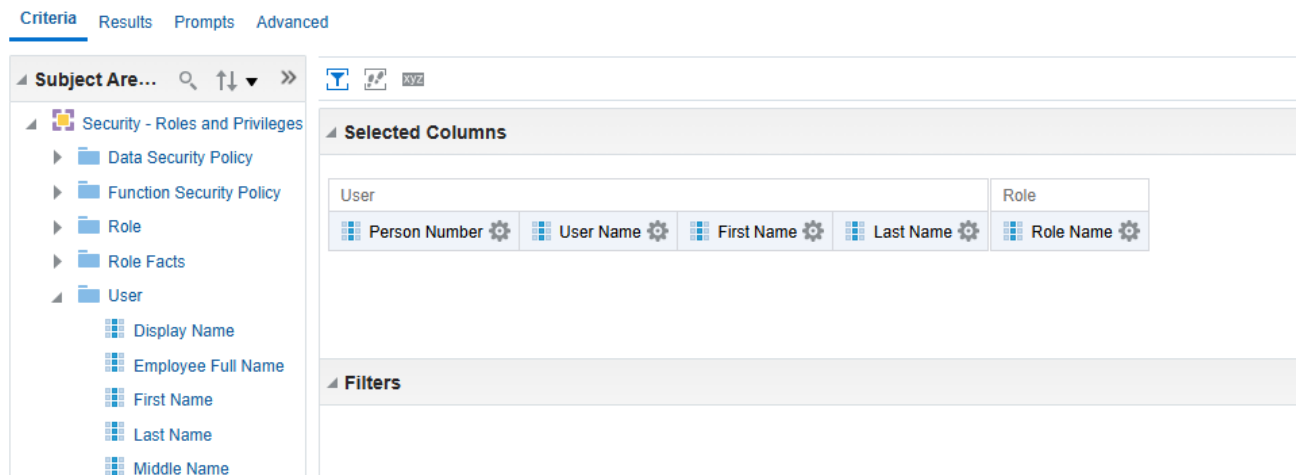
# OTBI – Creating an Analysis

- Select Subject Area



The screenshot shows the Oracle BI Catalog interface. The main area displays a list of folders and reports. A 'Select Subject Area' dialog box is open on the right, showing search results for 'Benefits - Action Items Real Time' and 'Benefits - Billing Real Time'. The dialog box includes a search bar and a list of results with brief descriptions.

- Field Selection



The screenshot shows the Oracle BI Catalog interface for field selection. The 'Criteria' tab is active, and the 'Subject Area' is set to 'Security - Roles and Privileges'. The 'Selected Columns' section shows a table with columns for 'User' and 'Role'. The 'User' column contains 'Person Number', 'User Name', 'First Name', and 'Last Name'. The 'Role' column contains 'Role Name'. The 'Filters' section is currently empty.

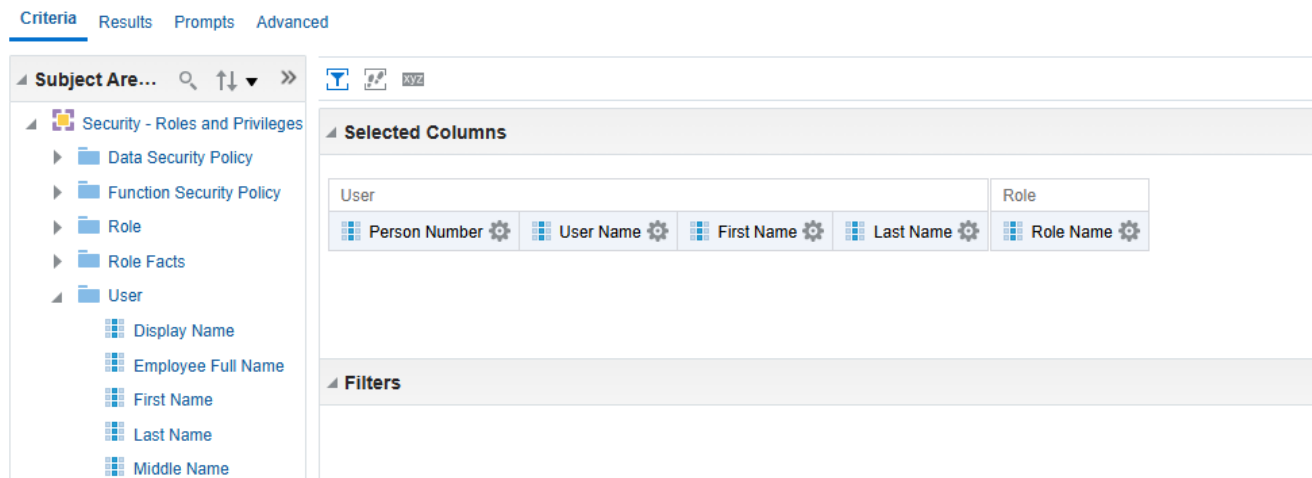
User	Role
Person Number User Name First Name Last Name	Role Name

# OTBI – Creating an Analysis

- Select Subject Area

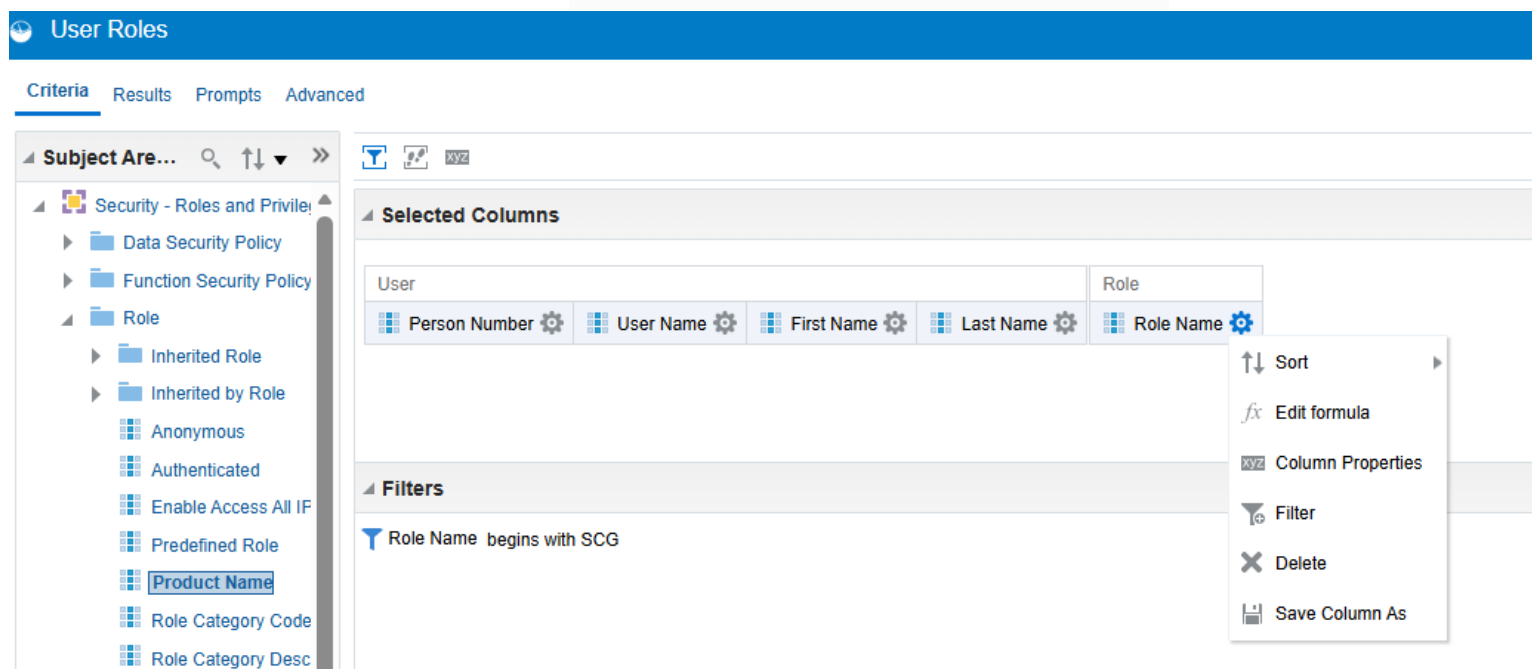


- Field Selection



# OTBI – Creating an Analysis

- Add Filter



The screenshot shows the Oracle BI 'User Roles' configuration page. The 'Criteria' tab is active, and the 'Subject Area' is set to 'Security - Roles and Privileges'. The 'Selected Columns' section displays a table with columns for 'User' and 'Role'. The 'Role Name' column is selected, and a context menu is open over it, showing options: Sort, Edit formula, Column Properties, Filter, Delete, and Save Column As. The 'Filters' section below shows a filter: 'Role Name begins with SCG'.

User	Role
Person Number	Role Name
User Name	
First Name	
Last Name	

**Filters**

- Role Name begins with SCG

# OTBI – Creating an Analysis

- Add Function

User

User	Role
<input type="checkbox"/> Person Number <input type="checkbox"/> User Name <input type="checkbox"/> First Name <input type="checkbox"/> Middle Name <input type="checkbox"/> Last Name <input type="checkbox"/> Role Name	

Filters

Role Name begins with SCG

### Edit Column Formula

Column Formula | Bins

Folder Heading: User

Column Heading: Middle Initial

Custom Headings

Aggregation Rule (Totals Row): Default (None)

Available

**Subject Areas**

- Security - Roles and Privileges
  - Data Security Policy
  - Function Security Policy
  - Role
  - Role Facts
  - User

Column Formula: LEFT("User" "Employee Middle Name", 1)

Buttons: f(...), Filter..., Column, Variable, +, -, x, /, %, (, ), ||

OK Cancel

# OTBI – Creating an Analysis

- Test Results

Criteria **Results** Prompts Advanced

Subject Area: Security - Roles and Privileges

- Data Security Policy
- Function Security Policy
- Role
- Role Facts
- User

Catalog

- My Folders
- Shared Folders

Compound Layout

Title: User Roles

Table

Person Number	User Name	First Name	Middle Initial	Last Name	Role Name
1	surya.shaw@shelbycountyttn.gov	Surya		Shaw	SCG SVS Level 1 ORGANIZATION:
10000	10000	ERIN	T	LAND	SCG Employee S
10002	10002	FREDDIE	J	BECKHAM	SCG Employee S SCG Line Manag Role
10007	10007	LASHERRIE		JEFFRIES	SCG Employee S
10008	10008	PAMELA	L	TAYLOR	SCG Employee S SCG Line Manag Role
10009	10009	KESHIA	M	HUMES	SCG Employee S
10014	10014	HOSIE	T	BURNETT	SCG Employee S
10016	10016	RANDALL	L	LANG	SCG Employee S
10018	10018	TERRY	E	TAYLOR	SCG Employee S
10020	10020	MICHELE	D	MACKLIN	SCG Employee S

Add to Briefing Book

# OTBI – Creating an Analysis

- Add Prompt

Criteria Results **Prompts** Advanced

**Definition**  
Add prompts for users when they run this analysis.

Prompt Label	Type	Prompt For	Description	Required	Column Prompt
Page 1	Page				
Person Number	Column value	Person Number		<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> <li>Person Number</li> <li>User Name</li> <li>First Name</li> <li>Middle Initial</li> <li>Last Name</li> <li>Role Name</li> <li>More Columns ...</li> </ul>

Page 1

Person Number

Display

Person Number

Apply Reset

**Edit Prompt:**

Prompt For Column "User"."Person Number" *fx*

Label Person Number  
 Custom Label

Description

Operator is equal to / is in

User Input Text Field

Options

OK Cancel

# OTBI – Creating an Analysis

- Advanced

Criteria
Results
Prompts
Advanced

```

<saaw:column xsi:type="saaw:regularColumn" columnID="c992bcb956a082822" >
  <saaw:columnFormula>
    <saaw:expr xsi:type="saaw:sqlExpression">"User"."User Name"</saaw:
  </saaw:columnFormula>
</saaw:column>

```

Bypass Oracle Analytics Presentation Services Cache

Partial Update Default

Apply XML

**SQL Issued**

The following box contains the SQL code that will be sent to the Oracle Analytics Server when this analysis is executed.

```

SELECT
  s_u,
  "Security - Roles and Privileges Real Time"."Role"."Role Display Name" s_1,
  "Security - Roles and Privileges Real Time"."User"."Employee First Name" s_2,
  "Security - Roles and Privileges Real Time"."User"."Employee Last Name" s_3,
  "Security - Roles and Privileges Real Time"."User"."Person Number" s_4,
  "Security - Roles and Privileges Real Time"."User"."User Name" s_5,
  LEFT("Security - Roles and Privileges Real Time"."User"."Employee Middle
  Name",1) s_6
FROM "Security - Roles and Privileges Real Time"
WHERE
  ("Role"."Role Display Name" LIKE 'SCG%')
ORDER BY 5 ASC NULLS LAST, 6 ASC NULLS LAST, 3 ASC NULLS LAST, 7 ASC NULLS LAST,
4 ASC NULLS LAST, 2 ASC NULLS LAST

```

**⚠ Important: If you create a new analysis using this SQL, any hierarchical columns, member selection, groups or formatting will be stripped.**

New Analysis

**Advanced SQL Clauses**

Use the following fields to include additional clauses in the SQL code for this analysis and to change the Subject Area or FROM clause. To add items to the projection list, use the Criteria tab.

**⚠ Important: You cannot use the fields in this section, except for the enabled fields, if the analysis includes hierarchical columns, member selections, or groups.**

DISTINCT  Issue an explicit Distinct

DIMENSIONALITY  Show Total value for all measures on unrelated dimensions.

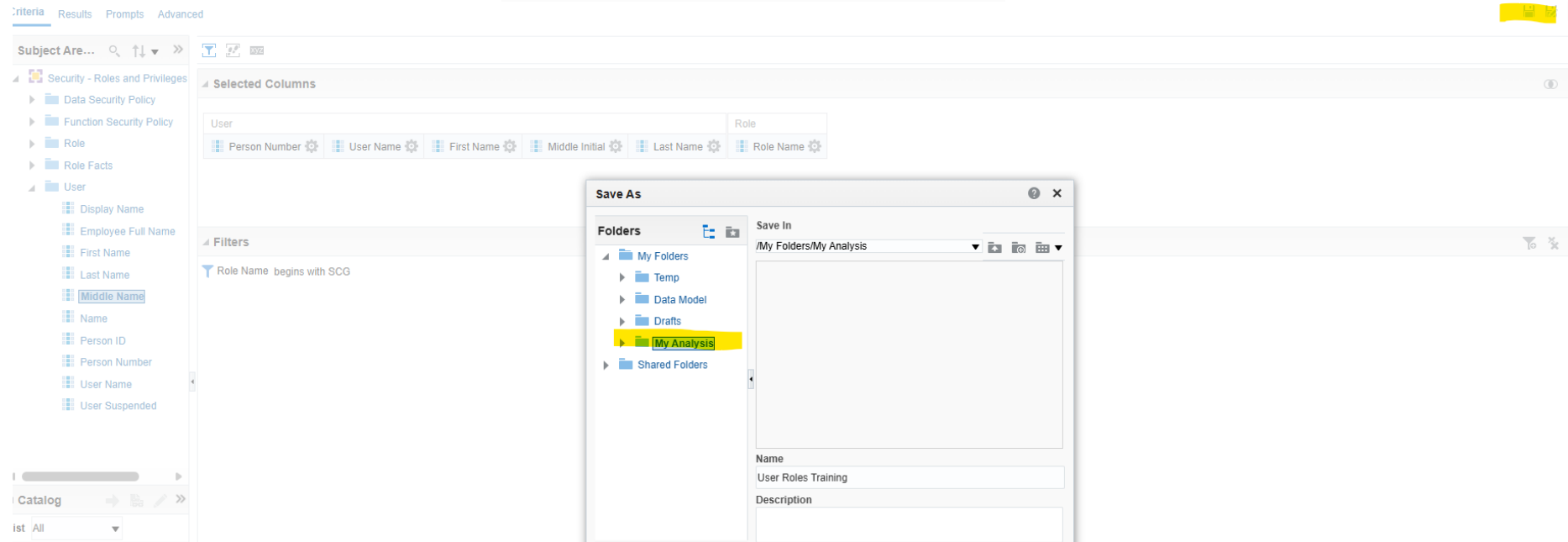
FROM Enter the name of the Subject Area

"Security - Roles and Privileges Real Time"

or Enter a complex from clause for these criteria.

# OTBI – Creating an Analysis

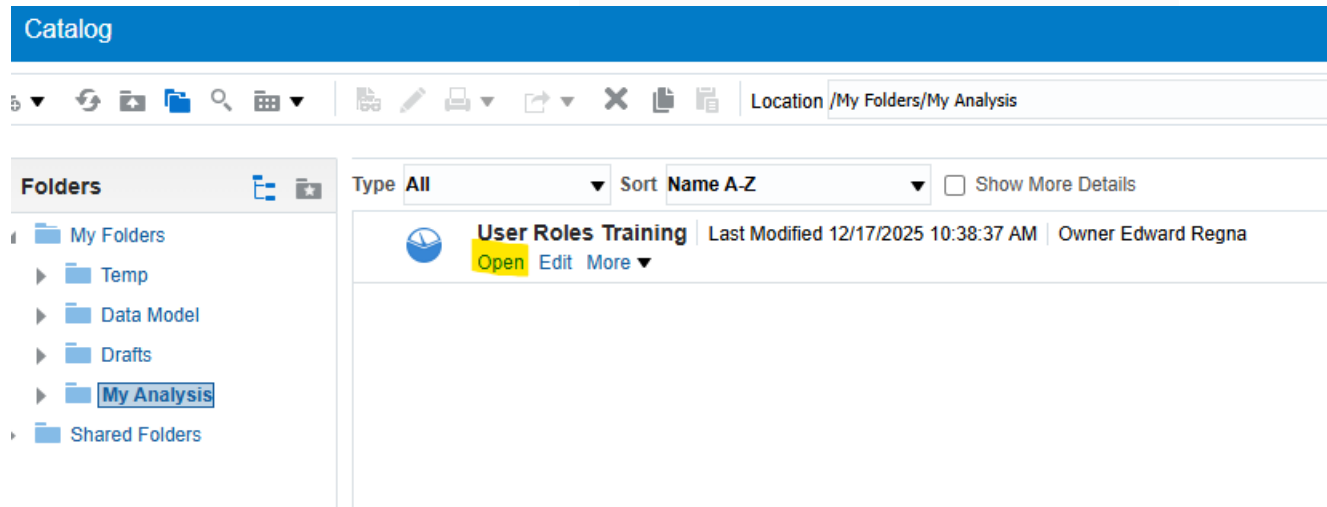
- Save



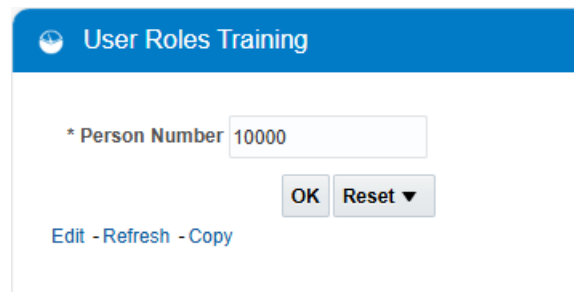
The screenshot displays the Oracle BI OTBI interface. The main window shows a subject area named 'User' with a list of columns including 'Person Number', 'User Name', 'First Name', 'Middle Initial', 'Last Name', and 'Role Name'. A filter is applied: 'Role Name begins with SCG'. A 'Save As' dialog box is open, showing a folder structure under 'My Folders' with 'My Analysis' selected. The 'Save In' field is set to '/My Folders/My Analysis'. The dialog also includes fields for 'Name' (containing 'User Roles Training') and 'Description'.

# OTBI – Creating an Analysis

- Test




The screenshot shows the Oracle BI Catalog interface. The top bar is blue and labeled "Catalog". Below it is a toolbar with various icons for navigation and actions. The "Location" field shows "/My Folders/My Analysis". On the left, a "Folders" pane shows a tree structure: "My Folders" (expanded), "Temp", "Data Model", "Drafts", "My Analysis" (selected), and "Shared Folders". The main area displays a list of items. The first item is "User Roles Training" with a clock icon, last modified on 12/17/2025 at 10:38:37 AM, and owned by Edward Regna. Below the item name are buttons for "Open", "Edit", and "More".



The screenshot shows the configuration dialog for the "User Roles Training" analysis. The title bar is blue and labeled "User Roles Training". The main area contains a text input field for "\* Person Number" with the value "10000". Below the input field are "OK" and "Reset" buttons. At the bottom, there are links for "Edit - Refresh - Copy".

# OTBI – Creating an Analysis

- Test Results

 User Roles Training

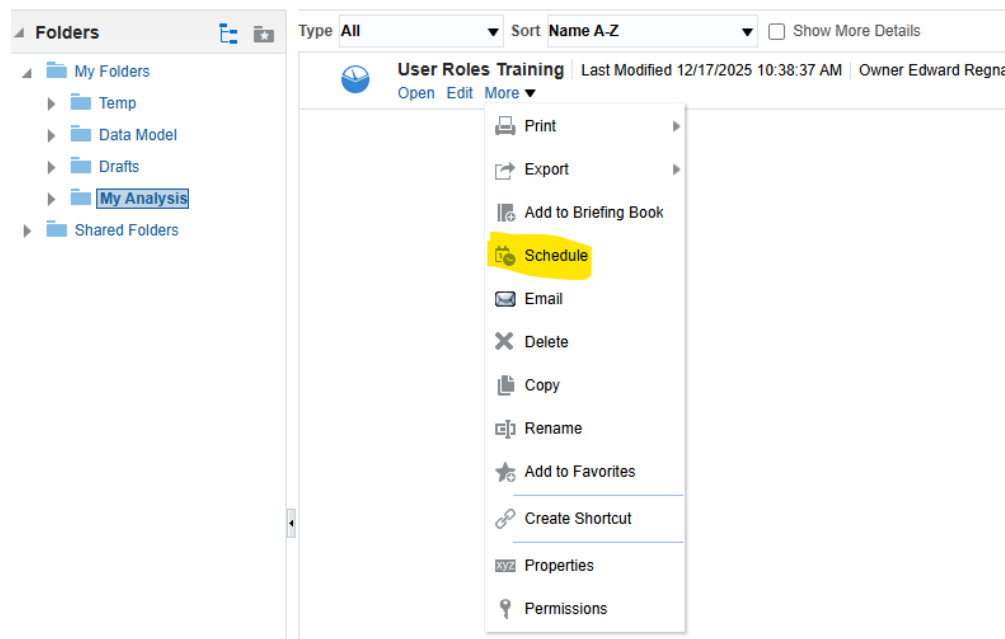
**User Roles Training**

Person Number	User Name	First Name	Middle Initial	Last Name	Role Name
10000	10000	ERIN	T	LAND	SCG Employee Self Service Abstract Role

[Edit](#) - [Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#) - [Email](#) - [Copy](#)

# OTBI – Creating an Analysis

- Scheduling



The screenshot displays the Oracle BI interface. On the left, a 'Folders' pane shows a tree structure with 'My Analysis' selected. The main area shows a report titled 'User Roles Training' with a context menu open. The 'Schedule' option is highlighted in yellow. The menu also includes options like Print, Export, Add to Briefing Book, Email, Delete, Copy, Rename, Add to Favorites, Create Shortcut, Properties, and Permissions. The report details at the top indicate it was last modified on 12/17/2025 at 10:38:37 AM by Edward Regna.

# OTBI – Creating an Analysis

- Scheduling

Untitled Agent

Overview

General Normal Priority, Use Agent Owner's Credentials  
Schedule Not Scheduled Recur weekly  
Condition User Roles Training  
Delivery Content /My Folders/My Analysis/User Roles Training

General **Schedule** Condition Delivery Content Recipients Destinations Actions

When do you want the Agent to be scheduled to run?

Enabled

Frequency Weekly  Every  Weeks

On  Sunday  
 Monday  
 Tuesday  
 Wednesday  
 Thursday  
 Friday  
 Saturday

Start 12/17/2025 10:55:00 AM

Re-run Agent Every  Minutes

Until 11:59:00 PM

End  No end date  Select end date



# Summary & Closing



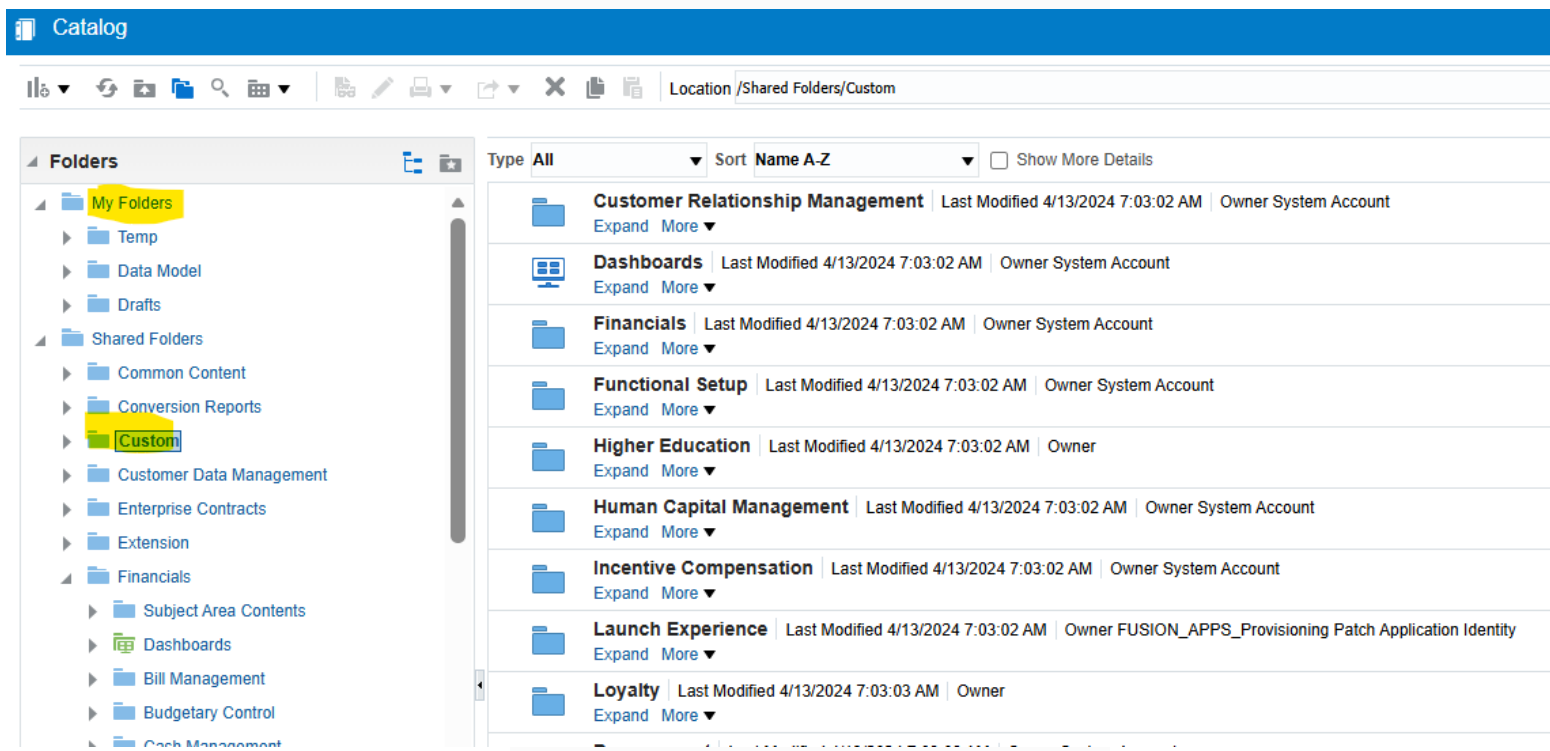
# Question & Answer Time

A scenic view of a large bridge at dusk over a river, with city lights visible in the foreground. The bridge is illuminated with warm lights, and the sky is a mix of blue and orange. The foreground shows a cityscape with buildings and trees.

# Oracle Reporting *BI Publisher Overview*

# Catalog Structure

- Folder Structures:
  - My Folder: Personal Area – Your own area for your development and Personal Use
  - Shared Folders: Seeded Folders and Custom Folders Available based on Security and Granted permissions
  - Custom Folder: Contains all custom Objects including Data Model, Reports, Analysis

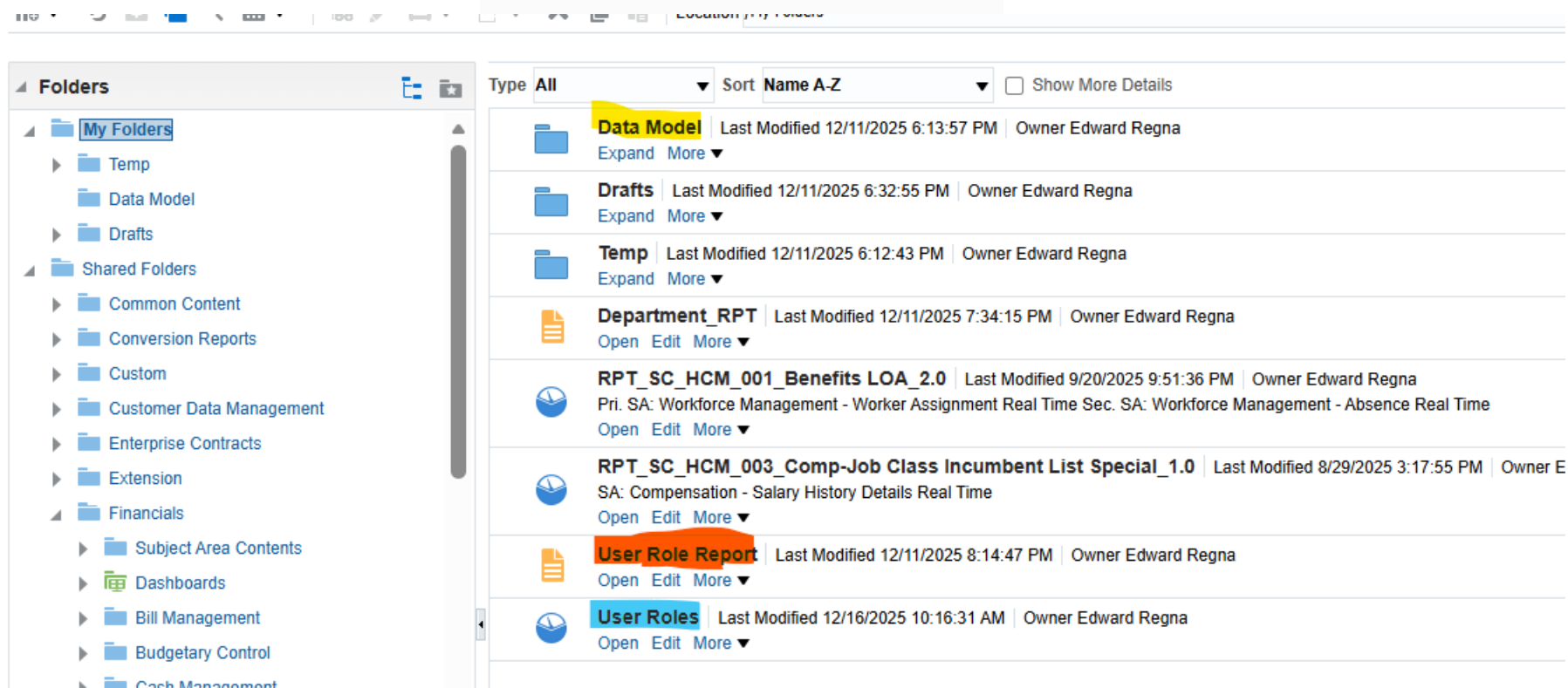


The screenshot displays the Oracle Catalog interface. The top navigation bar shows the 'Catalog' title and a location path of '/Shared Folders/Custom'. Below the navigation bar, there are icons for search, refresh, and other actions. The main content area is divided into two panels:

- Left Panel (Folders):** A tree view showing the folder structure. The 'My Folders' folder is highlighted in yellow, containing 'Temp', 'Data Model', and 'Drafts'. The 'Shared Folders' folder is also expanded, showing sub-folders like 'Common Content', 'Conversion Reports', 'Custom' (highlighted in green), 'Customer Data Management', 'Enterprise Contracts', 'Extension', 'Financials', 'Subject Area Contents', 'Dashboards', 'Bill Management', and 'Budgetary Control'.
- Right Panel (List):** A list of folders with columns for 'Type', 'Name', 'Sort', and 'Show More Details'. The list includes:
  - Customer Relationship Management** (Last Modified 4/13/2024 7:03:02 AM | Owner System Account)
  - Dashboards** (Last Modified 4/13/2024 7:03:02 AM | Owner System Account)
  - Financials** (Last Modified 4/13/2024 7:03:02 AM | Owner System Account)
  - Functional Setup** (Last Modified 4/13/2024 7:03:02 AM | Owner System Account)
  - Higher Education** (Last Modified 4/13/2024 7:03:02 AM | Owner)
  - Human Capital Management** (Last Modified 4/13/2024 7:03:02 AM | Owner System Account)
  - Incentive Compensation** (Last Modified 4/13/2024 7:03:02 AM | Owner System Account)
  - Launch Experience** (Last Modified 4/13/2024 7:03:02 AM | Owner FUSION\_APPS\_Provisioning Patch Application Identity)
  - Loyalty** (Last Modified 4/13/2024 7:03:03 AM | Owner)

# Catalog Structure

- Folder Objects:
  - Data Model: Contains Shared and Custom Data Models
  - Reports: Seeded and custom reports
  - Analysis: Seeded and Custom OTBI Analysis

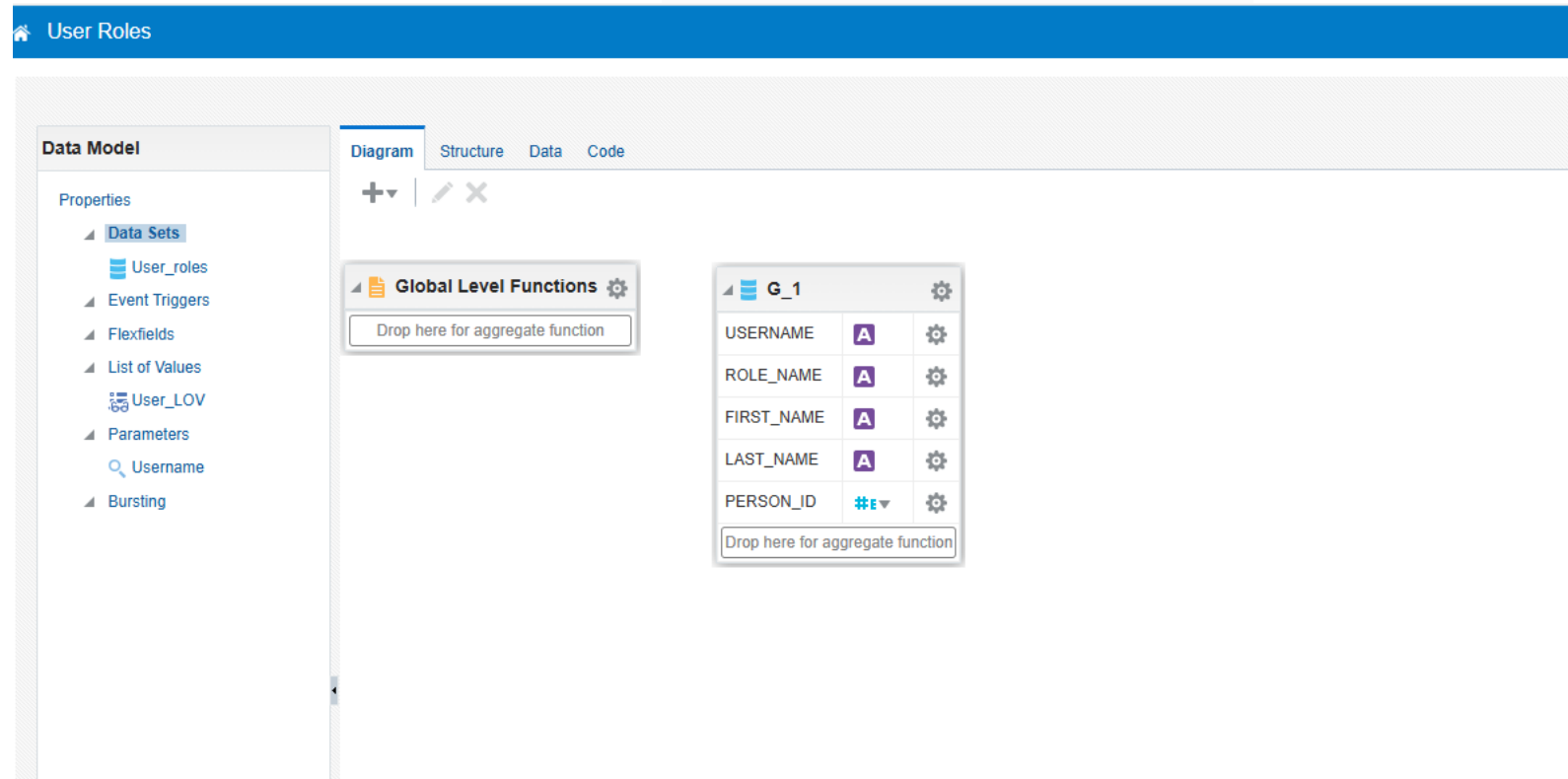


The screenshot displays the Oracle Cloud Catalog interface. On the left, a 'Folders' pane shows a tree structure under 'My Folders' and 'Shared Folders'. The main area shows a list of objects with columns for Name, Last Modified, and Owner. The 'Data Model' folder is highlighted in yellow, and the 'User Role Report' object is highlighted in orange.

Type	Name	Last Modified	Owner
Folder	<b>Data Model</b>	12/11/2025 6:13:57 PM	Edward Regna
Folder	<b>Drafts</b>	12/11/2025 6:32:55 PM	Edward Regna
Folder	<b>Temp</b>	12/11/2025 6:12:43 PM	Edward Regna
Report	<b>Department_RPT</b>	12/11/2025 7:34:15 PM	Edward Regna
Report	<b>RPT_SC_HCM_001_Benefits LOA_2.0</b>	9/20/2025 9:51:36 PM	Edward Regna
Report	<b>RPT_SC_HCM_003_Comp-Job Class Incumbent List Special_1.0</b>	8/29/2025 3:17:55 PM	Edward Regna
Report	<b>User Role Report</b>	12/11/2025 8:14:47 PM	Edward Regna
Report	<b>User Roles</b>	12/16/2025 10:16:31 AM	Edward Regna

# Data Model Design

- Basic Data Model



The screenshot shows the Oracle Data Model Design tool interface. At the top, there is a blue header bar with a home icon and the text "User Roles". Below this is a grey navigation bar with tabs for "Diagram", "Structure", "Data", and "Code". The "Diagram" tab is active, showing a workspace with two main components: "Global Level Functions" and "G\_1".

The "Global Level Functions" component is a box with a gear icon and a text input field containing "Drop here for aggregate function".

The "G\_1" component is a table with columns for field names, data types, and settings. It contains the following data:

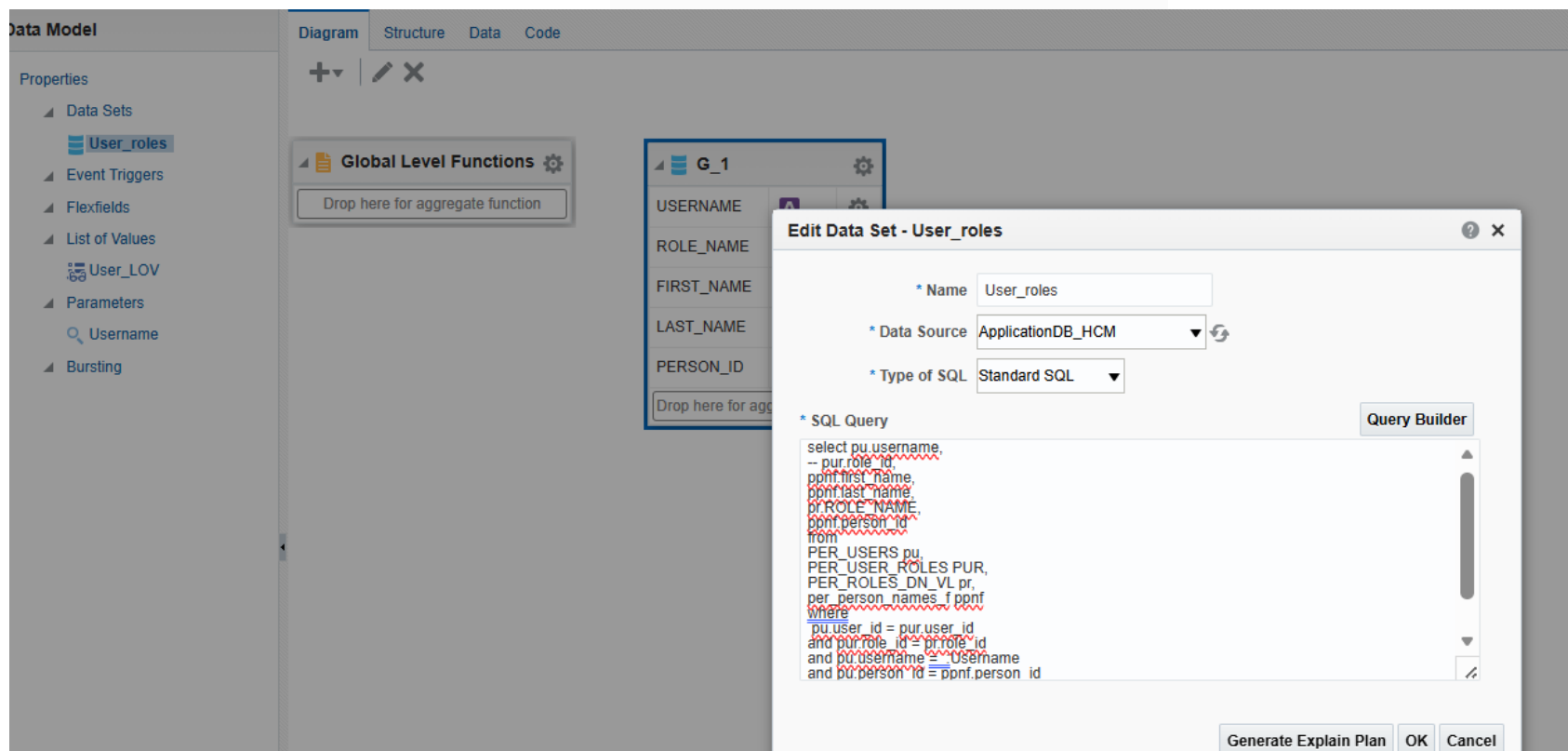
Field Name	Data Type	Settings
USERNAME	A	Settings
ROLE_NAME	A	Settings
FIRST_NAME	A	Settings
LAST_NAME	A	Settings
PERSON_ID	#E	Settings

Below the table is another text input field containing "Drop here for aggregate function".

On the left side, there is a "Data Model" sidebar with a "Properties" section. Under "Data Sets", there is a list of items: "User\_roles", "Event Triggers", "Flexfields", "List of Values", "User\_LOV", "Parameters", "Username", and "Bursting".

# Data Model Design

- Basic Data Model – Query



The screenshot shows the Oracle Data Model Designer interface. On the left, the 'Properties' pane is open to 'User\_roles'. The main workspace shows a 'Global Level Functions' area and a 'G\_1' group containing fields like USERNAME, ROLE\_NAME, FIRST\_NAME, LAST\_NAME, and PERSON\_ID. An 'Edit Data Set - User\_roles' dialog box is open, showing the following configuration:

- Name: User\_roles
- Data Source: ApplicationDB\_HCM
- Type of SQL: Standard SQL
- SQL Query:
 

```
select pu.username,
-- pur.role_id,
ppnf.first_name,
ppnf.last_name,
pr.ROLE_NAME,
ppnf.person_id
from
PER_USERS pu,
PER_USER_ROLES PUR,
PER_ROLES_DN_VL pr,
per_person_names f ppnf
where
pu.user_id = pur.user_id
and pur.role_id = pr.role_id
and pu.username = Username
and pu.person_id = ppnf.person_id
```

Buttons at the bottom of the dialog include 'Generate Explain Plan', 'OK', and 'Cancel'.

# Data Model Design

- Basic Data Model – List of Values

**Data Model**

Properties

- ▾ Data Sets
  - ▢ User\_roles
- ▾ Event Triggers
- ▾ Flexfields
- ▾ List of Values
  - ▢ User\_LOV
- ▾ Parameters
  - 🔍 Username
- ▾ Bursting

**List of Values**

+ X

*Name	Type	Data Source	Reorder
User_LOV	SQL Query ▼	ApplicationDB_HCM ▼	▲▼

---

**User\_LOV: Type: SQL Query**

Options  Cache Result

SQL Query Query Builder

Select username from per\_users

# Data Model Design

- Basic Data Model – Parameters

**Data Model**

Properties

- ▾ Data Sets
  - ▢ User\_roles
- ▾ Event Triggers
- ▾ Flexfields
- ▾ List of Values
  - ▢ User\_LOV
- ▾ Parameters
  - 🔍 Username
- ▾ Bursting

**Parameters**

+ ×

* Name	Data Type	Default Value	Parameter Type	Mandatory	Row Placement	Reorder
Username	String ▼		Search ▼	<input checked="" type="checkbox"/>	1	▲ ▼

---

**Username: Type: Search**

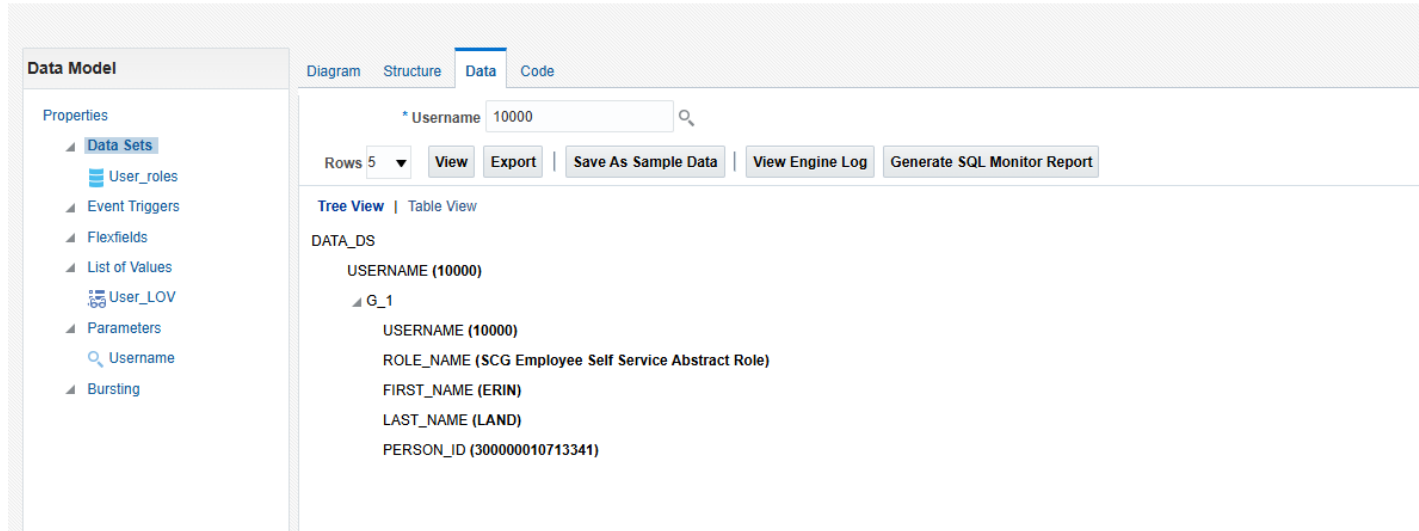
Display Label

List of Values  ▼

Refresh other parameters on change

# Data Model Design

- Basic Data Model – Data Preview

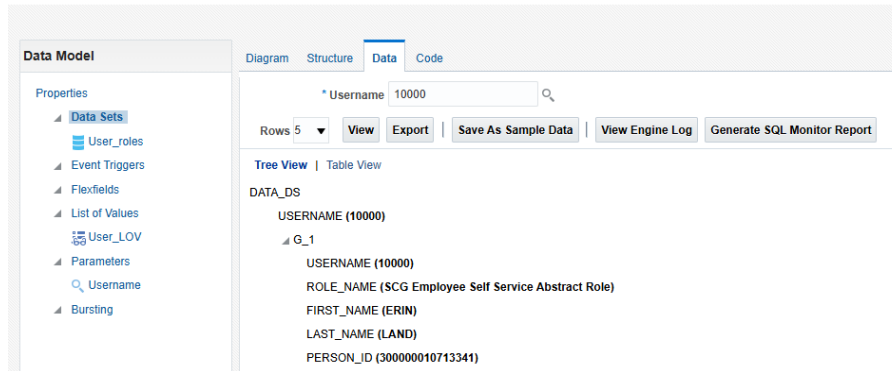


The screenshot shows the Oracle Data Model Designer interface. The 'Data' tab is selected, and the search criteria is set to '\* Username 10000'. The interface includes a 'Properties' pane on the left with a tree view of data sets, and a main area with a 'Tree View' and 'Table View' options. The 'Table View' shows the following data:

USERNAME (10000)
G_1
USERNAME (10000)
ROLE_NAME (SCG Employee Self Service Abstract Role)
FIRST_NAME (ERIN)
LAST_NAME (LAND)
PERSON_ID (300000010713341)

# Data Model Design

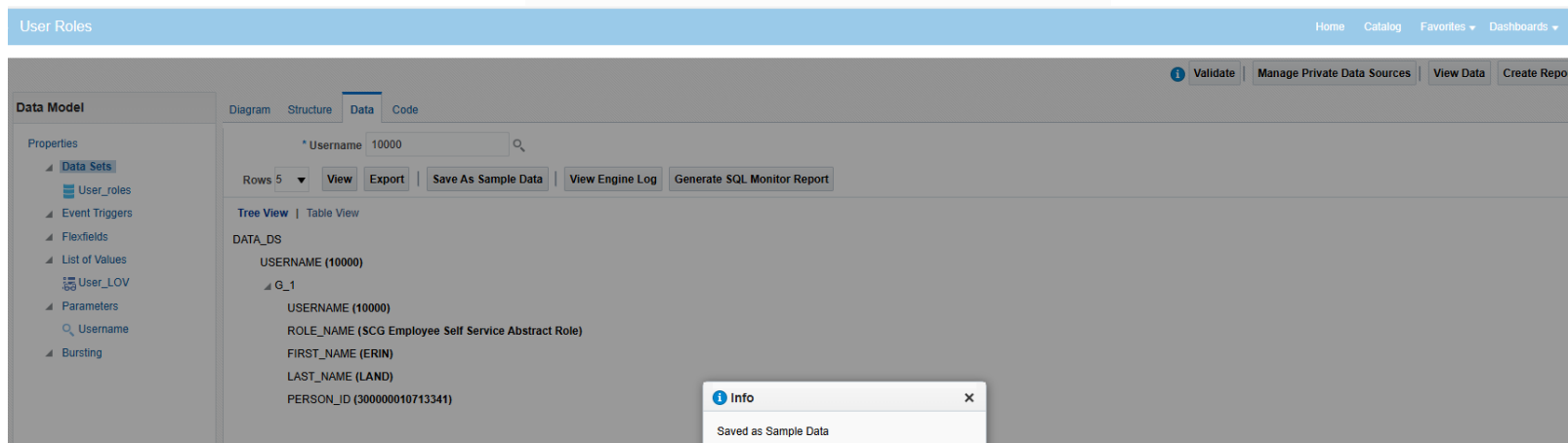
- Basic Data Model – Data Preview



The screenshot shows the 'Data Model' interface with the 'Data' tab selected. The left sidebar lists properties like 'Data Sets', 'User\_roles', 'Event Triggers', 'Flexfields', 'List of Values', 'User\_LOV', 'Parameters', 'Username', and 'Bursting'. The main area displays a search for '\* Username: 10000' and a table view showing the following data structure:

```

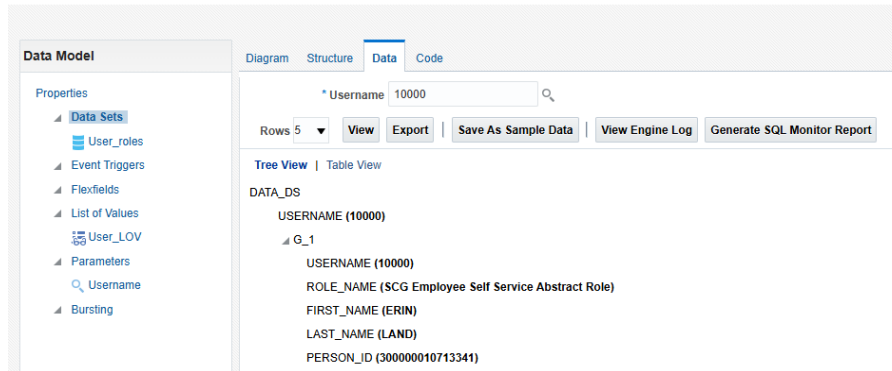
DATA_DS
  USERNAME (10000)
    G_1
      USERNAME (10000)
      ROLE_NAME (SCG Employee Self Service Abstract Role)
      FIRST_NAME (ERIN)
      LAST_NAME (LAND)
      PERSON_ID (300000010713341)
    
```



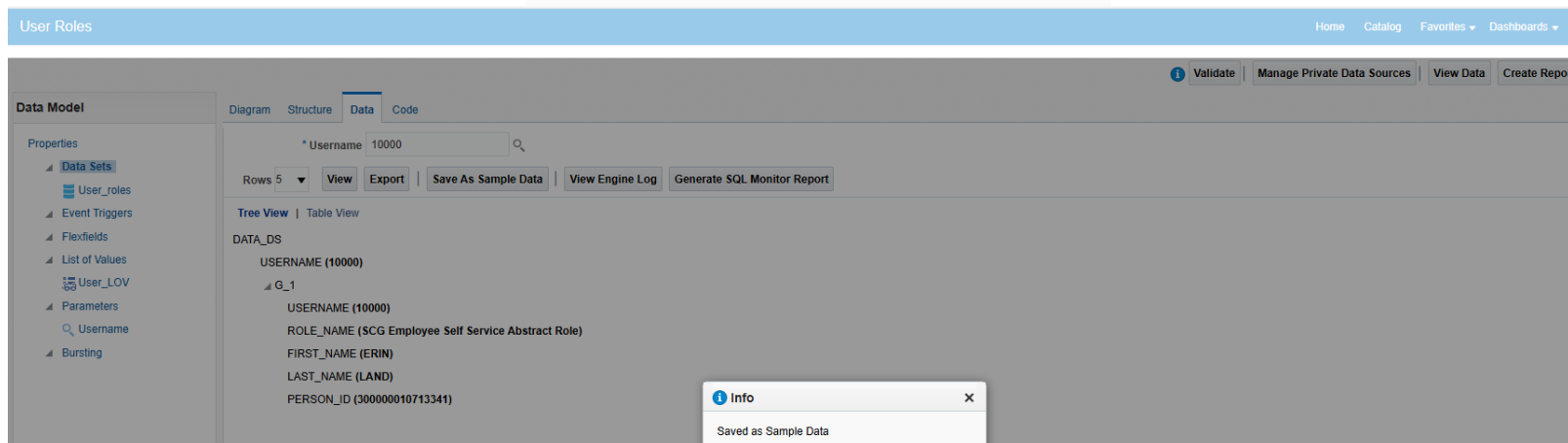
This screenshot shows the same 'Data Model' interface as above, but with an 'Info' dialog box open in the bottom right corner. The dialog box contains the text 'Saved as Sample Data'. The main interface shows the same search for '\* Username: 10000' and the same tree view of the data model.

# Data Model Design

- Basic Data Model – Data Preview



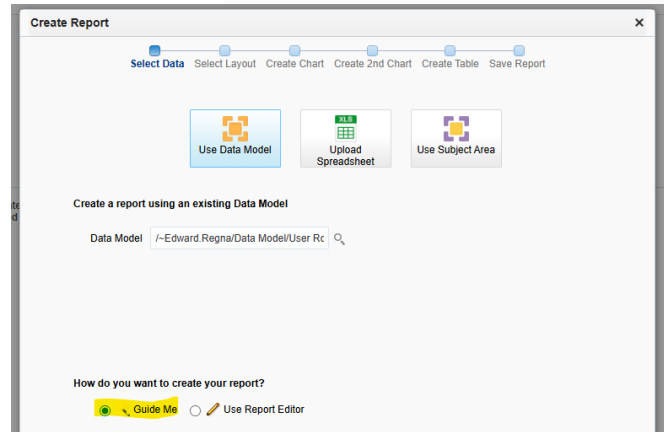
The screenshot shows the 'Data Model' interface with the 'Data' tab selected. The left sidebar lists 'Data Sets' with 'User\_roles' expanded. The main area shows a search for '\* Username: 10000' and a table view of the data set 'DATA\_DS'. The tree view shows a group 'G\_1' containing fields: USERNAME (10000), ROLE\_NAME (SCG Employee Self Service Abstract Role), FIRST\_NAME (ERIN), LAST\_NAME (LAND), and PERSON\_ID (300000010713341).



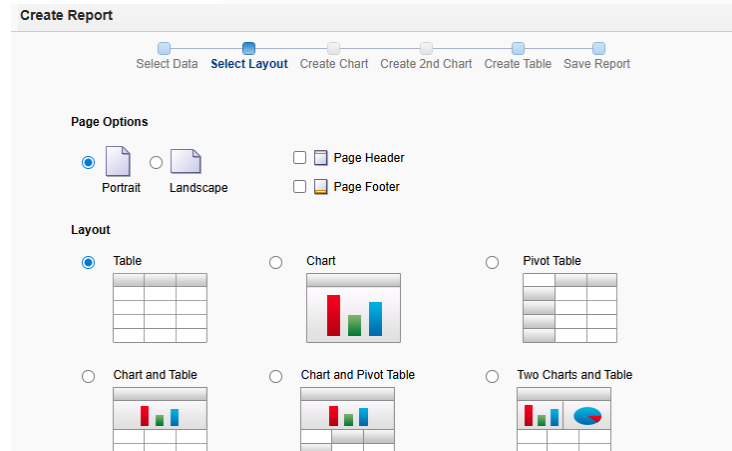
This screenshot is similar to the previous one but includes an 'Info' dialog box in the bottom right corner that says 'Saved as Sample Data'. The interface also shows navigation links like 'Home', 'Catalog', 'Favorites', 'Dashboards', and 'Create Report' at the top right.

# Create Report

- Report Definition



- Layout



# Create Report

- Field Selection

**Create Report** [X]

Select Data | Select Layout | Create Chart | Create 2nd Chart | **Create Table** | Save Report

Drag fields from the Data Source to create the table. Sample data is displayed.

**Data Source**

- DATA\_DS
  - Username
  - G\_1
    - USERNAME
    - ROLE\_NAME**
    - FIRST\_NAME
    - LAST\_NAME
    - PERSON\_ID

USERNAME	FIRST_NAME	LAST_NAME
10000	ERIN	LAND

# Create Report

- Save and Run

User Role Report

\* Username 10000

User Role Report

Draw

| 1 of 1 |  |

## User Role Report

USERNAME	FIRST_NAME	LAST_NAME	ROLE_NAME
10000	ERIN	LAND	SCG Employee Self Service Abstract Role

# Create Report

- Modify Output

Data Model User Roles 🔍 + Parameters Properties View Report 📄 🗑️ ⓘ

Layout Apply Style Template 🔍

Name	Template File	Type	Output Formats	Default Format	Default Layout	Apply Style Template	Active	View Online	Locale	Reorder
User Role Report	User Role Report.xpt	xpt	Interactive;HTML;P	PDF	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English (United States)	▲ ▼

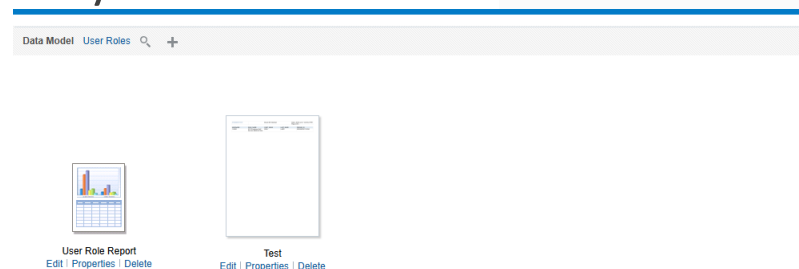
View Thumbnails View a list

Layout Apply Style Template 🔍

Name	Template File	Type	Output Formats	Default Format	Default Layout	Apply Style Template	Active	View Online	Locale	Reorder
User Role Report	User Role Report.xpt	xpt	Interactive;HTML;P	Excel (*.xlsx)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	English (United States)	▲ ▼

# Create Report

- Additional Layout - RTF



	<p>Oracle BI Publisher</p>	<p>Date:  <code>&lt;?xdoxslt:format_date(xdoxslt:current_date(\$ XDOLOCALE,\$ XDOTIMEZONE),'yyy-MM-dd','yyy-MM-dd',\$ XDOLOCALE,\$ XDOTIMEZONE)?&gt;</code>  <code>&lt;?xdoxslt:current_time(\$ XDOLOCALE,\$ XDOTIMEZONE)?&gt;</code>                  Page 1 Of 1</p>
--	----------------------------	--

USERNAME	ROLE_NAME	FIRST_NAME	LAST_NAME	PERSON_ID
G USERNAME	ROLE_NAME	FIRST_NAME	LAST_NAME	PERSON_ID E

# Create Report

- RTF Output

\* Username

User Role Report **Test**

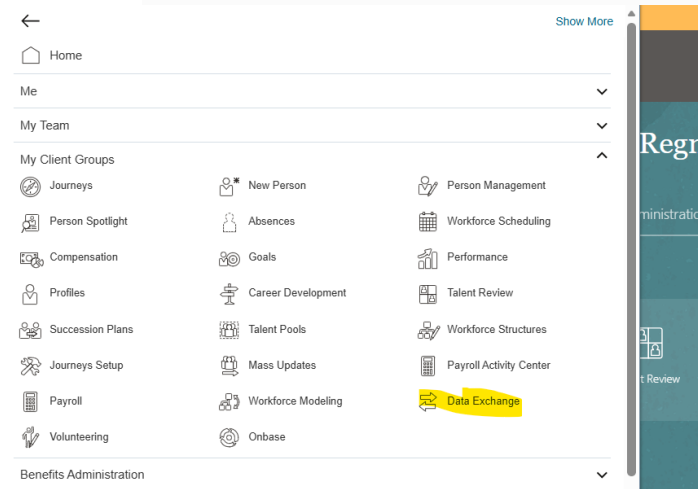
ORACLE	Oracle BI Publisher	Date: 2025-12-17 5:33:12 AM		
Page 1 Of 1				
USERNAME	ROLE_NAME	FIRST_NAME	LAST_NAME	PERSON_ID
14044	Customer Relationship Management Application Administrator	MATT	SHERRILL	300000010700157
14044	Compensation Manager	MATT	SHERRILL	300000010700157
14044	General Accounting Manager	MATT	SHERRILL	300000010700157
14044	Application Implementation Administrator	MATT	SHERRILL	300000010700157
14044	Grants Department Administrator	MATT	SHERRILL	300000010700157
14044	Benefits Manager	MATT	SHERRILL	300000010700157
14044	Application Implementation Consultant	MATT	SHERRILL	300000010700157
14044	Application Developer	MATT	SHERRILL	300000010700157
14044	Billing Manager Segregated Role	MATT	SHERRILL	300000010700157
14044	Advanced Procurement	MATT	SHERRILL	300000010700157

A scenic view of a large bridge at dusk over a river, with city lights visible in the foreground. The bridge is illuminated with warm lights, and the sky is a mix of blue and orange. The foreground shows a residential area with lit-up buildings.

# Oracle Reporting *HCM Extract*

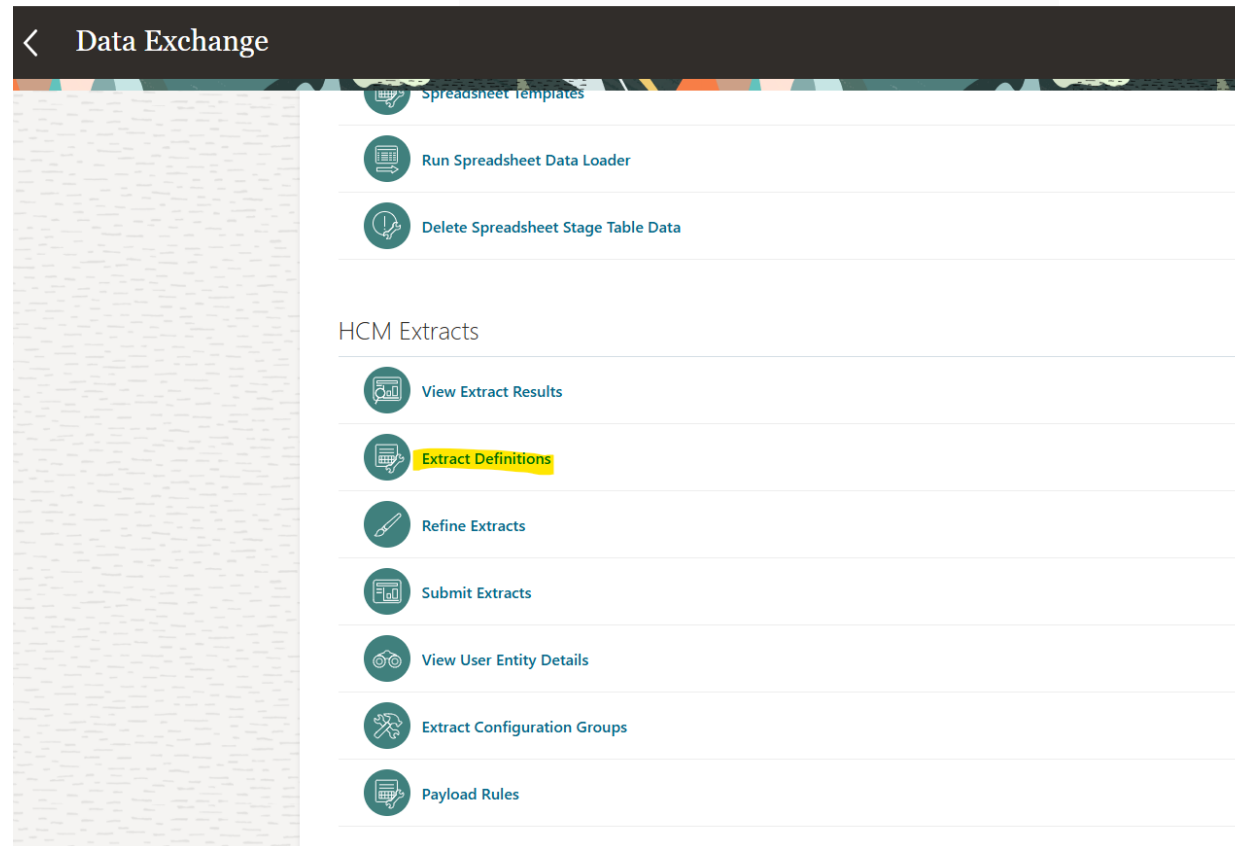
# HCM Extract

- Navigation
  - My Client Groups → Data Exchange



# HCM Extract

- Navigation
  - My Client Groups → Data Exchange → Extract Definitions



# HCM Extract

- Navigation
  - My Client Groups → Data Exchange → Extract Definitions

< Extract Definitions ?

Show Filters

+ ↓ Import

<span style="font-size: 18px;">🔒</span> <a href="#">SCG_HR_011_A_Shelby County Sheriff AD Hire Rehire Outbound Interface</a>	<b>Type</b> Full Profile <b>Last Saved</b> 11/25/25 3:25 PM
<span style="font-size: 18px;">🔒</span> <a href="#">SCG_HR_011_B_Shelby County Sheriff AD Termination Outbound Interface</a>	<b>Type</b> Full Profile <b>Last Saved</b> 12/3/25 10:28 AM
<span style="font-size: 18px;">🔒</span> <a href="#">SCG_HR_011_C_Shelby County Sheriff AD Changes Outbound Interface</a>	<b>Type</b> Full Profile <b>Last Saved</b> 11/25/25 3:28 PM
<span style="font-size: 18px;">🔒</span> <a href="#">SCG_HR_047_A_Shelby County Government AD Hire Rehire Outbound Interface</a>	<b>Type</b> Full Profile <b>Last Saved</b> 11/25/25 1:09 PM
<span style="font-size: 18px;">🔒</span> <a href="#">SCG_HR_047_B_Shelby County Government AD Termination Outbound Interface</a>	<b>Type</b> Full Profile <b>Last Saved</b> 11/25/25 2:32 PM
<span style="font-size: 18px;">🔒</span> <a href="#">SCG_HR_047_C_Shelby County Government AD Changes Outbound Interface</a>	<b>Type</b> Full Profile <b>Last Saved</b> 11/25/25 2:40 PM

# HCM Extract

- Extract Definition

SCG\_HR\_056\_457B Employee Demographic Outbound Interface: Define

Extract Attributes

Define

Design

Deliver

Preview

\*Tag Name: SCG\_HR\_056\_457B\_Employee\_Demographic\_Outl

Type: Full Profile

Status: Active

Valid: Valid

Lock Definition:

Changes Only: No

Consumer: Undefined

Additional Details: SCG\_HR\_056\_457B\_Employee\_Demogi

Description:

\*Unlock Comments: Extract Imported

Parameters

+ Add - Delete Show hidden parameters  Show Basic View

Name	Tag Name	Data Type	Display	Display Format	Lookup	Description
Effective Date	effective_date	Date	Yes			Effective Date

# HCM Extract

- Extract Design - Criteria

SCG\_HR\_o56\_457B Employee Demographic Outbound Interface: Design

Save Validate

Employee

Properties Filters Records

Effective Start Date	Filter Criteria Formula	Filter Criteria
1/1/00		

**Edit Filter Criteria Condition**

```

papf.person_number IN ('3219','3852','5318','5335','191','359','1167','6805','6964','26899','6063','24626','28','50','6805','19505','7837')
and
paaf.system_person_type IN ('EMP')
AND paaf.assignment_type IN ('E')
AND (
(paaf.assignment_status_type IN ('ACTIVE','SUSPENDED') AND ppos.actual_termination_date IS NULL)
OR (paaf.assignment_status_type = 'INACTIVE' AND ((pay_report_utils.get_parameter_value_date('EFFECTIVE_DATE'))-
ppos.actual_termination_date) <= 0)
)
AND (paaf.employment_category LIKE 'FR%' OR paaf.employment_category LIKE 'PT%' OR paaf.employment_category LIKE 'TW%' OR paaf.employment_category
LIKE 'DUR%')
AND paaf.primary_assignment_flag = 'Y'
AND paaf.effective_latest_change = 'Y'
AND TRUNC(pay_report_utils.get_parameter_value_date('EFFECTIVE_DATE')) between paaf.effective_start_date and paaf.effective_end_date
    
```

Basic Validate OK Cancel

# HCM Extract

- Extract Design - Attributes

SCG\_HR\_056\_457B Employee Demographic Outbound Interface: Define [?](#)

←

Define

Design

Deliver

Preview

**Object Name**

- Employee
  - Employee Details
- Payroll Relationship
  - Payroll Balance
  - Payroll Relationship Details
- Run Results
  - Run Results Details
- Work Relationship
  - Work Relationship Detail
- Address
  - Address Details
- Assignments
  - Assignment Details

Employee Details [?](#)

**⚠** To improve the performance of extracts, review the warning messages. [Show more](#)

Properties **Attributes**

+ Add    × Delete

Name	Type	Key Attribute	Description
Person First Name	Database item group		
Person Last Name	Database item group		
Person Middle Name	Database item group		
Person Name Suffix	Database item group		
Person Date of Birth	Database item group		
Person Gender	Database item group		
Person Marital Status	Database item group		
Assignment Relationship Actual Termination Date	Database item group		
Relationship Actual Termination Date	Database item group		
Work Term Relationship Actual Termination Date	Database item group		

# HCM Extract

- Deliver - Output

SCG\_HR\_056\_457B Employee Demographic Outbound Interface: Deliver ?

Extract Delivery Options ?

⚠ The None delivery option is used for testing the extract definition. You can distribute the extracted information by SFTP, email, fax, and other delivery modes.

Delivery Option Name	Start Date	End Date	Output Type	Report	Template Name	Output Name	Delivery Type	Re
Empower	1/1/00	12/31/12	Text	/Custom/Shelby County/HCM_Integrations/Core HR/SCG_HR_056_457B E...	SCG-HR-IFO-...	524783-01_Te...	FTP	
HR056	1/1/00	12/31/12	Text	/Custom/Shelby County/HCM_Integrations/Core HR/SCG_HR_056_457B E...	SCG-HR-IFO-...	524783-01_Te...	WebCenter C...	
XML	1/1/00	12/31/12	Data			XML	None	
XML data	1/1/00	12/31/12	Data			XML data	WebCenter C...	

Report Categories ?

# HCM Extract

- Output Template

**Format Setup:**

<TEMPLATE TYPE>	FIXED_POSITION_BASED
<OUTPUT CHARACTER SET>	iso-8859-1
<CASE CONVERSION>	Upper
<NEW RECORD CHARACTER>	Carriage Return

<LEVEL>	DATA_DS/G_1/G_2/FILE_FRAGMENT/SCG_HR_056_457B_Employee_Demographic_Outbound_Interface/Emp				
<POSITION>	<LENGTH>	<FORMAT>	<PAD>	<DATA>	<COMMENTS>
<NEW RECORD>	CLRDATA				
1	13	Alpha		'524783-01'	Plan Number(DEFAULT)
14	11	Alpha		Person_National_Identifier_Number	Employee SSN
25	20	Alpha		'5'	Division number
45	35	Alpha		Person_Last_Name	Last Name
80	20	Alpha		Person_First_Name	First Name
100	20	Alpha		Person_Middle_Name	Middle Name
120	15	Alpha		'	Name Suffix
135	10	Date		TO_DATE(Person_Date_of_Birth,'MM/DD/YYYY')	Birth Date
145	1	Alpha		Person_Gender	Gender
146	1	Alpha		Person_Marital_Status	Marital Status
147	35	Alpha		Extract_Address_Line1	Address Line 1
182	35	Alpha		Extract_Address_Line2	Address Line 2
217	20	Alpha		Extract_Address_Town_or_City	City
237	2	Alpha		Extract_Address_Region2	State



# Summary & Closing



# Question & Answer Time



Technology, Processes & People

- ❖ What's Next?
- ❖ Homework
  - ❖ Explore your Subject Areas
  - ❖ Build Simple Analysis
  - ❖ Check out more advanced techniques
- ❖ Support:  
[OneConnect.Help@shelbycountyttn.gov](mailto:OneConnect.Help@shelbycountyttn.gov)
- ❖ Complete Session Eval
- ❖ Adjourn

Thank You  
for your active  
participation  
in today's session!

# Oracle OneConnect

