

# ROLE SECURITIES

## in Procurement and Spend Analytics

JOSHUA NURKOWSKI



Oracle Business Intelligence Analytics (OBIA) is a resource tool for analytical reporting and metrics that provides customized dashboards and reports that give insight to supplier spend patterns. It enables users to identify supplier opportunities for cost savings and initiate sourcing events to improve on business objectives. This overview points out key benefits of using OBIA for role-based security and data-level security to obtain metrics and data within corporate procurement.

## What is OBIA in Procurement and Spend Analytics

OBIA is a package solution provided from Oracle and is the analytics functionality of OBIEE. It pulls data from Oracle E-Business Suite (EBS) and comes with pre-built, out-of-the-box reports with the ability to create custom, ad hoc reports. These reports can be created by a subject matter expert and saved in the library for anyone to access and run with the given parameters. Reports can also be created by the end user to fit their specific needs. The overall scope is to present data and information to business users in a meaningful way to improve leadership decision making to strategically align with company goals.

Procurement and Spend Analytics is one of five modules offered through OBIA. This module provides the ability to conduct comparative analysis and report on requested spend, committed spend, actual spend and receipts across functional business areas. It has the capacity to report in detail on suppliers, products, item categories, buying locations and associated hierarchies for both direct and indirect spend to allow complete visibility of spending across the organization.

## Benefits and Challenges

There are five out-of-the-box dashboards in Procurement and Spend Analytics that provide numerous reports and graphs to analyze data. If an out-of-the-box dashboard report does not suit the need of a business partner, there is a catalog of custom-created reports that may fit. There is also the capability to create a new ad hoc report.

Having several options, benefits from the data report include:

- Looking at spend patterns year over year for suppliers, departments, business segments and internal analysis.
- Reviewing supplier spend for possible contract negotiations and renegotiations as with buying power by pulling top spend suppliers.
- Tracking requisitions by requestor, PO spend and off PO spend as well as the status of requisitions.
- Monitoring buyers' cycle times, such as requisitions to PO and the workload of buyers through the number of requisitions processed.

As the data is refreshed nightly in OBIA, the time it takes to obtain needed data for a business partner is significantly reduced.

The major challenge to a user is the need for training. The common training challenges tend to be:

- Learning how to navigate from one dashboard to another and analyze the data.
- Knowing where to find the catalog of custom-created reports.
- Learning the data fields for creating custom reports.

## Benefits of Procure and Spend Analytics in OBIA

- Reduced time in reporting to business partners.
- Nightly data refresh for accurate reporting.
- Users self-enabled to view own data and not rely on business partner.
- Standard built reports to choose from in a catalog.

## Challenges

- Training, training and training.
- Learning how to navigate from dashboard to dashboard.
- Learning how to navigate to the Customer Reports folder.
- Learning the data fields for creating a custom report.

It is important to have training documents, videos, demonstrations and refreshers set in place to help users build their knowledge of OBIA.

## Reporting Dashboard

The created reports can be displayed in a multitude of ways depending on how the user wishes to present. The possibilities are numerous, whether it is in a table format or graph or chart. Choosing the best style is up to the presenter. Dashboards can be fully customizable to suit the needs of each report and can be fixed as the home page when a user first logs in. Parameters at the top can help to narrow down the data that is being obtained. The reports can be formatted to be exported and used to make strategic decisions (See Figure 1).

## Role Securities

A user accesses their OBIA responsibility through a single sign-on within their Oracle Applications home page. It is possible to create customized responsibilities within EBS that link the analytics functionality to various operating units.

# OBIA Dashboards

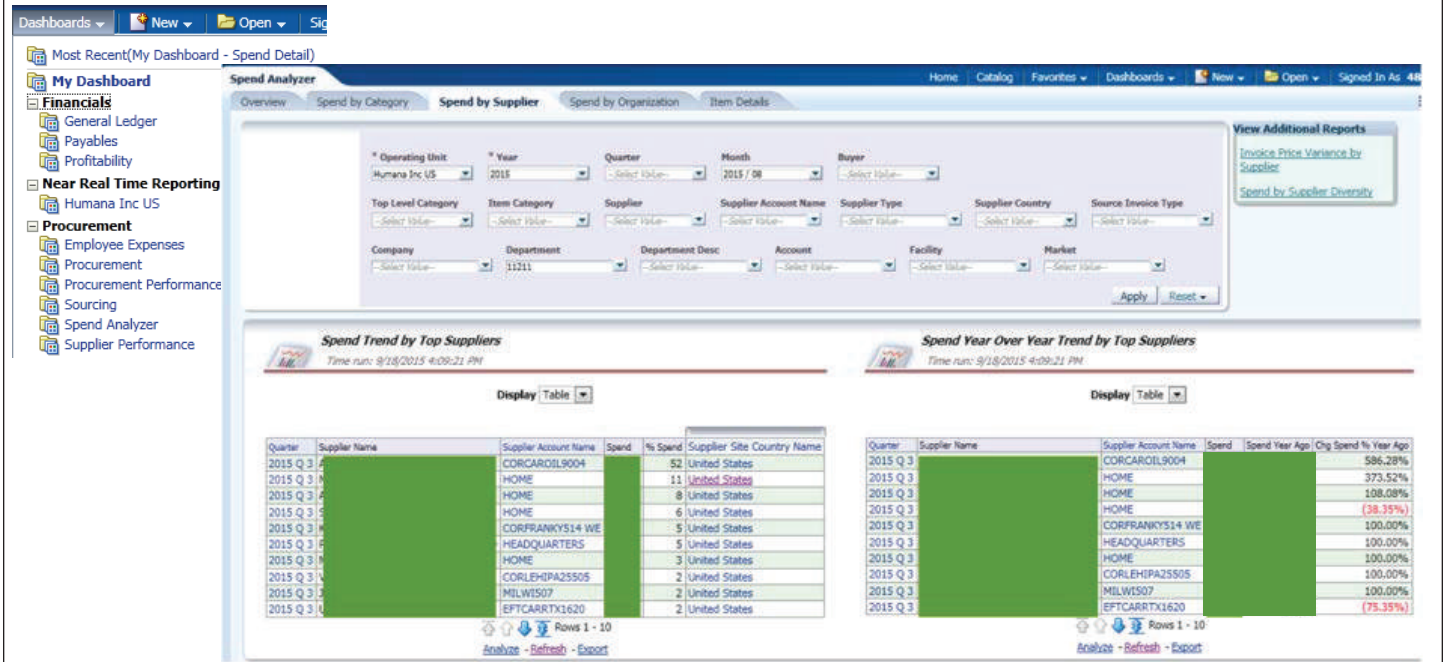


Figure 1:

My experience includes work on a project in which three levels of access were established (See Figure 2):

- A Base Role user would receive only the inquiry in the dashboard and access to the catalog of custom reports.
- A Report Writing Role would receive the Author Analysis as well as the Base Role responsibility. This role allows the user to create new reports and save the report in the catalog for a Base Role to use.
- The highest role is the Governance Role, which is an administrative level that provides access to a user of the previous two roles.

Assigning roles to users was based on existing access to EBS data. There are cases where new access may be needed when a super user is elevated to the Author Analysis role. ♦



Joshua Nurkowski is a graduate of Indiana University Kelley School of Business with a Bachelor of Science in Business majoring in Finance, Business Economics and Public Policy. He has more than five years' experience in the Health Care Industry with expertise in Oracle iProcurement, Oracle Business Intelligence Analytics and Enterprise Data Warehouse.

## Who gets access to do what? ...EBS Security Build Out

Customer responsibilities were created in EBS

Basis Role = Inquiry

Report Writing Role = Author Analysis

Government Role = Administrative Level

Figure 2: