

Supplier Spend Insights

AI Enabled Workbook

Version: 1.1

Date: Jul 1, 2026

This sample content is provided as part of the Oracle Fusion Data Intelligence (FDI) Content Library. It is intended to demonstrate analytics use cases, accelerate implementation, and provide examples of how customers can extend and customize Fusion Data Intelligence content. Customers should review and further adapt the example content to meet their specific business requirements.

Content Summary

This AI-enabled supplier spend insight analytics workbook helps users explore, analyze and refine spend insights using natural-language prompts. AI Agent included.

Business questions the AI agent can help answer:

Supplier Spend Analysis

- Show me the top 10 spend by Supplier for last month.
- Show me the supplier count by year.
- Show me spend by Supplier Country for the current year.

Spend Trends

- Show me the spend trend by period and supplier type for the last 12 months.
- Show me the period trend in spending for the last 2 years.

Category & Commodity Analysis

- Show me the top 10 spend by Purchasing Category.
- Which top 10 items contribute most significantly to procurement expenses for the current year?
- Are there any instances of spending by category that exceed the predefined 10 million threshold for the current year?
- How much did the organization spend on various commodities in global currency for the current quarter?

Procurement Compliance & Agreements

- How much is PO Matched vs. Non-PO Matched Spend for the last 12 months?
- How much is Negotiated vs. Non-Negotiated Spend for last month?
- Show me the breakdown by value of Agreement, Non-Agreement, and Agreement Leakage Spend for this year.
- Which Business Unit has the highest Non-Agreement Spend for last year?
- Which Business Unit has the highest Non-Negotiated Spend for the current quarter?

Spend Analysis

- How much is the average spend per invoice by year?
- Show me Spend by Account for this year.
- How much is Spend by Company for the last 12 months?
- Show me Spend by Cost Center for the last 12 months.

Organizational Analysis

- Show me the buyer count.
- Which region or location has the highest spend for the current year?

Package Artifacts

- **Workbook(s):** Supplier Spend Insights - AI Enabled
- **Local Subject Area:** Procurement - Spend LSA
- **AI Agent:** Procurement Spend AI Agent

Prerequisites

- **Fusion Data Intelligence Release:** 26.R2 or higher
- Ensure the relevant FDI application and functional areas are activated in your FDI instance
 - **Application:** Fusion SCM Analytics or Fusion ERP Analytics
 - **Functional Area:** Procurement Spend
- User has permissions to import workbooks and agents

Installation

1. Download the package to your local machine.
2. Extract the ZIP file.
3. Sign in to Oracle Analytics.
4. On the navigation menu, click **Catalog**
5. Click on a folder to import to or create a new folder
6. Click **Page Menu**  and click **Import Workbook/Flow**.
7. In Import Workbook/Flow, click **Select File**, select the **DVA file** that was extracted from the zip file
8. Select **Import Permissions** and click **Import**.
9. If prompted that a dataset with the same name already exists, verify that it is not an existing local subject area you want to retain, then click **OK** to proceed with the import.
10. In the Import successful message, click **OK**.
11. Verify that a catalog folder was created with the imported Workbook(s), Local Subject Area (LSA) used by the AI Agent, and an AI Agent.
12. After import, run the initial index for the Local Subject Area (LSA) using the following steps.

Note: Until indexing completes, the AI Agent responses may be unavailable or incomplete. If the index is not run manually, it will be created automatically during a later background process.

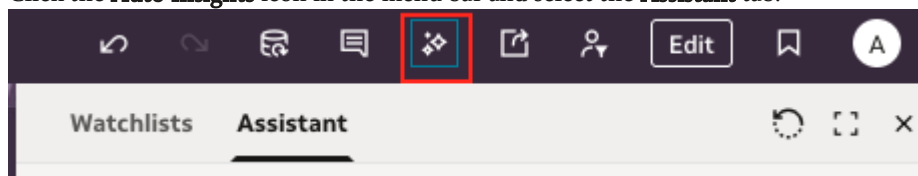
- a. Right click the Local Subject Area and select **Inspect** from the popup menu
- b. Click on the **Search** menu item and click on the **Run Now** button.
- c. Click on the **Check Now** link to check if the index run is complete

Using the Content

1. Open the workbook.
2. Review the workbook dashboards, and set the appropriate filters for optimal performance
3. To use the AI Agent attached to this workbook, follow these steps:
 - a. Ensure you are in the workbook **Present Mode** which is configured to use the indexed curated local subject area. For consumer users, workbooks open in Present mode by default.

Note: The AI Agent can be used from the workbook opened in **Present Mode**, where it uses the curated, indexed Local Subject Area (LSA). The AI Agent is not available when the workbook is opened in **Edit Mode**. Instead, the Assistant in Edit Mode generates responses from the workbook's uncurated subject area, which may differ from the curated responses provided by the AI Agent in Present Mode. For the best experience, use the AI Agent from the workbook in Present Mode.

- b. Click the **Auto Insights** icon in the menu bar and select the **Assistant** tab.



- c. After opening the AI Agent, a welcome message should appear indicating that it is ready to assist with questions.
- d. Ask a question to the AI Agent using the provided sample business questions. The AI Assistant generates answers, visualizations, and follow-up recommendations based on the indexed Local Subject Area (LSA) and the underlying Agent.

Note: The **Ledger Type Name** and **Fiscal Calendar Name** dashboard filters are automatically applied to AI Agent queries, ensuring responses reflect the user's current dashboard context and filter selections. The filters passed to the AI Agent can be customized to meet your business needs—existing passed filters can be removed or additional dashboard filters can be passed to further refine the AI-generated responses.

4. Perform basic sanity checks to ensure data validity before you roll out workbooks to business users and analysts.

Version History

Version	Date	Change
1.0	Jun 15, 2026	Initial Release
1.1	Jul 1, 2026	Added About canvas to workbook; Update Readme

How to Get Help

To ask questions, stay informed about updates, or participate in discussions about this sample content, visit the Oracle Analytics Community post.

Disclaimer

This content is provided as a sample to help guide your analysis. While it reflects common use cases, it should be reviewed and adapted to fit your specific requirements. This sample content is intended solely for demonstration, evaluation, and educational purposes. Customers are responsible for validating all calculations, metrics, filters, prompts, and outputs before using the content in production environments or for business decision-making.

The sample content may require modification to align with your organization's configurations, business processes, security policies, and reporting standards. Compatibility and performance may vary depending on enabled functional areas, customizations, data volumes, and application versions.

For AI Agent sample content, generated responses may vary and should be reviewed for accuracy and appropriateness before business use. AI-generated insights should not be considered authoritative without human review.

Customers should conduct appropriate testing, validation, and governance reviews before promoting sample content to production use, including validating data quality, user security access, indexing behavior, query performance, and workbook optimization practices.

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