

Oracle OTBI

Hands-on Workshop Student's Lab Book 1

ORACLE
CLOUD SOLUTIONS

Oracle Operational BI
Partner Workshop
PTS Workshop
Platform Technology Solutions

ORACLE

Copyright © 2014 Oracle and/or its affiliates. All rights reserved. | Oracle Confidential – Internal/Restricted/Hipmly Restricted

Labs Contribution

Farzin Barazandeh

Jignesh Mehta

Lucian Dinescu

Bill Creekbaum

Mauricio

Jack Berkowitz

OTBI & SaaS PMs

Copyright and Disclaimer Notice

All the contents here in the document are copyright property of Oracle. By accessing this material you agree to not distribute or resale any of the contents from this document.
© 2018 Oracle.

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
USA

Worldwide inquiries:
Phone: +1 650 506 7000
Fax: +1 650 506 7200

www.oracle.com

Oracle is the information company

Oracle is a registered trademark of Oracle Corporation.
Various product and service names referenced herein may be trademarks of Oracle Corporation. All other product and service names mentioned may be trademarks of their respective owners.

Copyright © 2018 Oracle Corporation

All rights reserved.

ORACLE®

Table of Contents

Contents

Lab 1: Oracle Transactional Analytics Overview	5
OBIEE.....	6
OTBI.....	6
BI Publisher	7
OBIA: The Industry's Most Complete Strategic Analytics Application Solution	8
Comparison of Reporting Tools	8
Advantages of OTBI	9
Advantages of BI Publisher	9
Reports and Analytics Navigation	16
Lab 2: Working with OTBI Analytics (Oracle HCM Cloud)	19
2.1 Introduction: Accessing Reports and Analytics	20
2.2 Accessing Reports and Analytics.....	21
2.3 Creating an OTBI Analysis Using BI Composer	24
2.4 Creating an OTBI Analysis Using Oracle Business Intelligence Answers	30
2.5 Creating a Cross- Subject Area Analysis	36
2.6 Creating a Data Model	42
2.7 Creating a BIP Report	47
2.8 Briefing Book Activity.....	55
2.9 Creating an Agent	51
Lab 3: Working with OTBI Analytics (Oracle ERP Cloud)	55
3.1 Accessing OTBI Reports.....	55
3.2 Use the BI Composer Activity	58
3.3 Create an Analysis, View, and View Selector Activity.....	62
3.4 Copy Dashboard, Add View, and Edit Prompt Activity	69
3.5 Create a Dashboard and Prompt Activity	68
Lab 4: Working with OTBI Analytics (Oracle Sales Cloud)	76

4.1 Accessing and Navigating OTBI Reports	76
4.2 Examining Dashboard Infolets.....	85
4.3 Add an Infolet to the Dashboard.....	86
4.4 Embedding Analytics	95
4.5 Creating a Custom Analysis	103
4.6 Exploring Historical Trending	112
4.7 Custom Subject Areas.....	121
4.8 Navigating from one Report to another Report.....	134
4.9 Navigating from a Report to an Object Page.....	143
4.10 Scheduling a Report	150
4.12 Creating a Cross-Subject Area Report with a Common Dimension.....	156
4.13 Creating a Cross-Subject Report with a Local Dimension.....	159
4.14 Using Set Operations to Combine Result Sets	162

Lab 1: Oracle Transactional Analytics Overview

Oracle Business Intelligence offers a complete, integrated solution that generates and delivers analyses for Oracle Fusion Applications.

The Oracle Business Intelligence platform is an enterprise-class platform for all modes of analysis and information delivery, including dashboards, ad hoc analysis, online analytical processing (OLAP), predictive analytics, and enterprise reporting. You can access information through multiple channels, such as web-based user interfaces, industry standard portals, mobile devices, and the Microsoft Office Suite of applications. You can push information to users through notifications, or embed it within business process workflows. Oracle Business Intelligence simplifies systems deployment and management through integrated systems management capabilities.

Oracle Business Intelligence products integrated with Oracle Fusion Applications includes:

- **Oracle Business Intelligence Enterprise Edition (OBIEE)**
- **Oracle Transactional Business Intelligence (OTBI / Operational Analytics)**
- **Oracle Business Intelligence Publisher (BI Publisher)**
- **Oracle BI Applications (OBIA / Strategic Analytics)**

Throughout this lesson, **analyses** will refer to queries that you create in **OTBI**, and **reports** will refer to **BI Publisher** queries.

OBIEE

Oracle Business Intelligence Enterprise Edition (OBIEE) is a comprehensive set of enterprise business intelligence tools and infrastructure that includes:

- Scalable and efficient query and analysis server
- Ad hoc query and analysis tool
- Tools to allow users to create and manage interactive dashboards
- Tools to allow users to create and manage proactive intelligence and alerts
- Enterprise reporting engine (integration with BI Publisher)

Oracle Business Intelligence Answers enables you to create and maintain OTBI and OBIA analyses.

OTBI

Oracle Transactional Business Intelligence (OTBI) is:

- A business intelligence semantic layer that is built using OBIEE
- Based on Fusion data structures
- Allows users to run seeded sample reports and to create their own reporting solutions using OBIEE or BI Composer

Constructed analyses are executed in real time against the transactional schema, which is supported by a layer of view objects.

BI Publisher

Oracle Business Intelligence Publisher (BI Publisher) is an enterprise reporting solution for authoring, managing, and delivering reports from multiple data sources in multiple formats through multiple channels.

BI Publisher can be used as an alternative reporting solution to OTBI.

The following data sources are available:

- SQL Query
- MDX Query
- Oracle BI Analysis
- View Object
- Web Service
- LDAP Query
- XML File
- Microsoft Excel File
- CSV File
- HTTP (XML Feed)
- Oracle Endeca Query

OBIA: The Industry's Most Complete Strategic Analytics Application Solution

- Oracle Business Intelligence Applications (OBIA) is a complete, prebuilt Enterprise Analytics for HCM, ERP, SCM & CX; provides Strategic view of Business

OBIA can analyze the history and trends of transactional data.

OBIA uses Oracle Business Analytics Warehouse, a unified data repository for all customer-centric data, used to support the analytical requirements of Oracle Business Intelligence Applications. OBIA supplies the warehouse database schema and the logic that extracts data from the Oracle Fusion Applications transactional database and loads it to the warehouse. Oracle Fusion Applications end users interact with the information in Oracle Business Analytics Warehouse using Oracle BI Enterprise Edition components (such as Answers and Dashboards).

OBIA is an additional license.

Comparison of Reporting Tools

The following figure compares the reporting tools available to Oracle Fusion HCM Cloud Service customers:

Feature	OTBI	BIP	Extracts	OBIA
Target Users	Managers and Analysts	Analysts	Analysts, HR, Payroll	Managers and Analysts
Content Breadth	High	Complete	HR, Payroll	High
Ease of Use	Simple	Moderate	Advanced	Simple
Number of Features	High	High	Medium	High
Real Time	Yes	Yes	Yes	No
Cloud	Yes	Yes	Yes	No**

*

Note: Extracts are not covered in this class, but are included here for comparison purposes.

OBIA Flexible Deployment options

- Cloud: powered by Oracle PaaS & BI Cloud Service
- On-Premise: powered by OBIEE
- Hybrid options where needed

Advantages of OTBI

OTBI has the following advantages:

- Usability
- Integrated with Fusion
- Real-time information
- Available for both Cloud and On-Premises customers
- Capability to report on descriptive and extensible flexfields
- Scheduling
- Uses Fusion security
- Mobile

Advantages of BI Publisher

BI Publisher has the following advantages:

- Data sources (SQL, XML, OTBI, OBIA)
- Complete content breadth
- Cloud and on-premises
- Cross HR-queries
- Headcount and salary trend reports
- Flex
- Scheduling

Note: With BI Publisher, you have the ability to query unsecured Fusion tables. This can be seen as both an advantage and disadvantage. When developing a BI Publisher report, you can choose whether or not to retrieve data that is subject to data security restrictions. You do this by using (or ignoring) the secure list views, which are covered in the BI Publisher lesson.

Sometimes a report developer will want to bypass data security, but you should limit who has access to do this.

Fixed-Format Reporting

One advantage of BI Publisher reports over OBI EE Answers is that you can print BI Publisher reports on standard templates, also known as fixed format sheets.

In the example below, you want to print monthly pay slip details of an employee in a certain format. You have the following requirements for the report:

Column Headers or titles such as Worker Name, Overtime Hours, Gross Salary, and so on must appear on certain sections in the report.

Using the RTF template builders, the fixed formatted style sheets or templates are created along with the placeholders for the respective values.

When you run the report, the values are printed on the pre-formatted templates. You can modify and reuse the templates.

The following figure illustrates the report.

Company

Pay Slip

Company Address
Phone: 555-555-55555
Fax: 123-456-49165955
Write Your Website here
Write Your Email Address Here

Company
Logo Here

Name of Employee: _____

Period of Payment: _____

Scale of Payment:

Description	Days	Description	Amount (\$)
Standard Working Days in a Month	_____	Basic Pay for a Month	000000.00
Standard Working Hours on Daily Basis	_____	Daily Pay Rate	0000.00
Training Rate	_____	Pay Rate Per Hour	000.00

Computation of Gross Salary to be Paid for This Month:

Hours worked by employee & holidays	_____	Salary to be paid on daily basis	0000.00
Hours of overtime	_____	Salary of overtime working	000.00
Overtime in holidays	_____	Salary for holiday overtime	000.00
Hours of total night shifts	_____	Pay for total night hours	000.00
Total paid leaves	_____	Salary for all paid leaves	000.00
		Total of Gross Salary	0000000.00

Break Up of Deductions for the Month

Contribution for social security	_____
Contribution for health insurance	_____
Contribution for housing insurance	_____
Amount of withholding tax	_____
Total Deductions	00000.00
Net Salary	000000.00

Prepared By:	_____	Received BY:	_____
--------------	-------	--------------	-------

Pay Slip Template

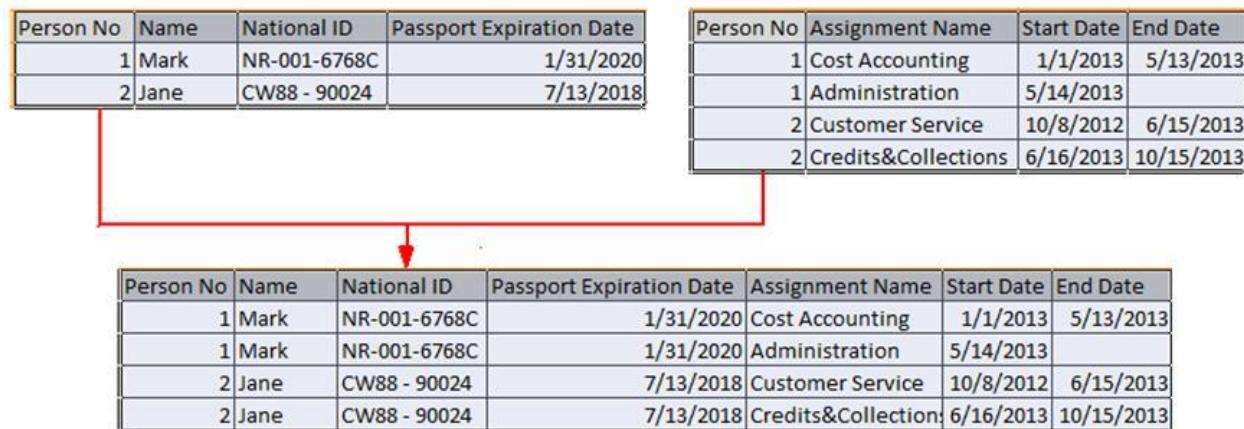
Join Data Sets

OTBI Answers provides a simple reporting tool to report on data fields from a pre-defined reporting data model. However, you can't change how data sets are joined or define a new data set in Answers.

You may want to join data sets from across different subject areas that are not easily joinable in the Answers subject areas. With a BI Publisher data model, you can join data sets from different subjects with a user-specified join condition.

For example:

Prior to Release 8, you couldn't join the Person Real Time subject area with any other HR subject areas. With BI Publisher, you can create a data model that fetches data sets from the Person and the Assignment subject areas respectively and join the two data sets on the common key, Person Number.



Report Bursting

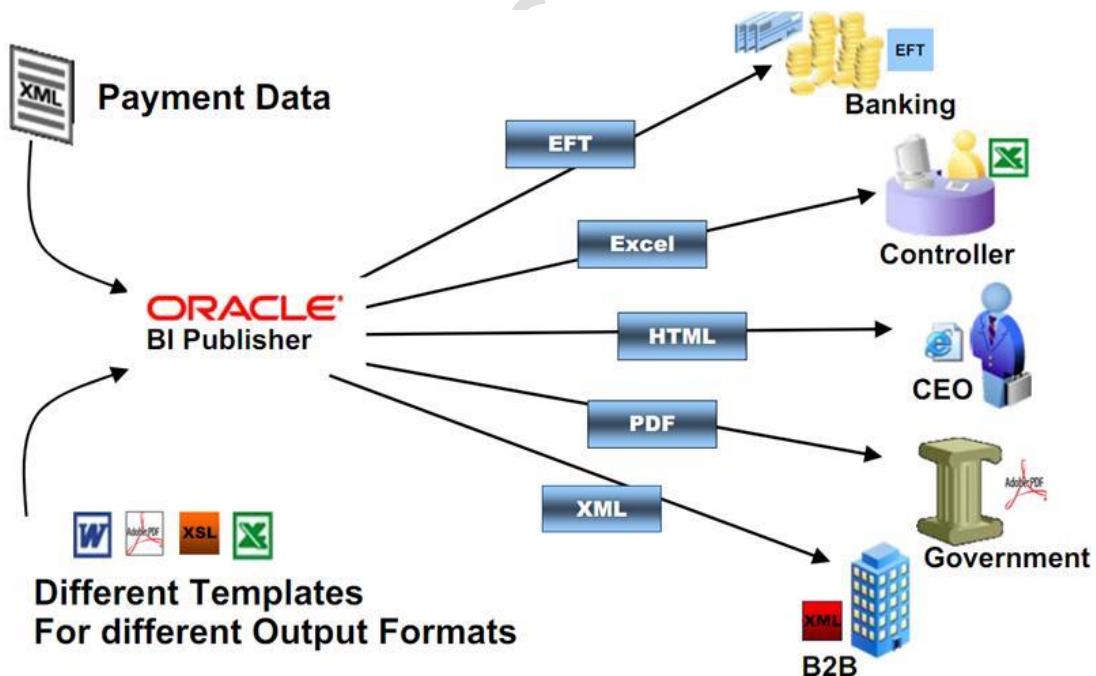
Report bursting enables you to separate a single report with personalized content to multiple output formats and destinations on a scheduled basis.

For example, you can create a single BI Publisher data model to address the following reporting requirements:

- The budget amounts allotted to the line managers with the breakup on their direct reports.
- The total budget amount with the breakup on Business Unit to be consumed by HR Managers with details of each earnings and deductions.

BI Publisher enables you to define different reporting formats and store them in the database tables.

Multiple bursting records can be created in a single data model, and then you can schedule the reports to be delivered based on specific format and data to different individuals and destinations.



Report Logic and Layout Control

BI Publisher Data models and templates enable you to have finer control of the report logic and layout, which may be difficult to achieve in OBI EE Answers.

You can create a BI Publisher data model with a physical SQL that queries Fusion data directly. However, this is not a recommended approach as this requires you to be familiar with Fusion data models, and the report may be impacted during upgrades, and have performance impacts.

You can use a BI Publisher template to create fixed-format reports with OTBI subject area as the data source.

For example: You require a compensation report that must combine employee performance distribution with total budget for the department. In OBI EE Answers, the budget amount metric must be moved to the rows in the pivot table to avoid the metric being dimension by Performance Rating, and this results in the totals not being computed for metrics outside the measures .

This figure illustrates the report created in OBI EE Answers, with the grand total not being calculated for overall total budget and total eligible workers.

				Ratings			
				10	20	30	40
Manager Name	Employee Name	Overall Budget Amount	Total Eligible Workers				
Manager-1	Worker-1	2,341.014	3	3			
	Worker-2	8,679.55	13			13	
	Worker-3	13,448.663	19				19
	Worker-4	6,592.99	9	9			
	Worker-5	16,407.281	20				20
	Worker-6	17,110.719	23		23		
Grand Total				12	23	13	39

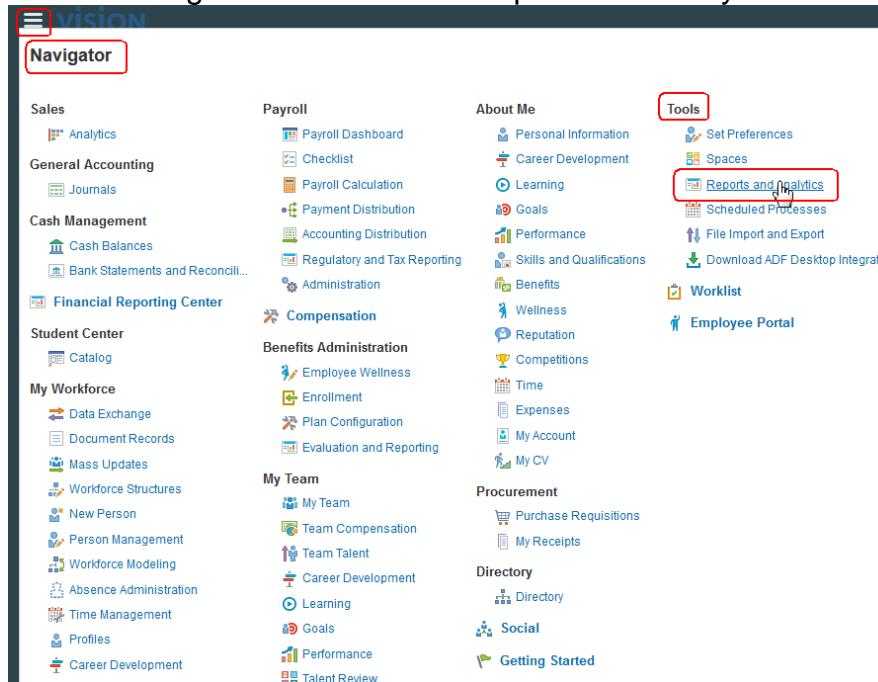
This figure illustrates the same report created in BI Publisher, with the grand total calculated.

				Ratings			
				10	20	30	40
Manager Name	Employee Name	Overall Budget Amount	Total Eligible Workers				
Manager-1	Worker-1	2,341.014	3	3			
	Worker-2	8,679.55	13			13	
	Worker-3	13,448.663	19				19
	Worker-4	6,592.99	9	9			
	Worker-5	16,407.281	20				20
	Worker-6	17,110.719	23		23		
Grand Total		64,580.216		87	12	23	13
							39

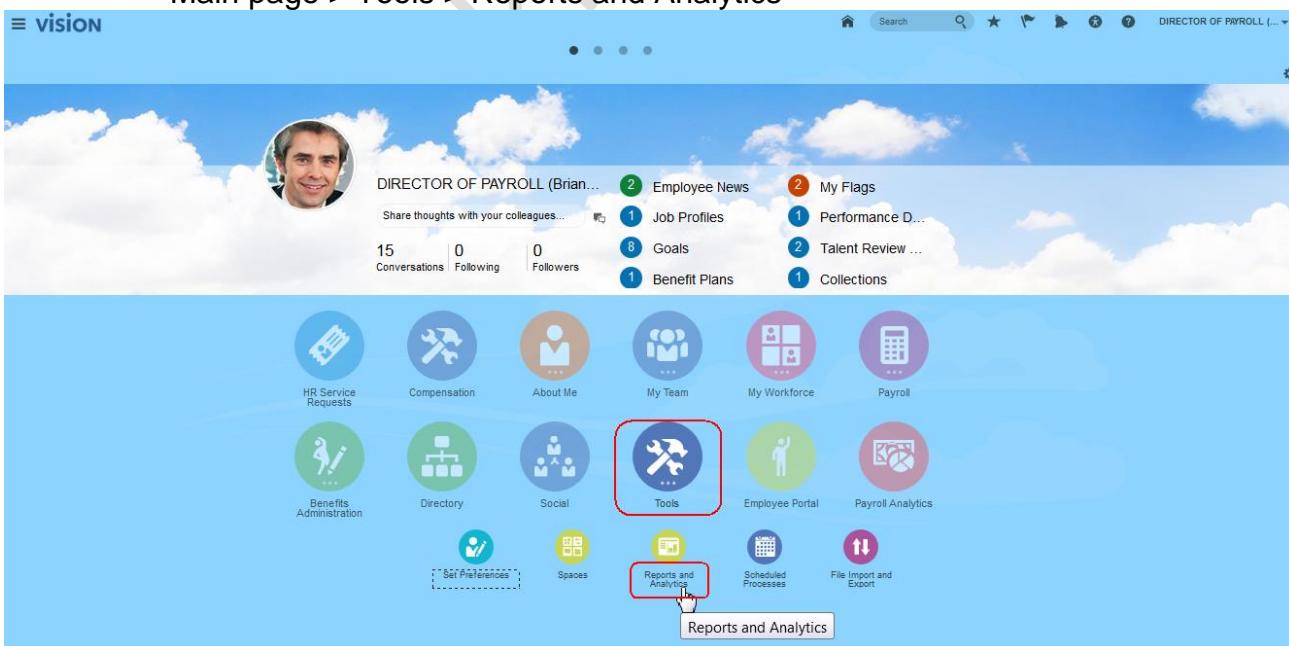
Reports and Analytics Navigation

You can access the Oracle Fusion reporting tools from:

- Navigator menu >Tools>Reports and Analytics



- Main page > Tools > Reports and Analytics



Reports and Analytics Pane

The Reports and Analytics pane provides a central place for you to quickly view or run any operational or analytical analysis or report relevant to your work. You can also create a new report or analysis and access Oracle Business Intelligence Answers.

The pane is available in work areas across Oracle Fusion Applications, and contains links to reports specific to the work area.

Each link in the Reports and Analytics pane is generically referred to as a report or analytic and represents a mapping to an object in the Oracle Business Intelligence (BI) Presentation Catalog. The catalog contains reports and analyses in Oracle Fusion Applications and presents them in an organized hierarchy. Links with the Report type are BI Publisher content, and those with Analysis type are OTBI or OBIA. Many other object types are available, but these are the most common.

Reports and analyses can be mapped to one or more folders for the Reports and Analytics pane, therefore:

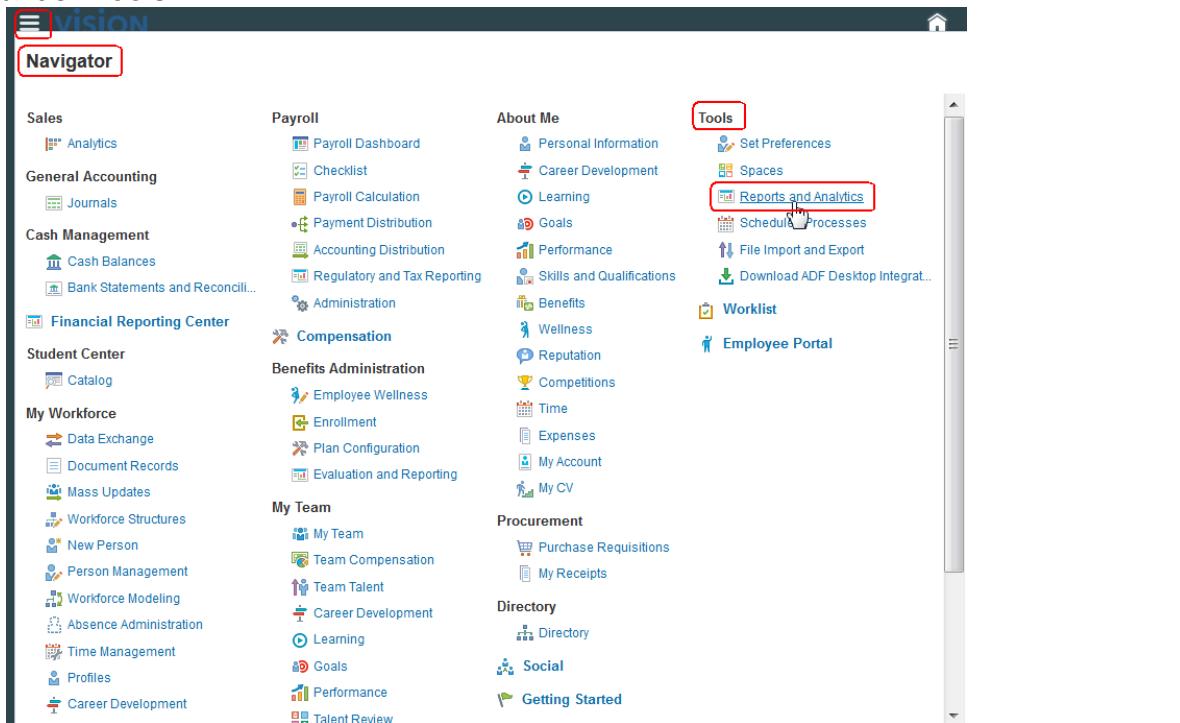
- You might see the same report or analysis in different work areas.
- You can have multiple instances of the same report or analysis in one work area, but with different parameters.

In the Reports and Analytics work area, you can have:

- Links to the same report or analysis in multiple folders
- Multiple instances of the same report or analysis in the same folder, but with different parameters.

Reports and Analytics Work Area

You can also access the Reports and Analytics work area from the Navigator menu, under Tools.



Considerations During Upgrades

When you apply a patch or perform an upgrade, all of the contents contained within folders in Shared Folders are overwritten, with the exception of the Custom folder.

Therefore, if you do not want reports and analyses that you create to be overwritten, you should save them to the Custom folder. You can also save them to My Folders. The contents of My Folders are not overwritten.

Lab 2: Working with OTBI Analytics (Oracle HCM Cloud)

Note: All of the reports created in these activities are to be saved in a new **xx Lab** subfolder within **Shared Folders > Custom**

(C) PTS, Oracle

2.1 Introduction: Accessing Reports and Analytics

Background

In this activity, you will familiarize yourself with the reports and analytics that are available from the Reports and Analytics pane and access the Reports and Analytics work area.



Requirements

You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

Activity Scope

Sign in as **Brian.Joseph**,

Use the same password given to you for your student id (FASxx.Student**).**

Note: all users Brian.Joseph / Casey.Brown / Anita.Kennedy / Lisa.Jones **share the same (FASxx.Student) password**

Access the Reports and Analytics pane of the Human Resources dashboard, and then locate the Reports and Analytics link from the Navigator menu.

Activity Note: Lesson Activities

For all activities in this lesson, students should use the following user

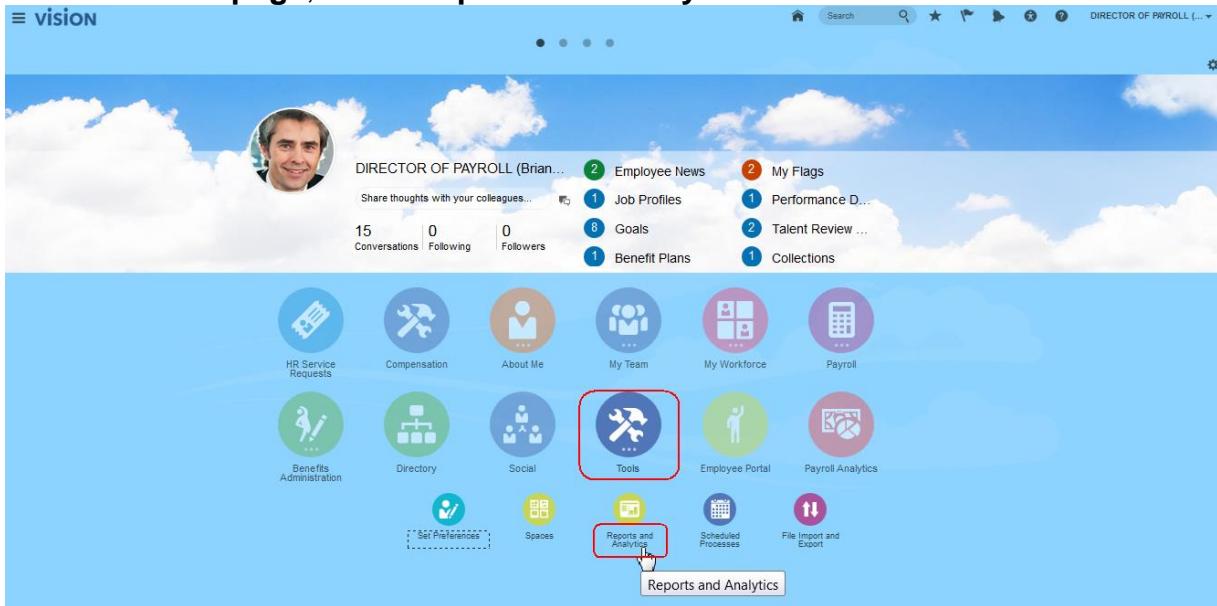
information: User: **Brian.Joseph**

In some steps, a note is included to use <XX>. The <XX> indicates that students should precede the object that they are creating with their initials so that they can easily identify their own reports.

2.2 Accessing Reports and Analytics

In this activity, you navigate to Reports and Analytics using two methods. Sign in as **Brian.Joseph**.

1. Under **Main page**, select **Reports and Analytics**.



Locating the Salary Basis Report

Background

As an HR specialist, you want to review the Salary Basis report.

Requirements

You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

Activity Scope

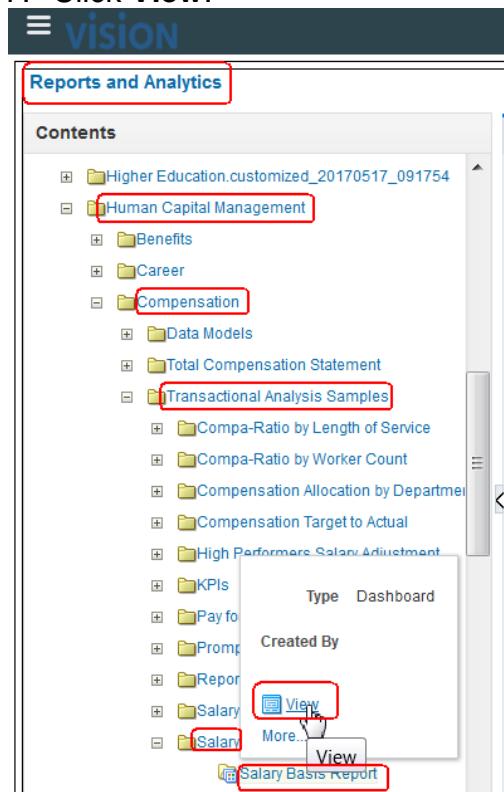
Sign in as **Brian.Joseph**. Access the **Reports and Analytics** pane from the **Navigator** menu and locate the **Salary Basis** report in the **Transactional Analysis Samples** folder under **Compensation**.

Start Here:

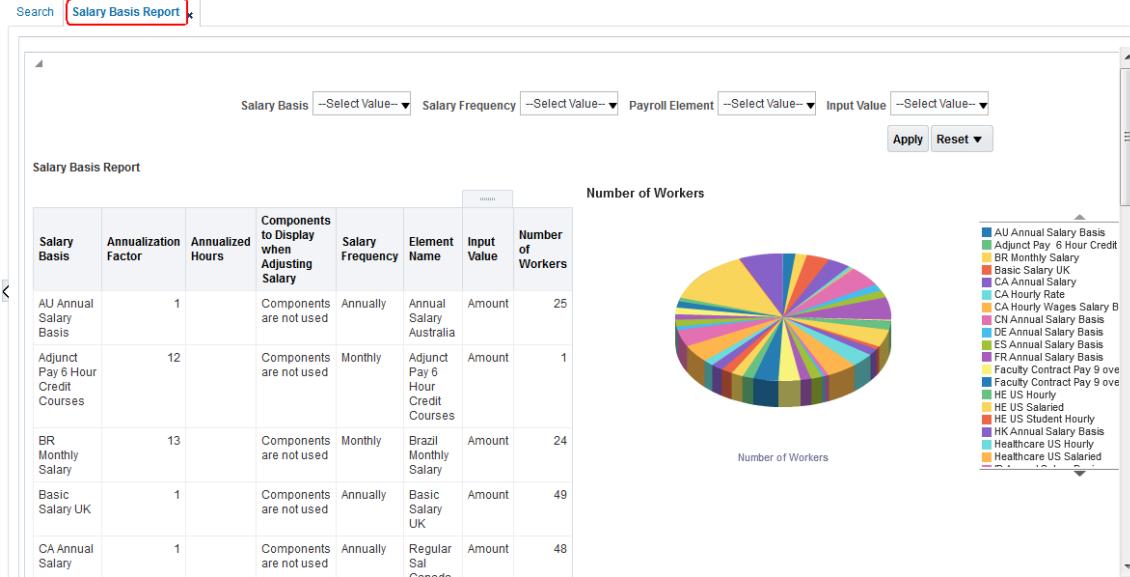
Reports and Analytics work area.

1. Expand the **Shared Folders** folder in the **Reports and Analytics** work area.
2. Expand the **Human Capital Management** folder.
3. Expand the **Compensation** Folder.
4. Expand the **Transactional Analysis Samples** folder.
5. Expand the **Salary Basis** folder.
6. Click the **Salary Basis** report.

7. Click **View**.



8. Review the report (the report may take a few minutes to load).



2.3 Creating an OTBI Analysis Using BI Composer

Background

You are the HR Specialist, and you want to review the number of absences across departments.



Requirements

You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

Activity Scope

Sign on as **Brian.Joseph**

Access the **Reports and Analytics** pane from the **Navigator** menu. Create a new analysis using the **Workforce Management - Absence Real Time** subject area. Include Department Name and Total Number of Absences. Select table, and specify that you want the table to appear above the graph. Save your analysis in **Shared Folders > Custom > <XX> Lab**, and enter **<XX> Absences by Department** for the name.

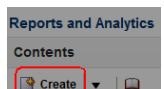
Creating an OTBI Analysis Using BI Composer

In this activity, you use BI Composer to create an analysis of absences for each department, including the absence type.

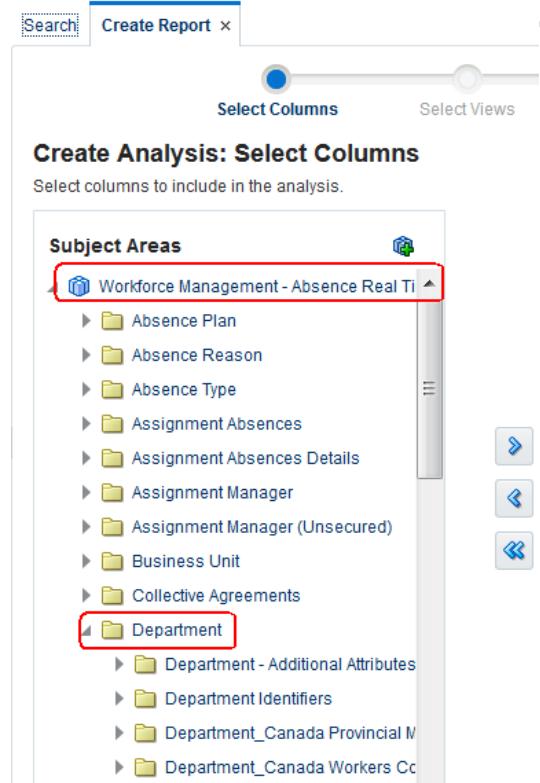
Sign in as **Brian.Joseph**

Start Here

Reports and Analytics work area



1. Click the **Create** icon button
2. Select the **Workforce Management - Absence Real Time** subject area.
Location: **Select Subject Area** window
3. Expand the **Workforce Management - Absence Real Time** folder.
4. Expand the **Department** folder.
Location: **Create Analysis: Select Columns** page



The screenshot shows the 'Create Analysis: Select Columns' interface. At the top, there are tabs for 'Search' and 'Create Report'. Below the tabs, there are two buttons: 'Select Columns' (highlighted in blue) and 'Select Views'. The main area is titled 'Create Analysis: Select Columns' and contains the instruction 'Select columns to include in the analysis.' A tree view labeled 'Subject Areas' is displayed. The first node, 'Workforce Management - Absence Real Ti', is expanded, showing several sub-folders like 'Absence Plan', 'Absence Reason', etc. The second node, 'Department', is also expanded, showing sub-folders like 'Department - Additional Attributes', 'Department Identifiers', etc. The 'Department' node is highlighted with a red box. To the right of the tree view are three small navigation icons: a right arrow, a left arrow, and a double left arrow.

5. Scroll down towards the bottom of the Department folder, select **Name**, and click the **Add** icon button to move the column to the **Selected Columns** area.
6. Scroll back up to the top of the subject area folders and expand the **Assignment Absences** folder.
7. Select **# Of Absences** and click the **Add** icon button to move the column to the **Selected Columns** area.
8. Click **Next**.

Create Analysis: Select Columns

Select columns to include in the analysis.

Subject Areas	Selected Columns									
Workforce Management - Absence Real Ti	<table border="1"> <thead> <tr> <th>Name</th> <th>Interaction</th> <th>Hidden</th> </tr> </thead> <tbody> <tr> <td>Name</td> <td>Default</td> <td><input type="checkbox"/></td> </tr> <tr> <td># Of Absences</td> <td>Default</td> <td><input type="checkbox"/></td> </tr> </tbody> </table>	Name	Interaction	Hidden	Name	Default	<input type="checkbox"/>	# Of Absences	Default	<input type="checkbox"/>
Name	Interaction	Hidden								
Name	Default	<input type="checkbox"/>								
# Of Absences	Default	<input type="checkbox"/>								

Back **Next** Finish

9. Enter **<XX> Absence by Department** in the **Title** field.

Location: **Create Analysis: Select Views** page

10. Next to the **Table** field, click **None** to open the **Table** menu.
11. Select **Table (recommended)**.
12. Next to the **Graph** field, click **None** to open the **Graph** menu.
13. Select **Bar (recommended)**.

14. Use the default layout value of **Table above Graph**.

15. Select the **Preview** option.

16. After viewing the results, click **Next**.

The screenshot shows the 'Create Report' interface with the title 'Create Analysis: Select Views'. The 'Preview' checkbox is checked. The 'Next' button is highlighted with a red box. The analysis details include a title 'LD Absence by Depar', a table 'Table (recommended)', a graph 'Bar (recommended)', and a layout 'Table above Graph'. A preview table titled 'LD Absence by Department' is shown:

Name	# Of Absences
Benefits US	15
Bio-Chemistry HE US	2
Biology HE US	41
Business Services US	4
Compensation UK	11
Compensation US	3
Consulting East US	11

17. On the **Create Analysis: Edit Table** page, click **Next**.

18. On the **Create Analysis: Edit Graph** page, click **Next**.

19. On the **Create Analysis: Sort and Filter** page, click **Next**.

20. On the **Create Analysis: Highlight** page, click **Add Column Format** in the **Formatting** region.

21. Select **# Of Absences**.

22. In the first **Threshold** field, enter **10**, and click the **down arrow** in the first **Color** field. Select the color **00FF00 (Green)**.

Information

If you hover over the colors, hover text will show the name of the color.

23. In the second **Threshold** field, enter **30**, and click the **down arrow** in the third **Color** field. Select the color **FF0000 (Red)** (leave the second color yellow).

24. Click **Next**.

Name	# Of Absences
Accounts Receivable Prg US	1
Benefits US	16
Bio-Chemistry HE US	7
Biology HE US	48
Business Services US	29
Compensation UK	26
Compensation US	4
Consulting East US	23
Consulting North US	10
Consulting South US	14
Consulting West UK	2
Consulting West US	15
Direct Sales US	6
Distribution Center US	4

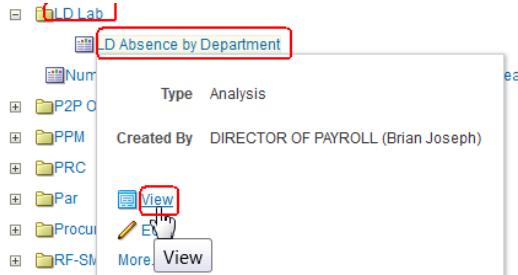
25. Enter **<XX> Absence by Department** in the **Analysis Name** field, enter a description, and then select **Create New Folder <XX> Lab** in **Shared Folders > Custom**.

26. Click **Ok > Submit**.

Go to **LD Lab** folder and click **Submit**
Location: **Confirmation** window



27. Click Home and then **Tools > Reports and analytics** (to refresh the page)
28. Expand **Shared Folders > Custom** to locate your analysis.



29. Select your report and click **View**.

30. Review your analysis.

At this point, you should have created an analysis for absences by department and saved your analysis in **Shared Folders > Custom > <XX> Lab** (because of the shared instance, you should save your analysis, reports in your own folder).

2.4 Creating an OTBI Analysis Using Oracle Business Intelligence Answers

Background

In Fusion has just completed the annual review process. As an HR Specialist, you want to compare by department the performance ratings that were given by managers with the calibrated performance ratings that were given as a result of the talent review meetings to see if there are any large discrepancies.



Requirements

You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

Activity Scope

Sign on as **Brian.Joseph / <your FASxx.Student password>**.

Access the Reports and Analytics work area from the Navigator menu.

Use the Workforce Talent Review- Talent Review Meeting Real Time subject area. Include meeting facilitator name, department, manager assessed performance rating level, and calibrated performance rating level.

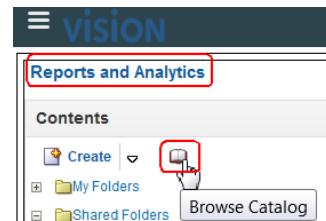
Change the column names for the rating levels so that you know which belongs to the manager and which belongs to the calibration.

Save your analysis in **Shared Folders > Custom > <XX> Lab**, and name it **<XX> Calibration and Manager Ratings Comparison**.

Creating an OTBI Analysis Using Oracle Business Intelligence Answers

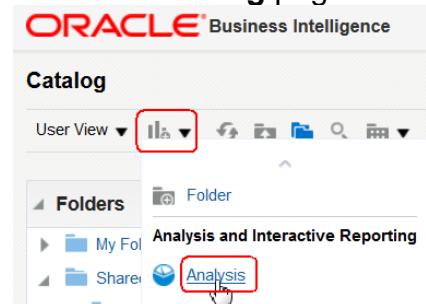
In this activity, you will create a comparison of manager ratings with calibrated ratings.
Sign in as **Brian.Joseph**.

Start Here:
Reports and Analytics work area



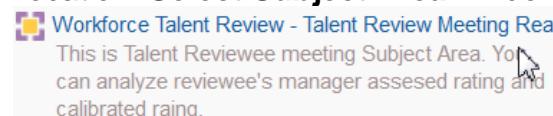
1. Click the **Browse Catalog** icon button to open **BI Catalog**.
2. Click the **New** icon button and select **Analysis**.

Location: **Catalog** page



3. Select the **Workforce Talent Review- Talent Review Meeting Real Time** subject area.

Location: **Select Subject Area** window



4. Expand the **Facilitator** folder, select **Full Name** and drag it to the **Selected Columns** region.

Location: **Criteria** tab, **Subject Areas** region

5. Expand the **Reviewee** folder, and then the **Department** folder.

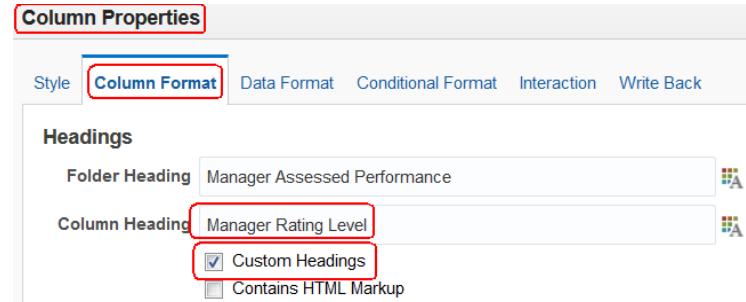
6. Select **Department Name** and drag it to the **Selected Columns** region to the right of the **Full Name** column.
7. Expand the **Reviewee Talent Data** folder, and then expand the **Manager Assessed Performance** folder.
8. Select **Rating Level** and drag it to the **Selected Columns** region to the right of the **Department Name** column.
9. Expand the **Reviewee Talent Data > Calibrated Performance** folder.
10. Select **Rating Level** and drag it to the **Selected Columns** region to the right of the **Manager Assessed Performance** column.

Information

Notice that the column headings for ratings both have a label of **Rating Level**. Steps 11 through 15 will show you how to change the labels of the columns so that you can distinguish from the calibrated rating level and the manager rating level.

11. In the **Manager Assessed Performance** column, hover over the menu icon button on the right side of the column. This is the menu icon button: 
- Location: **Criteria tab, Selected Columns region.**
12. Select **Column Properties**.
13. Select the **Column Format** tab.
- Location: **Column Properties** window.
14. Select the **Custom Headings** option.
15. In the **Column Heading** field, enter **Manager Rating Level**.

16. Click **OK**.



17. Follow steps 12 through 16 for the **Calibrated Performance** column, and change this column heading to **Calibrated Rating Level**.

The screenshot shows the 'Column Properties' dialog with the 'Column Format' tab selected. Under 'Headings', the 'Folder Heading' is set to 'Calibrated Performance' and the 'Column Heading' is set to 'Calibrated Rating Level'. A red box highlights the 'Calibrated Rating Level' input field. Below it, there are two checkboxes: 'Custom Headings' (which is checked) and 'Contains HTML Markup'.

18. Click the **Save Analysis** icon button in the upper-right corner.

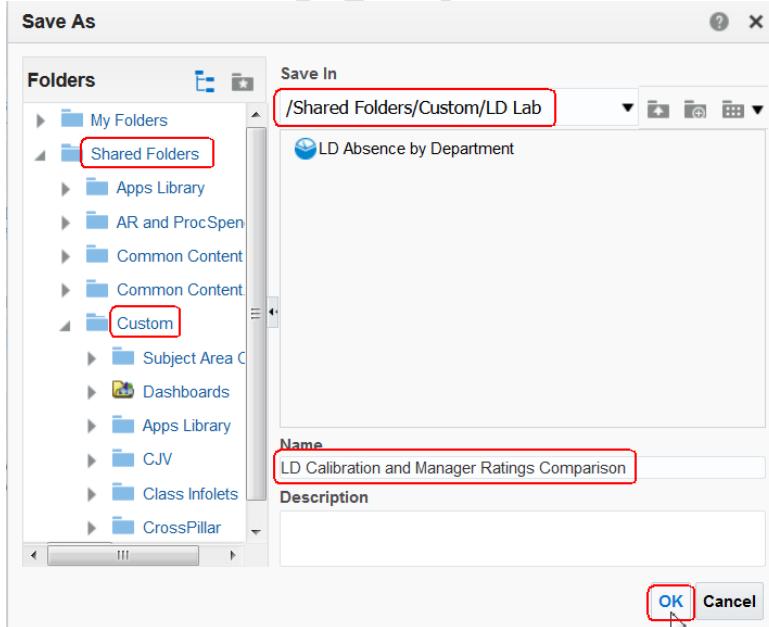
Location: **Criteria tab, Selected Columns** region

19. Select **Shared Folders > Custom > <XX> Lab >**.

Location: **Save As** window

20. Enter **<XX>Calibration and Manager Ratings Comparison** in the **Name** field.

21. Click **OK**.



22. Click the **Results** tab to see the results of your analysis.

Location: **Criteria** tab

The screenshot shows the Oracle Business Intelligence interface. The top navigation bar includes 'Search All', 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed'. The 'Criteria' tab is highlighted with a red box. The main workspace is titled 'LD Calibration and Manager Ratings Comparison'. On the left, there's a 'Subject Areas' tree view under 'Workforce Talent Review - Talent Review' and a 'Catalog' section with 'All' selected. A 'Views' section shows 'Title' and 'Table' options. The central area displays a 'Compound Layout' with a title bar 'LD Calibration and Manager Ratings Comparison' and a table component. The table has four columns: 'Full Name', 'Name', 'Manager Rating Level', and 'Calibrated Rating Level'. Data for 'Anderson, Betty' is shown across five rows, with values 2, 3, 4, 2, and 4 respectively in the last three columns.

23. Click the **Save Analysis** icon button.

Location: **Results** tab

24. Click **Home** . The home page for OBIEE appears.

25. Locate your analysis in the **Recent** region.

The screenshot shows the Oracle Business Intelligence Home page. The top navigation bar includes 'Search All', 'Home', 'Catalog', 'Favorites', 'Dashboards', 'New', 'Open', and 'Signed In As DIRECTOR OF PAYROLL (Brian Joseph)'. The 'Home' tab is highlighted with a red box. The main content area features a 'Create...' section with icons for Analysis and Interactive Reporting, Mobile Application, Published Reporting, Actionable Intelligence, Performance Management, and Marketing. Below this is a 'Recent' section with an alert for 'weekly analysis' (Normal, 4/26/17 8:20 PM) and a link to 'View | Clear | More'. Another section labeled 'Others' contains a link to 'LD Calibration and Manager Ratings Comparison' with options 'Open', 'Edit', and 'More'. A 'Most Popular' section at the bottom states 'No recommendations are currently available.'

26. Select it, and click **Open** to run the report.

27. Click **Home**.

At this point, you should have created an OTIB analysis using Oracle Business Intelligence Answers and saved your analysis to **Shared Folders > Custom > <XX> Lab**.

2.5 Creating a Cross- Subject Area Analysis

Background

As an HR specialist, you want to be able to report on head count by department, as well as annualized salary.



Requirements

You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

Activity Scope

You will create a new analysis using Oracle Business Intelligence Answers. Use the following information for your analysis:

1. Sign in as **Brian.Joseph/<your FASxx.Student password>**
2. Select the **Workforce Management - Worker Assignment Real Time** subject area.
3. Select **Department Name and Head Count**.
4. Add the **Compensation - Salary Details** subject area, and include **annualized salary**.
5. Review the results of your report, and then go back and add **Ledger Currency** (under the **Salary Details** folder) and review the results of the report again. Notice that now the Head count is empty for each row.
6. Add the following to the **Prefix** field in the **Advanced** tab: **This step is no longer needed in the current release (R12)**, but we keep it for your info.

SET VARIABLE ENABLE_DIMENSIONALITY=1, NO_FORCE_TO_DETAIL_BIN=1;

Review the results of your report again. The head count should now be populated.

Creating a Cross- Subject Area Analysis

In this activity, you create a cross-subject area analysis using Oracle Business Intelligence Answers. Sign in as **Brian.Joseph**

Start Here:

Reports and Analytics work area

1. Click the **Browse Catalog** icon button.

Location: **Reports and Analytics** work area

2. Click **New** and select **Analysis**.

3. Select the **Workforce Management - Worker Assignment Real Time** subject area.

Location: **Select Subject Area** window

4. Expand the **Department** folder.

Location: **Criteria** tab, **Subject Area** region

5. Click **Name** and drag it to the **Selected Columns** area.

6. Expand the **Worker Assignment** folder.

7. Click **Head Count** and drag it to the **Selected Columns** area to the right of the **Department Name** column.

The screenshot shows the 'Select Subject Area' window with the 'Criteria' tab active. The 'Subject Areas' tree on the left lists 'Reporting Establishment' (expanded), 'Worker', 'Worker Assignment' (expanded), and 'Worker Assignment Details'. Under 'Worker Assignment', 'Assignment Count', 'Full-Time Equivalent', and 'Head Count' are listed. The 'Selected Columns' pane on the right contains two columns: 'Department' and 'Worker Assignment'. In the 'Department' column, 'Name' is selected. In the 'Worker Assignment' column, 'Head Count' is selected. A tooltip above the columns provides instructions for interacting with the columns.

8. In the upper-right corner of the **Subject Areas** region, click the **Add/Remove** button.

 Subject Areas

9. In the **Add/Remove Subject Areas** window, select **Compensation - Salary Details Real Time**.

Location: **Add/Remove Subject Areas** window

10. Click **OK**.

The screenshot shows the Oracle BI interface with the 'Criteria' tab selected. In the 'Subject Areas' pane, two categories are expanded: 'Workforce Management - Worker Assignment Real Time' and 'Compensation - Salary Details Real Time'. Both of these expanded categories are highlighted with a red box.

11. Expand the **Compensation - Salary Details Real Time** folder.

Location: **Criteria** tab, **Subject Areas** region

12. Expand the **Salary** folder.

13. Click **Annualized Salary** and drag it to the **Selected Columns** area to the right of the **Head Count** column.

The screenshot shows the Oracle BI interface with the 'Criteria' tab selected. In the 'Subject Areas' pane, the 'Salary' folder is expanded, and its sub-item 'Annualized Salary' is selected and highlighted with a red box. In the 'Selected Columns' area, there is a list of columns: 'Department', 'Worker Assignment', 'Salary', 'Name', 'Head Count', and 'Annualized Salary'. The 'Annualized Salary' column is also highlighted with a red box.

14. Click the **Results** tab to see the results of the analysis.

Name	Head Count	Annualized Salary
AK InFusion Financial Sales	1	
Academic Affairs HE US	1	265,000
Accounting BE	3	
Accounting CN	6	672,000
Accounting DE	3	
Accounting ES	3	
Accounting FR	3	128,125
Accounting HC US	2	165,930
Accounting IT	6	179,435.9

15. Click the **Criteria** tab again to return to the analysis definition.
16. In the **Compensation - Salary Details Real Time**, expand the **Salary Details** folder.
Location: **Criteria** tab, **Subject Areas** region
17. In the **Salary Details** folder, click **Ledger Currency** and drag it to the **Selected Columns** area to the right of the **Annualized Salary** column.

Department	Worker Assignment	Salary	Salary Details
<input type="checkbox"/> Name	<input type="checkbox"/> Head Count	<input type="checkbox"/> Annualized Salary	<input type="checkbox"/> Ledger Currency

18. Click the **Results** tab to view the report again.

Information: Notice that the **Head Count** column is not blank (in release 10 it's blank).

The screenshot shows the Oracle Business Intelligence interface. The top navigation bar includes 'Alerts!', 'Home', 'Catalog', 'Favorites', 'Dashboards', and 'New'. The left sidebar has tabs for 'Criteria', 'Results' (which is selected and highlighted with a red box), 'Prompts', and 'Advanced'. Under 'Criteria', there's a 'Subject Areas' tree with nodes like Organization, Position, Reporting Establishment, Worker, etc. Below it is a 'Catalog' section with 'List' and 'All' options, and 'My Folders' and 'Shared Folders'. At the bottom are 'Views' and other navigation icons. The main content area is titled 'Compound Layout'. It contains a 'Title' field and a 'Table' section. The table has columns: Name, Head Count, Annualized Salary, and Ledger Currency. The 'Head Count' column is highlighted with a red box. The data in the table is as follows:

Name	Head Count	Annualized Salary	Ledger Currency
AK InFusion Financial Sales	1		
Academic Affairs HE US	1	265,000	USD
Accounting BE	3		
Accounting CN	6	672,000	CNY
Accounting DE	3		
Accounting ES	3		
Accounting FR	3	128,125	EUR
Accounting HC US	2	165,930	USD
Accounting IT	6	179,435.9	EUR

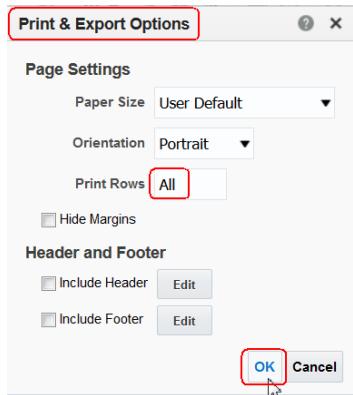
In release 10 there are additional steps necessary to have Head Count numbers. **This steps are not necessary in the current release (R13)**, but we keep it here for your info:

- Click the **Advanced** tab.
- Scroll down to the **Advanced SQL Clauses** region.
Location: **Advanced** tab
- In the **Prefix** field, enter **SET VARIABLE ENABLE_DIMENSIONALITY=1, NO_FORCE_TO_DETAIL_BIN=1;**
- Click **Apply SQL**.
- Click **OK**.
Location: **Message from Web page** window
- Click the **Results** tab again to see that the **Head Count** column hasn't change (has numbers).

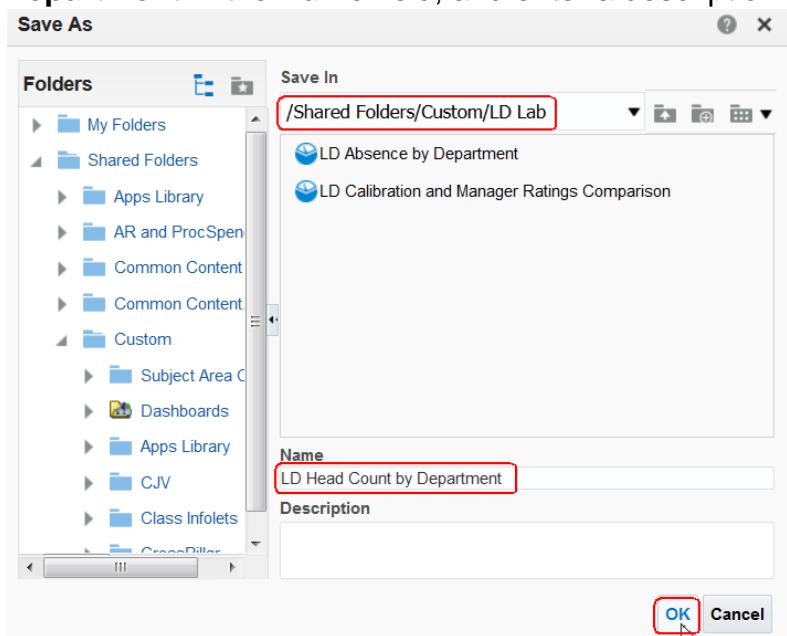
19. Click the **Print and Export Options** button. This is the **Print and Export Options** button:

The screenshot shows the Oracle Business Intelligence interface with the 'Results' tab selected. The left sidebar shows 'Subject Areas' with 'Organization' selected. The right side has a toolbar with various icons. The 'Print and Export Options' icon (a printer with a gear) is highlighted with a red box.

20. In the **Print Rows** field on the **Print and Export Options** page, select **All**.
This option enables you to print all rows for an analysis instead of only the visible rows when you add it to a briefing book. We will add this analysis to a briefing book in a later activity.



21. Click the **Save Analysis** icon button.
22. Save to **Shared Folders > Custom > <XX> Lab**, and enter **<XX> Head Count by Department** in the **Name** field, and enter a description for your analysis.



2.6 Creating a Data Model

Background

You are the BI administrator and you have been asked by the Human Resources department to create a data model that is based on the *Absences by Department* analyses that they created. They want to be able to use this data model to create more highly formatted reports.

Requirements

You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

Activity Scope

You will access BI Publisher Enterprise, create a new data model using the **<XX> Absence by Department** analysis that you created in a previous activity. Use the following information:

- In the XML Tag Name field for the data source, enter **ABSENCES_BY_DEPT**, and in the **Display Name** field, enter **Absences by Department**.
- In the XML Tag Name field for the **Department Name**, enter **DEPT_NAME**, and in the **Display Name field**, enter **Department**.
- In the XML Tag Name field for the **Assignment Absences**, enter **NUMBER_ABSENCES**, and in the **Display Name** field, enter **Number of Absences**.
- Save your date model to **Shared Folders > Custom > <XX> Lab** and name it **<XX> Absences by Department** data model.

Creating a Data Model

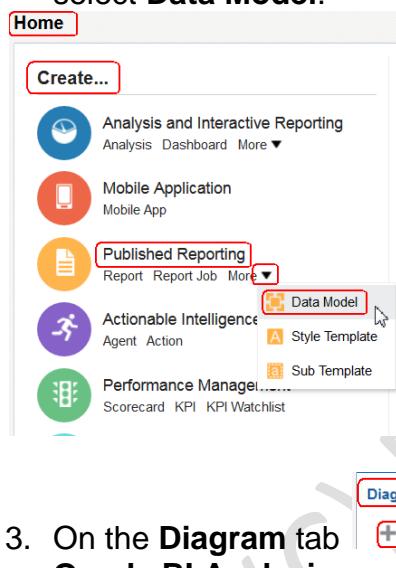
In this activity, you will create a data model using the Absence by Department analysis that you created in a previous activity as the data source.

Sign in as **Brian.Joseph**.

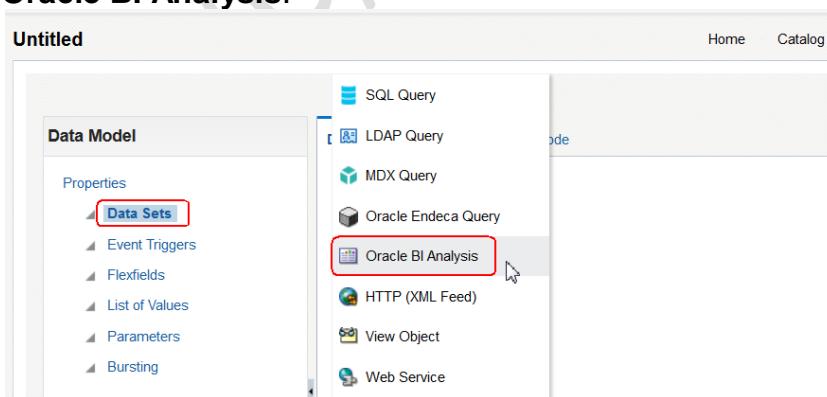
Start Here:

Reports and Analytics work area

1. Click the **Home** icon button
2. On the **OBIEE** home page under **Create, Published Reporting**, click **More** and select **Data Model**.

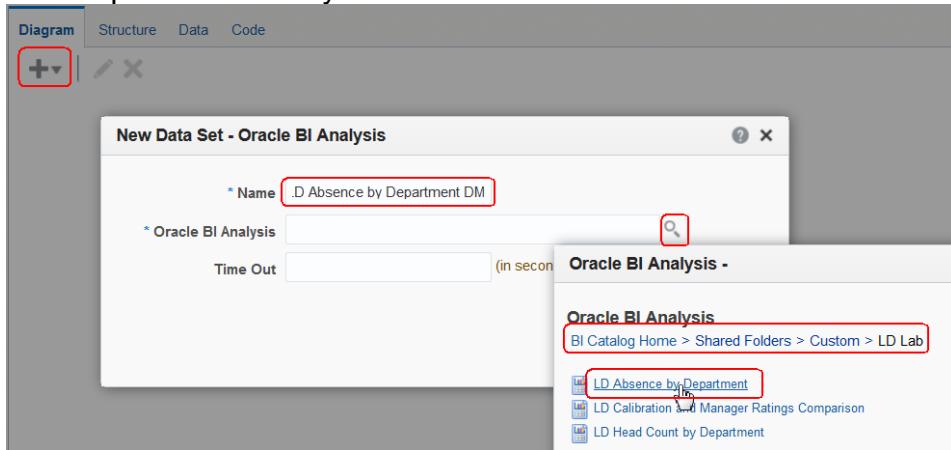


3. On the **Diagram** tab , click the **New Data Set** icon button and select **Oracle BI Analysis**.



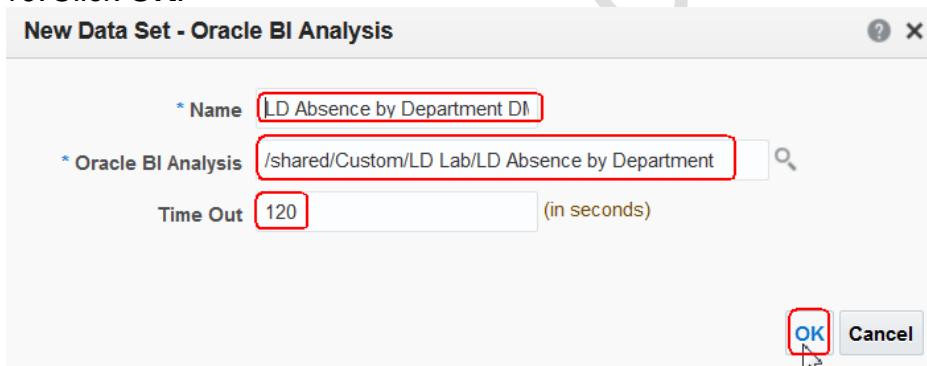
4. In the **New Data Set - Oracle BI Analysis** window, enter **<XX> Absence by Department DM**.
5. In the **Oracle BI Analysis** field, click the **Search** button.

6. In the **Oracle BI Catalog** window, click the **Users** link.
7. Click the **Brian.Joseph** link.
8. Locate and select the **<XX> Absence by Department** analysis that you created in a previous activity.



9. In the **Time Out** field, enter **120**.

10. Click **OK**.



11. Click the **Structure** tab.

12. In the **XML Tag Name** field for the **Department Name**, replace the default value with **DEPT_NAME**, and replace the default value in the **Display Name** with **Department**.
13. In the **XML Tag Name** field for the **Assignment Absences**, replace the default value with **NUMBER_ABSENCES**, and replace the default value in the **Display Name** with **Number of Absences**.

Diagram Structure Data Code

Table View Output

Data Source	XML View			Business View	
	XML Tag Name	Sorting	Value If Null	Display Name	Data Type
Report Data					
Data Structure	DATA_DS				
LD Absence by Department DM	G_1				
A 0f6ceb1264fb4fb82694f4f69a04ad7	DEPT_NAME			Department	A
#t 6d054d10c23b4057afb98b7c6d0d1ba4	NUMBER_ABSENCES			Number of Absences	#t

14. Click the **Data** tab.

15. On the **Data** tab, click **View > TreeView/Table View**.

Department	Number of Absences
Accounts Receivable Prg US	1
Benefits US	16
Bio-Chemistry HE US	2
Biology HE US	46
Business Services US	5

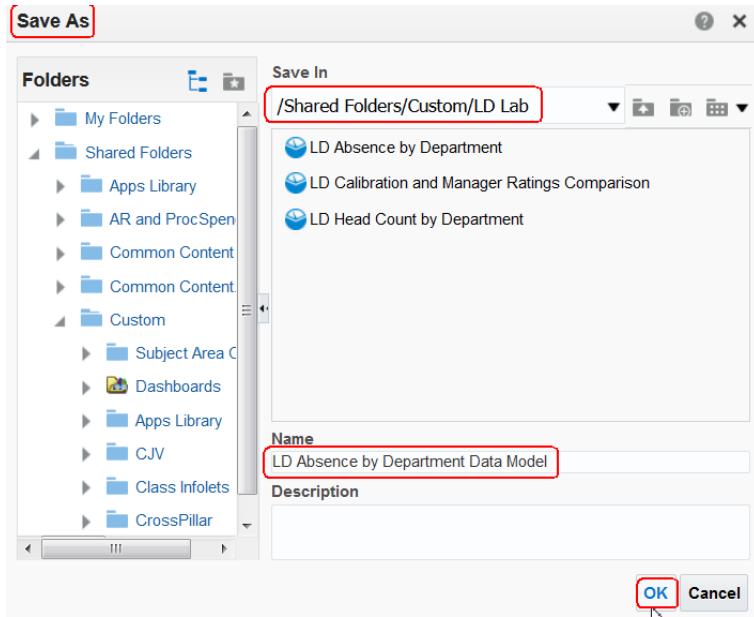
16. View the report structure and click **Save As Sample Data**. **If you do not save the sample data, you will not be able to complete Activity 8.**

17. Click **OK**.



18. In the upper-right corner, click **Save**.

19. In the **Save As** window, select **Shared Folders > Custom > <XX> Lab**, and enter **<XX> Absence by Department Data Model**.



2.7 Creating a BIP Report

Background

You are an HR specialist and you want to create a report based on the *Absence by Department* data model that your BI administrator created for you. You want to create a more formatted report that can be sent to HR management for reviewing how many absences in each type are being reported across departments.

Requirements

You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

Activity Scope

You will access BI Publisher Enterprise and create a report using the **<XX> Absence by Department Data Model** that you created in a previous activity.

Creating a BIP Report

In this activity, you create a BI Publisher report using the data model that you created in the previous activity, and then add additional details to the report.
Sign in as **Brian.Joseph**.

Start Here:

Reports and Analytics work area



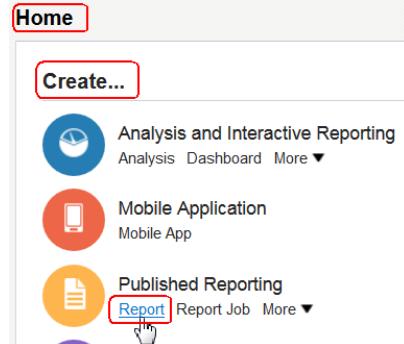
Reports and Analytics

Contents

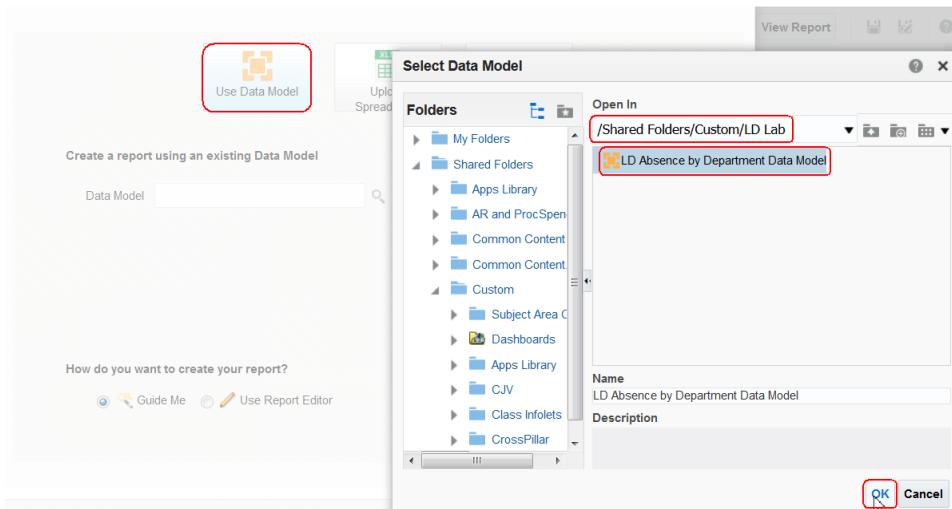


1. Click the **Browse Catalog** icon button to open the BI Catalog.

2. Click on **Home**; in the **Create** region of the OBIEE home page, under **Published Reporting**, click **Report**.

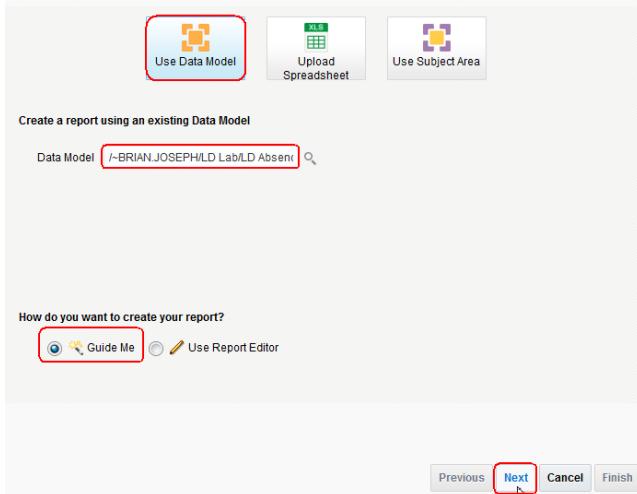


3. In the **Create Report** window, verify that **Use Data Model** is selected.
4. Click the **Search** button in the **Data Model** field.
5. In the **Select Data Model** window, select your **<XX> Absences by Department Data Model**.
6. Click **OK**.

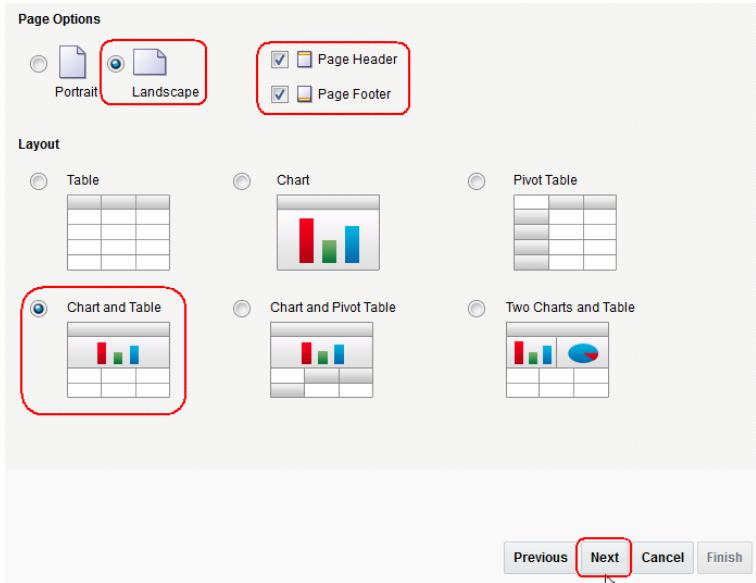


7. On the **Create Report** page, verify that the **Guide Me** option is selected, and click **Next**.

Note: You may want to adjust browser zoom level to see Next button



8. On the **Create Report, Select Layout** page, select **Landscape** for the layout.
9. Select the **Page Header** and **Page Footer** options.
10. Select the **Chart and Table** option.
11. Click **Next**.



12. On the **Create Report, Create Chart** page, drag **Number of Absences** and drop it onto the **Drop Value Here** box.

13. Drag **Department** and drop it onto the **Drop Label Here** box.

14. Click **Next**.



15. On the **Create Report, Create Table** page, review the location of each element in the table to make sure it is formatted correctly.

16. Click Next.

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

Data Source

- DATA_DS
 - G_1
 - Department
 - Number of Absences

Department	Number of Abs...
Accounts Receivable Prg US	1
Benefits US	16
Bio-Chemistry HE US	2
Biology HE US	46
Business Services US	5
	70

Previous **Next** Cancel Finish

Congratulations. You created your report!
Would you like to view your report or go to the Layout Editor to customize it?

View Report Run and view the report.

17. Select **View Report**, and then click **Finish**.

18. In the Save As window, save your report in **Shared Folders > Custom > <XX> Lab**, and name it **<XX> Absence by Department Report**.

Save As

Folders

- My Folders
- Shared Folders
 - Apps Library
 - AR and ProcSpec
 - Common Conte
 - Common Conte
 - Custom
 - Subject Area
 - Dashboards
 - Apps Library
 - CJV
 - Class Infolet
 - CrossPillar

Save In

/Shared Folders/Custom/LD Lab

LD Absence by Department

LD Absence by Department Data Model

LD Calibration and Manager Ratings Comparison

LD Head Count by Department

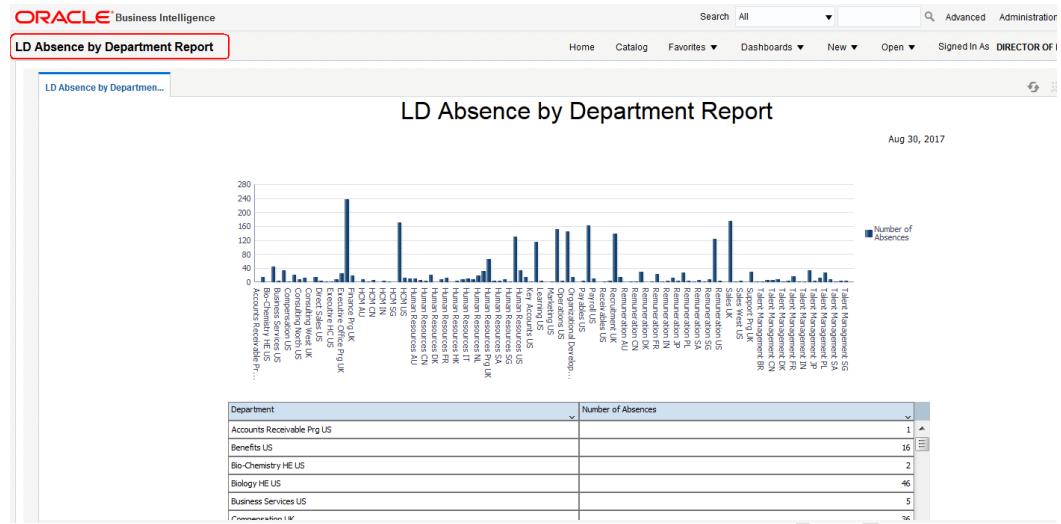
Name: LD Absence by Department Report

Description:

OK Cancel

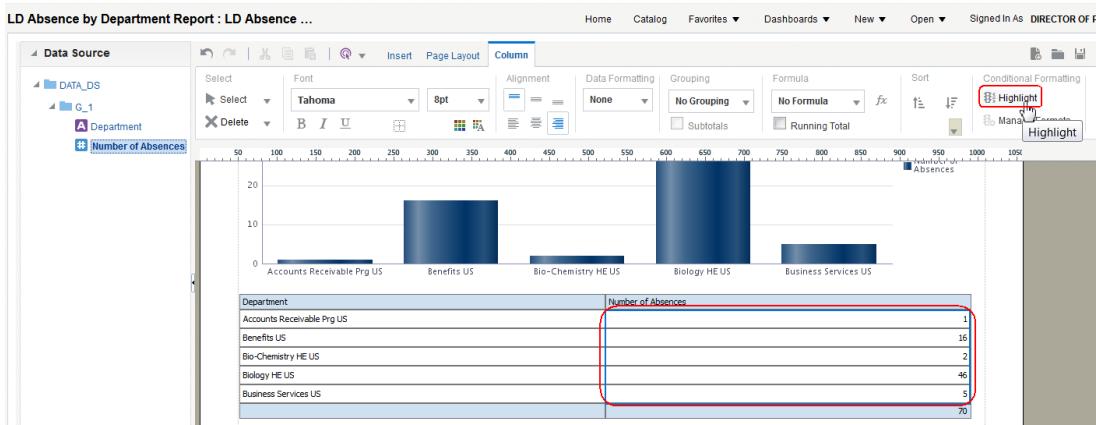
19. Click **OK**.

20. The report appears.



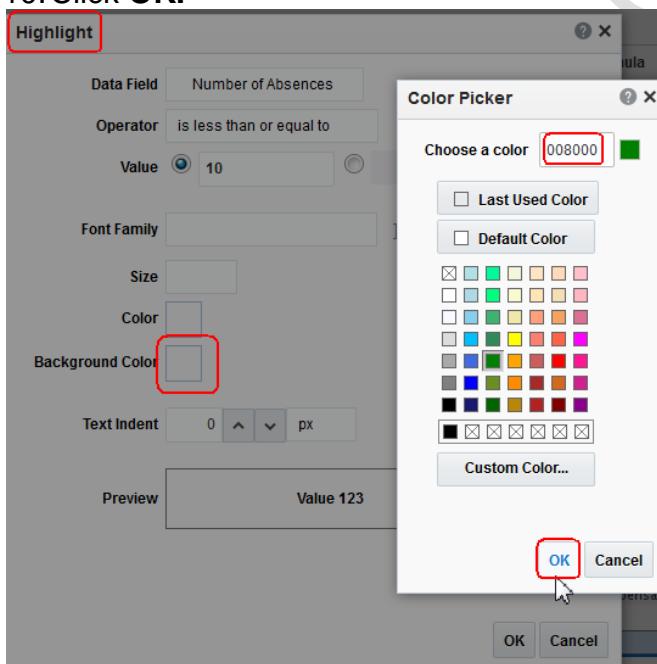
Add Additional Details to the Report

1. On the <XX> Absence by Department Report tab, in the upper right corner, click the **Actions** icon button to view the options you have for exporting, editing, and so on. This is the **Actions** icon button
2. Click **Edit Report**.
4. Click **Edit**.
5. In the table, click on the cells in the **Number of Absences** column.
6. In the **Conditional Formatting** region of the **Column** tab, click **Highlight**.



6. In the **Operator** field, select **is less than or equal to** from the drop down list.
7. In the **Value** field, enter **10**.
8. Click in the **Background Color** field.
9. In the **Color Picker** window, select **Green (008000)**.

10. Click **OK**.

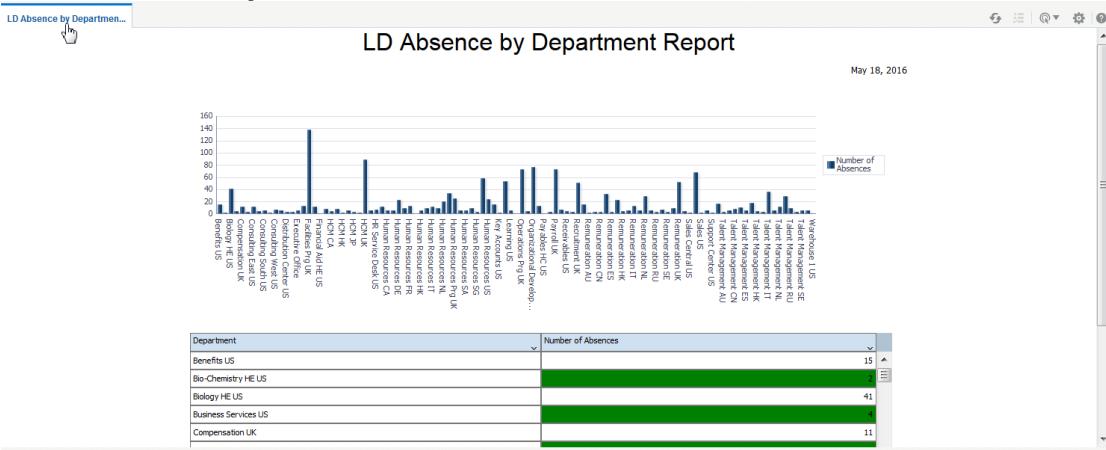


11. In the Highlight window, click **OK**.
12. Click **Save** to save the changes to your report.

13. Click Done

Done

14. Click View Report



At this point, you should have created a report based on your data model and added additional details to the report.

2.8 Briefing Book Activity

Introduction: Creating a Briefing Book

Background

You are the HR Specialist, and you want to add some of the analyses that you recently created to the Human Resources dashboard.

Requirements

You must have access to Oracle Fusion Application training instance (release 13), or your own instance (your site) on which to complete this practice.

Activity Scope

Add the cross-subject area analysis, **<XX> Head Count by Department**, that you created in a previous lesson to a briefing book. Save the briefing book in Shared Folders > Custom > **<XX> Lab**, and name it **<XX> Briefing Book**.

Creating a Briefing Book

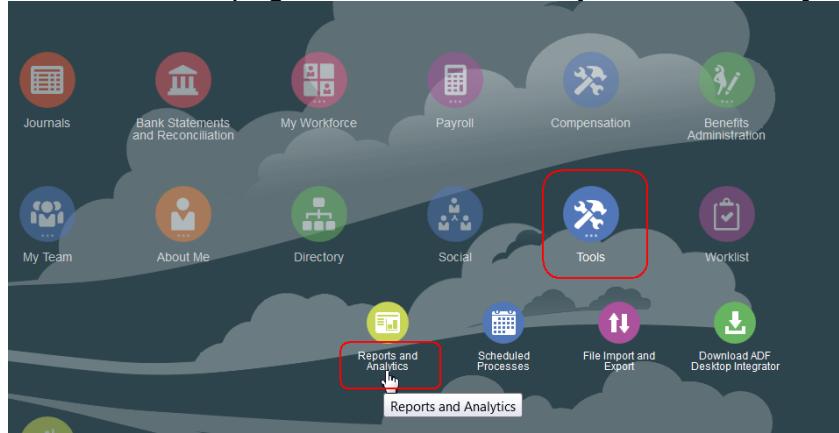
In this activity, you will add the cross-subject area analysis that you created in a previous activity to a briefing book.

Sign in as **Brian.Joseph**.

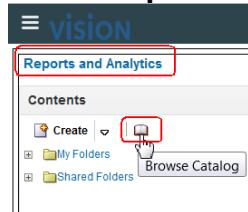
Start Here:

Home 

1. From Home page, select **Tools > Reports and Analytics**.



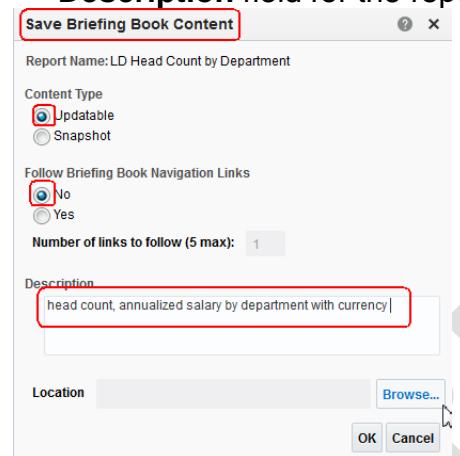
2. On **Reports and Analytics** page, click the **Browse Catalog** icon button.



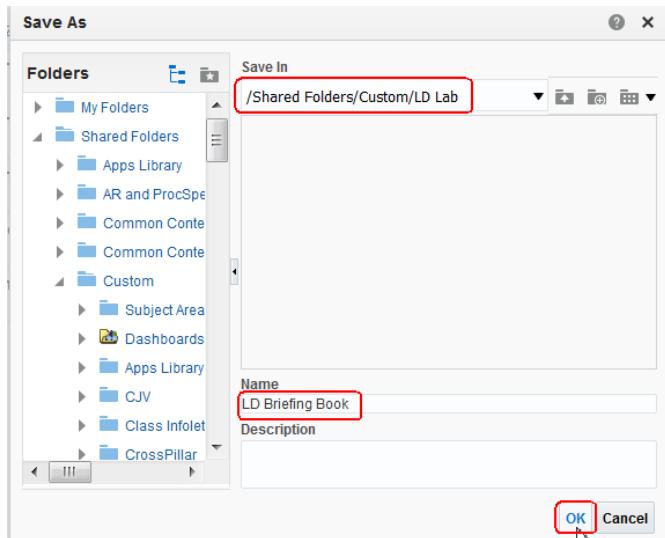
3. On the **Catalog** page, locate your cross-subject area analysis. **<XX> Head Count by Department**.
4. Click **Open** under the analysis name.
4. At the bottom of the analysis, click the **Add to Briefing Book** link.

The screenshot shows a list of reports in the Oracle BI application. The 'Add to Briefing Book' option is highlighted with a red box. Another red box highlights the 'LD Head' report in the list.

- In the **Save Briefing Book Content** window, use default values for all fields, but enter **head count, annualized salary by department with currency** in the **Description** field for the report

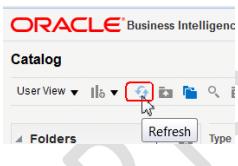
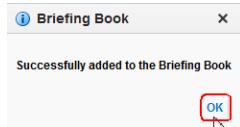


- Click the **Browse** button under the **Location** field.
- In the **Save As** window, select **Shared Folders > Custom > <XX> Lab**, and enter **<XX> Briefing Book** in the **Name** field.
- Click **OK**.



10. On the **Save Briefing Book Content** page, click **OK**.

9. In the **Briefing Book** window, click **OK** in the confirmation window.



12. Click the **Refresh**

13. On the **Catalog** page, locate your briefing book.

Type	Name	Last Modified	Owner
Icon	LD Absence by Department	8/30/17 9:38 PM	DIRECTOR OF PAYROLL (Brian Joseph)
Icon	LD Absence by Department Data Model	8/30/17 2:36 PM	DIRECTOR OF PAYROLL (Brian Joseph)
Icon	LD Absence by Department Report	8/30/17 2:47 PM	DIRECTOR OF PAYROLL (Brian Joseph)
Icon	LD Briefing Book	8/31/17 7:32 AM	DIRECTOR OF PAYROLL (Brian Joseph)
Icon	LD Calibration and Manager Ratings Comparison	8/29/17 10:24 PM	DIRECTOR OF PAYROLL (Brian Joseph)
Icon	LD Head Count by Department	8/30/17 2:22 PM	DIRECTOR OF PAYROLL (Brian Joseph)

14. Click **PDF** for your briefing book.

15. Review the PDF containing your analysis.

LD Briefing Book.pdf - Adobe Acrobat Reader DC

File Edit View Window Help

Home Tools LD Briefing Book.pdf x

Bookmarks X

AK InFusion Financial Sales
Academic Affairs HE US
Accounting BE
Accounting CN
Accounting DE
Accounting ES
Accounting FR
Accounting HC US
Accounting IT
Accounting JP
Accounting SE
Accounting UK
Accounting US
Accounts Receivable Prg US
Adams Elementary School Prg US
Allied Services HC US
Applications and Services
Benefits CL
Benefits CO
Benefits DE
Benefits ES

2 / 10

76.9%

LD Head Count by Department (8/31/17 7:34 AM)

Name	Head Count	Annualized Salary	Ledger Currency
AK InFusion Financial Sales	1		
Academic Affairs HE US	1	265,000	USD
Accounting BE	3		
Accounting CN	6	672,000	CNY
Accounting DE	3		
Accounting ES	3		
Accounting FR	3	128,125	EUR
Accounting HC US	2	165,930	USD
Accounting IT	6	179,435.9	EUR
Accounting JP	7	70,000,000	JPY
Accounting SE	3		
Accounting UK	3		
Accounting US	12	273,662	USD
Accounts Receivable Prg US	25	343,323.2	USD
Adams Elementary School Prg US	7	217,114.58	USD
Allied Services HC US	1	205,040	USD
Applications and Services	14	1,095,373	USD
Benefits CL	2		
Benefits CO	1		
Benefits DE		99,326.24	EUR
Benefits ES		61,956.84	EUR

2.9 Creating an Agent

Background

You are an HR specialist and you want to create an agent to run a briefing book.

Activity Scope

Create an agent to deliver the briefing book that you created in a previous activity.

Creating an Agent

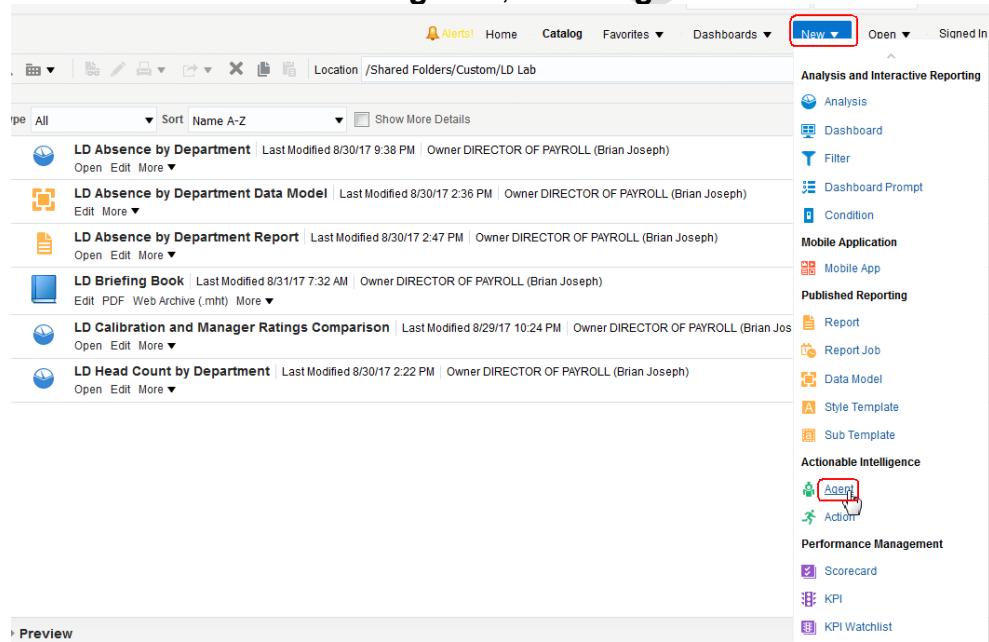
In this activity, you will create an agent to deliver the briefing book that you created in a previous lesson.

Sign in as **Brian.Joseph**.

Start Here:

Reports and Analytics work area

1. In the **Reports and Analytics** work area, click the **Browse Catalog** icon button.
2. In the **Catalog** page, click the **New** icon button.
3. Under **Actionable Intelligence**, select **Agent**.



4. On the **Overview** page, select the **Schedule** tab.
5. In the **Frequency** field, select **Monthly**.
6. Select the **Day** option, and select **1**.
5. Select all months.

The screenshot shows the 'Untitled Agent' configuration screen. The 'Schedule' tab is highlighted with a red box. The schedule is set to 'Monthly' frequency, 'first' day of the month, and 'Day 1'. The 'On' dropdown is set to 'first' and 'Sunday'. The 'Of' dropdown is set to 'January', 'February', 'March', 'April', 'May', 'June', 'July', 'August', 'September', 'October', 'November', and 'December'. The 'Start' date is '08/31/2017 07:39:00 AM' and the 'End' date is '08/31/2017'. The 'Re-run Agent Every' field is set to '1 Minutes'.

8. Click the **Delivery Content** tab.
9. On the **Delivery Content** tab, in the **Subject** field, enter **Head Count and Salary**
10. In the **Content** field, select **Briefing Book**.
11. Click the **Browse** button.
12. In the **Choose Delivery Content** window, locate and select the briefing book that you created in a previous activity.

13. Click OK.

The screenshot shows the 'Delivery Content' tab selected. The 'Content' field is set to 'Briefing Book'. A 'Choose Delivery Content' dialog box is open, showing a tree view of content items. 'LD Briefing Book' is selected and highlighted with a red box. The 'OK' button at the bottom right of the dialog box is also highlighted with a red box.

14. Click the **Recipients** tab.

15. On the Recipients tab, select Brian.Joseph

The screenshot shows the 'Recipients' tab selected in the navigation bar. Under 'Direct Agent Recipients', there is a list of users. The user 'DIRECTOR OF PAYROLL (Brian Joseph)' is highlighted with a red box. Other tabs visible include General, Schedule, Condition, Delivery Content, Destinations, and Actions.

16. Click the Destination tab.

17. On the Destination tab, clear the Home Page and Dashboard option.

18. Select the Specific Devices option.

19. Select only the Email option.

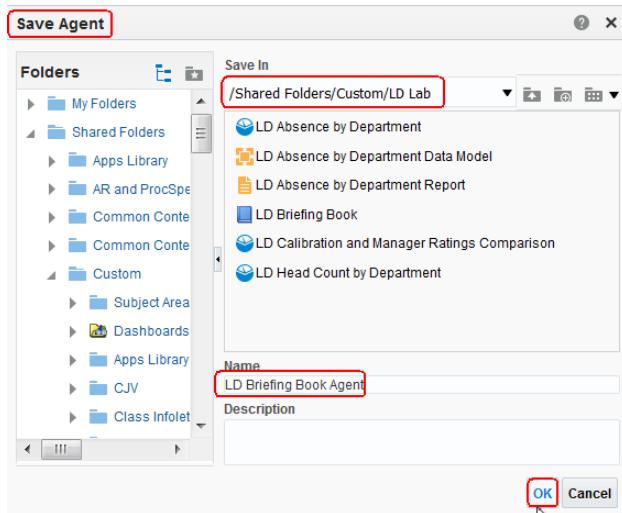
The screenshot shows the 'Destinations' tab selected in the navigation bar. Under 'Specify where this Agent will be delivered', the 'User Destinations' section is expanded. The 'Specific Devices (will override a user's Active Delivery Profile)' checkbox is checked and highlighted with a red box. Other delivery options like 'Email', 'Pager', 'Digital Phone', and 'Handheld Device' are also listed. The 'General' tab at the top shows basic agent settings.

20. In the upper-right corner, click Save this Agent.



21. In the Save Agent window, select My Folders and enter <XX> Briefing Book Agent for the Name.

22. Click OK.



23. Click **Catalog** to return to the **Catalog** page.

24. In the **Type** field, select **Agent** to verify that your agent was saved.

The screenshot shows a catalog page with a toolbar at the top. The 'Location' dropdown is set to '/Shared Folders/Custom/LD Lab'. The main area displays a list of agents, each with a small icon, name, last modified date, owner, and a 'More' dropdown menu. The agents listed are: 'LD Absence by Department', 'LD Absence by Department Data Model', 'LD Absence by Department Report', 'LD Briefing Book', 'LD Briefing Book Agent', 'LD Calibration and Manager Ratings Comparison', and 'LD Head Count by Department'. The 'LD Briefing Book Agent' entry is highlighted with a red box.

Lab 3: Working with OTBI Analytics (Oracle ERP Cloud)

Overview

In this practice you will review the Home and Catalog tabs in Oracle Business Intelligence, and search for reports related to invoices.

Note: If any of the UI components are not visible or available, for example the New menu or Browse/Manage section, then try signing out and back in.

You are new to using Oracle Business Intelligence and need to find predefined Oracle Transactional Business Intelligence reports for Oracle Fusion Payables.

Assumptions

Sign in as your **FASXX.Student** user as assigned by the instructor.

3.1 Accessing OTBI Reports

1. **Navigate to: Tools > Reports and Analytics.**
2. Click the **Browse Catalog** icon button in the toolbar.
3. Click the **Home** link. (First link on the right side of the top navigation bar.)
4. Use the Create section or the New menu to create analyses, dashboards, and other BI objects such as scorecards and Oracle BI Publisher reports.
 - Use the Browse/Manage section, the middle part of the panel on the left, to quickly access BI objects that you created. Use the various other sections and menus on the Home tab to access what you need.
 - To access the Oracle BI Presentation Catalog, click the **Catalog** link, the second link on the right side of the top navigation bar. This tab is where you landed coming from the Reports and Analytics work area, and the **Folders** panel reflects what you see in the Reports and Analytics work area.
5. In the Folders panel, open **Shared Folders > Financials**.
6. Open the **Payables** folder to access Oracle Transactional BI content for Payables.
7. Click the **Invoices** folder. You can click the **Open** link under items in the right panel to view dashboards, or keep browsing for individual analyses.

The screenshot shows the Oracle Business Intelligence Catalog interface. The top navigation bar includes 'Search All', 'Alerts', 'Home', 'Catalog', and 'Favorites'. The location bar shows the path: 'Shared Folders/Financials/Payables/Invoices'. The left sidebar has sections for 'Folders' and 'Tasks'. Under 'Folders', the 'Payables' folder is expanded, and its subfolder 'Invoices' is also expanded, with its contents listed below. The right pane lists various BI objects with their descriptions and edit options.

8. Expand the Report Components folder within the Invoices folder. Here you access individual analyses. Note the different icons to indicate the type of BI object you are looking at.
9. Instead of browsing, you can use the search at the top of the UI. To search for all analyses with *Invoice* in the name or description, select *Analysis* as the search category.
10. Enter **Invoice** as the keyword and click the **Search** icon button.

The screenshot shows the Oracle Business Intelligence Catalog search interface. The search bar contains 'Invoice'. The 'Type' dropdown is set to 'Analysis'. The results list several analyses related to invoices, such as 'Payables Invoice Audit by Voucher Number Listing' and 'Payables Negative Supplier Balance Report'. The search results are displayed in a grid format with columns for name, last modified date, owner, and type.

11. In the search results, you can see all analyses with the term **Invoice**. Note the file path of the analyses within the BI Presentation catalog.

The screenshot shows the Oracle Catalog interface. At the top, there are navigation links: User View, Home, Catalog, Favorites, and Dashboard. Below the header is a toolbar with various icons. The main area is titled "Search" and has fields for "Search" (set to "Invoice"), "Location" (set to "/Shared Folders/Financials"), and "Type" (set to "Analysis"). A red box highlights the "Search" button. To the right of these fields is a list of report components. The first item in the list is "Distributions per Invoice Line for Invoice Register", which is highlighted with a red box. Other items listed include "Filter subquery for Payments per Invoice for Invoice Register", "Invoice Details for Credit Memo Matching", "Invoice Details for Negative Supplier Balance Report", "Lines and Distributions per Invoice for Invoice Register", and "Payables Invoice Audit by Voucher Number Listing". Each item shows its last modified date (11/5/2016 1:04:24 AM), owner (System Account), and a link to "Show More Details".

12. Change Type to All and click Search

This screenshot shows the same Oracle Catalog interface as above, but with different search criteria. The "Type" dropdown has been changed from "Analysis" to "All", and the "Search" button has been clicked, as indicated by the mouse cursor over it. A red box highlights the "All" option in the dropdown and the "Search" button.

13. Notice there is a larger list returned

3.2 Use the BI Composer Activity

Overview

In this practice, you will create an analysis using the **BI Composer** from the Reports and Analytics work area, listing the supplier name, number, site name, and address. Use the **Payables Invoices - Transactions Real Time** subject area, which contains the attributes you need. Run the analysis and generate an Excel file.

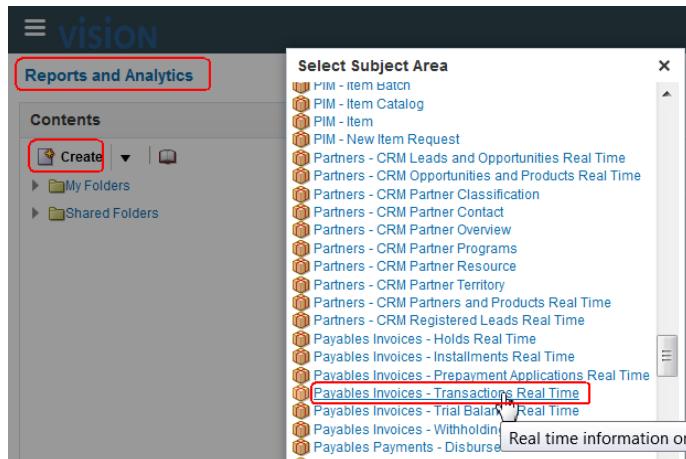
You need a simple listing of suppliers that can be easily exported to a Microsoft Excel file.

Assumptions

Sign in as your **FASXX.Student** user as assigned by the instructor.

Tasks

1. **Navigate to: Tools > Reports and Analytics.**
2. Click the **Create** button.
3. From the list of subject areas, select **Payables Invoices - Transactions Real Time**.



4. Expand the **Payables Invoices - Transactions Real Time** subject area.
5. Select the following attributes within the specified folders. Click the **Add** button after each selection to move the selection to the Selected Columns region.
 - Supplier
 - Supplier
 - **Supplier Number**
 - Supplier Site
 - Site
 - Address Line 1
 - City
 - State
 - Postal Code
 - Country
6. Click the **Next** button.
7. In the **Title** field, enter **Suppliers**

8. For the Table option, select Table (recommended); Preview.

9. Click the **Next** button.

The screenshot shows the 'Create Analysis: Select Views' interface. The 'Select Views' tab is active. A table titled 'Suppliers' is shown with the following data:

Supplier	Supplier Number	Site	Address Line 1	City	State	Postal Code	Country
ABC Consulting	1288	ABC US1	1100 ABERNATHY RD	ATLANTA	GA	30328	US
Advanced Corp	1263	AC US1	5500 STATE ST	BOSTON	MA	02109	US
Allied Manufacturing	1265	Allied US1	1600 E WARREN AVE	DETROIT	MI	48207	US
American Telephone and Telegraph	1259	ATT US1	267 MARIETTA ST NW	ATLANTA	GA	30313	US
Building Management	1270	BM US1	15 TRINITY AVE SW	ATLANTA	GA	30303	US

10. Click **Next**, and Move the **Supplier Number** attribute to the top.

Create Analysis: **Edit Table**

Edit table properties and layout.

The screenshot shows the 'Edit Table' step. Under 'Table Layout', the 'Supplier Number' column is selected and highlighted with a red box. It is being moved to the top position using the 'Move To' dropdown menu.

11. Click the **Next** button.

12. Click the **Add Sort** button and select **Supplier Number**.

13. Add another sort and select **Supplier**.

Create Analysis: **Sort and Filter**

Sort columns and apply filter.

The screenshot shows the 'Sort and Filter' step. The 'Sort' table has two entries: 'Sort ... Supplier Number' (Ascending) and 'Then... Supplier' (Ascending). The 'Supplier Number' column is highlighted with a red box.

Order	Column	Sort	Actions
Sort ...	Supplier Number	Ascending	X
Then...	Supplier	Ascending	X

14. Click the **Next** button twice, skipping the highlight.

15. Select **Shared Folders > Custom > <XX> Lab**.

16. Click the **Create New Folder** icon (on the far right).

17. Enter the new folder name, **XX Payables**.

18. Click **OK**.

The screenshot shows the 'Create New Folder' dialog box. The 'New Folder Name' field contains 'LD Payables' and the 'OK' button is highlighted with a red box.

19. Select the new **XX Payables** folder.

20. Enter **XX Supplier Listing** in the **Analysis Name** field in the header.

Search Create Report

Selected Columns Selected Views Edit Table Sort and Filter Highlight Save

Create Analysis: Save
Enter analysis name and location to save it.

Analysis Name Supplier Listing

Description

Save In

- ▶ Japan
- ▶ LD Lab
 - ▶ LD Absence by Department Data Model.xmd
 - ▶ LD Absence by Department Report.rdo
 - ▶ LD Payables
 - ▶ LD Absence by Department
 - ▶ LD Calibration and Manager Ratings Comparison
 - ▶ LD Head Count by Department

Submit Cancel

21. Click the **Submit** button.
22. Click the **OK** button.
23. In the Reports and Analytics panel, navigate to the folder you just created and expand it.
(Reports and Analytics > My Folders > XX Payables.)
24. Click **XX Supplier Listing** and then the **View** link.

vision

Reports and Analytics

Contents

- ▶ LD Absence by Depart
- ▶ LD Calibration and Ma
- ▶ LD Head Count by Dej
- ▶ LD Payables
 - ▶ Supplier Listing
- ▶ Number
- ▶ P2P OTB
- ▶ PPM
- ▶ PRC
- ▶ Par
- ▶ Procure
- ▶ RF-SMAF
- ▶ RmPNS

Search All

No search conducted.

Type Analysis
Created By VP FINANCE (Casey Brown)

View Edit More... View

25. At the bottom of the analysis, click the **Export** link and select Excel 2007.

Search Supplier Listing

1257	Howell Engineering Inc.	Howell US1	1200 W WASHINGTON ST	PHOENIX	AZ	85007	US
1258	United Parcel Service	UPS US1	55 GLENLAKE PKWY	ATLANTA	GA	30328	US
1259	American Telephone and Telegraph	ATT US1	267 MARIETTA ST NW	ATLANTA	GA	30313	US
1260	Staples	Staples US1	500 STAPLES DR	FRAMINGHAM	MA	01702	US
1261	GE Capital	GE Capital US1	3135 EASTON TPKE	FAIRFIELD	CT	06828	US
1262	EIP Inc	EIP US1	145 VAN NESS AVE	SAN FRANCISCO	CA	94102	US
1263	Advanced Corp	AC US1	5500 STATE ST	BOSTON	MA	02109	US
1264	Office Depot	OD US1	6600 N MILITARY TRL	BOCA RATON	FL	33496	US
1265	Allied Manufacturing	Allied US1	1600 E WARREN AVE	DETROIT	MI	48207	US
1266	Midtown Computer Supplies	MCS US1	25 PECK ST	PROVIDENCE	RI	02903	US
1267	Metal Works	Metal Works US1	1200 GRANT ST	PITTSBURGH	PA	15219	US
1269	Prouty Supply House	PSH US1	131 DUANE ST	NEW YORK	NY	10013	US
1270	Building Management	BM US1	15 TRINITY AVE SW	ATLANTA	GA	30303	US
1283	InterUK	InterUK US1	55a Cambridge Rd	Sawbridgeworth		CM21 9JP	GB
1284	InterUS1	US1 CLP	4324 Island Way	Carlsbad	California	92011	US
1286	PDF	CLP US1	30021 FAIRESTA ST	LA CRESCENTA	CA	91214	US
1287	Excel 2007	TAX PAYMENTS	INTERNAL REVENUE SERV.	CINCINNATI	OH	45280	US
1288	Powerpoint 2007+	ABC US1	1100 ABERNATHY RD	ATLANTA	GA	30328	US
1295	Web Archive (.mht)	CDW US1	200 N MILWAUKEE AVE	VERNON HILLS	IL	60061	US
1327	Data	Lagring Systems	2 Fort Place	Saint George	NY	10301	US

Refresh - Print Export

Rows 1 - 25

26. Click the **OK** button to view the Excel file.

	A	B	C	D	E	F	G	H	I	J
1	Suppliers									
2	Supplier Listing									
4	Supplier Number	Supplier	Site	Address Line 1	City	State	Postal Code	Country		
5	1252	Lee Supplies	Lee US1	5000 CARTER DR	LOS ANGELES	CA	90032	US		
6	1253	Staffing Services	Staffing US1	1144 LOGAN ST	DENVER	CO	80203	US		
7	1254	JGA	JGA US1	600 5TH AVE	SEATTLE	WA	98104	US		
8	1255	Dell Inc.	Dell US1	2300 GREENLAWN BLVD	ROUND ROCK	TX	78664	US		
9	1256	US Gas and	USGE US1	1144 LOGAN ST	DENVER	CO	80203	US		
10	1257	Howell Engineering Inc.	Howell US1	1200 W WASHINGTON ST	PHOENIX	AZ	85007	US		
11	1258	United Parcel Service	UPS US1	55 GLENLAKE PKWY	ATLANTA	GA	30328	US		

3.3 Create an Analysis, View, and View Selector Activity

Overview

In this practice, you will create an **analysis** using the **Payables Invoices - Transactions Real Time** option, which contains the supplier, business unit, and invoices attributes you need. The table view of this analysis shows the invoice number, invoice date, invoice amount and currency, and payment status for any given supplier and business unit combination.

For the high-level overview, create a pie graph that has supplier and business unit as graph prompts and shows the unpaid and partially paid statuses as slices. Create a view selector that lets you select between the table and graph views.

Note: The Real Time suffix indicates that this is an Oracle Transactional BI subject area that you can use to create operational reports.

You want to track unpaid and partially paid invoices per supplier and business unit. You also want two views of the information, one that provides a high level overview of the payment statuses of all invoices for a given supplier and business unit, the other listing specific invoices.

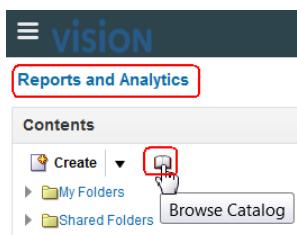
Assumptions

Sign in as your **FASXX.Student** user as assigned by the instructor.

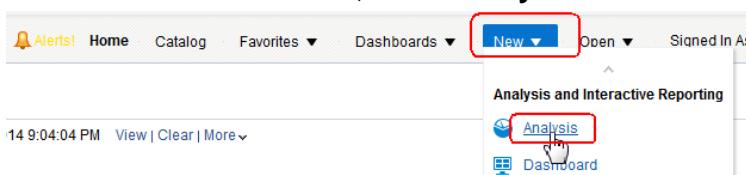
Tasks

Create Analysis and Table View

1. Navigate to: Tools > Reports and Analytics.
2. Click the **Browse Catalog** icon button in the toolbar.



3. From the **Create** menu, select **Analysis**.



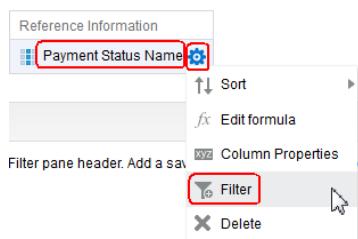
4. From the list of subject areas, select **Payables Invoices - Transactions Real Time**.
5. In the Subject Areas panel, expand the following folders and double-click the specified attributes to add them to the Selected Columns section.
 - Supplier
 - **Supplier**
 - Business Unit
 - **Business Unit Name**
 - Invoice Details

- Invoice Details > General Information
- **Invoice Number**
- **Invoice Date**
- Invoice Details > Reference Information
- **Payment Status Name**
- Invoice Details > Invoice Amounts
- **Invoice Amount**
- **Invoice Currency**

6. Select **Payment Status Name** column (from Selected Columns) and move it at the end of the table.

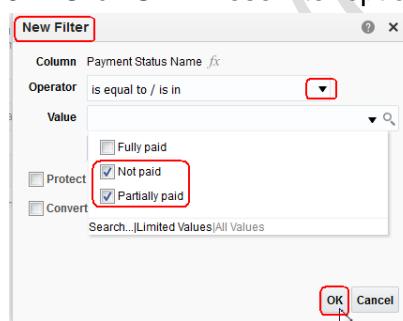
The screenshot shows the 'Selected Columns' pane with a list of columns from different subject areas: Supplier, Business Unit, General Information, Reference Information, and Invoice Amounts. The 'Payment Status Name' column is highlighted with a red box and a red arrow points to its position in the list.

7. Add a filter to the **Payment Status Name** attribute. For the **Payment Status Name** column, open the contextual menu, and select Filter.



8. Select the **Not paid** and **Partially paid** options for the **Value** field. Leave the **Operator** field with the **is equal to / is in** value.

9. Click **OK**. These filter options are added to the Filters region.



10. Select the Results tab **Results** to see the compound layout that displays selected data in a tabular view.



11. Click **Edit View** **Layout**

Drag the header of the **Supplier** and **Business Unit Name** columns to the Table Prompts section so that you can filter the rest of the data based on supplier and business unit. **Note:** Hover over the Supplier column until you see the gray bar as displayed below. Grab the

gray bar and drop the Supplier column in the Table Prompts area. Move the Business Unit Names column to the right of the Supplier in the Table Prompts region.

Note: You may want to maximize Layout region (drag)

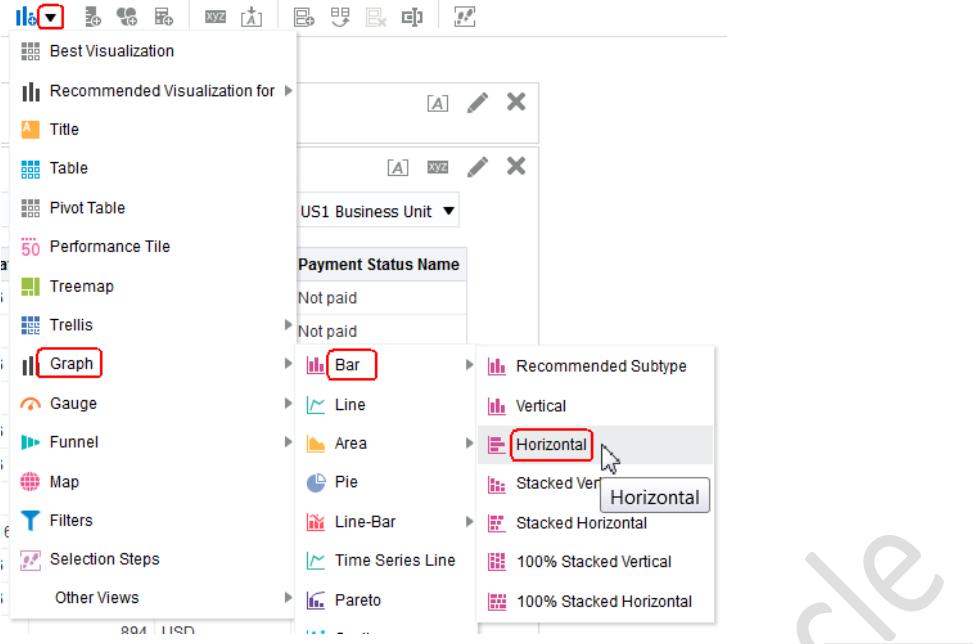
Click Done

12. Select ABC Consulting for the **Supplier** field and US1 Business Unit for the **Business Unit Name** field. The table refreshes to show all the invoices with a payment status of Not paid or Partially paid, for the specified supplier and business unit.

Invoice Number	Invoice Date	Invoice Amount	Invoice Currency	Payment Status Name
ABC-07292015003	12/23/2015	894	USD	Not paid
ABC-07292015020	1/20/2016	894	USD	Not paid
ABC-07292015027	2/8/2016	894	USD	Not paid
ABC-07292015041	1/21/2016	894	USD	Not paid
ABC-07292015075	3/1/2016	894	USD	Not paid
ABC-07292015079	1/13/2016	894	USD	Not paid

Create Graph View

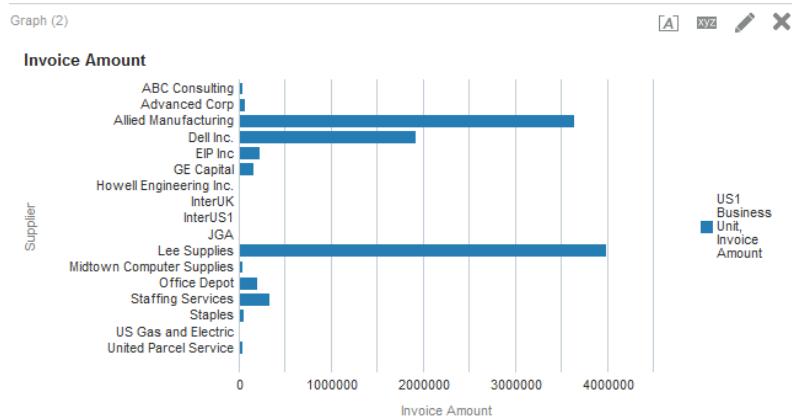
13. In the toolbar of the Results tab, click the **New View** icon button and select Graph > Bar > Horizontal.



14. On the toolbar of the graph, click the **Edit View** icon button
15. In the Layout section use the print screen for selections

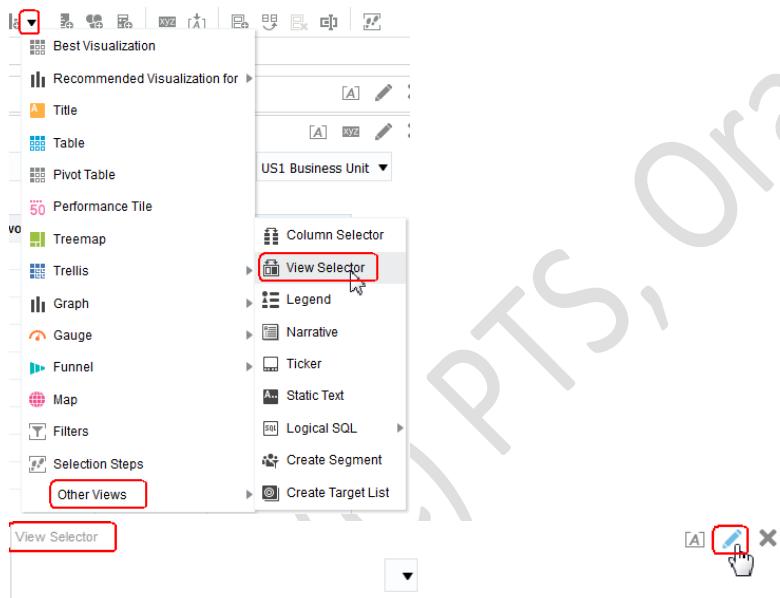
The screenshot shows the 'Edit View' dialog for a Bar Graph. At the top, there are tabs for 'Layout' (selected) and 'Display as Slider'. Below the tabs, there are sections for 'Sections' (XYZ) and 'Display as Slider'. The main area is titled 'Bar Graph'. Under 'Measures', there is a section for 'Bars (Horizontal Axis)' containing 'Invoice Amount' (highlighted with a red box). Under 'Bars', there is a section for 'Group By (Vertical Axis)' containing 'Supplier' (highlighted with a red box). Under 'Vary Color By (Vertical Axis)', there is a checked checkbox for 'Show In Legend'. Under 'Business Unit Name', there is a section for 'Measure Labels'. At the bottom, there is an 'Excluded' section containing 'Invoice Number', 'Invoice Date', 'Invoice Currency', and 'Payment Status Name', with 'Invoice Number' highlighted with a red box. At the very bottom, there is a footer with the text 'Editing from: "Compound Layout"' and two buttons: 'Done' (highlighted with a red box) and 'Revert'.

19. Click the **Done** button

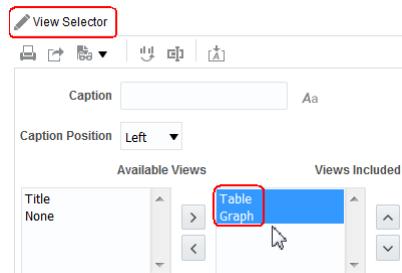


Create View Selector

20. In the toolbar of the Views panel on the Results tab, click the **New View** icon button and select **Other Views > View Selector**.



21. Include the **Table** and **Graph** views.

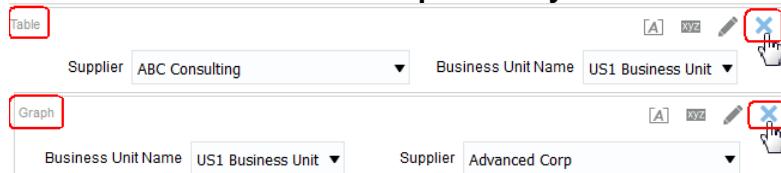


22. Click the **Done** button.

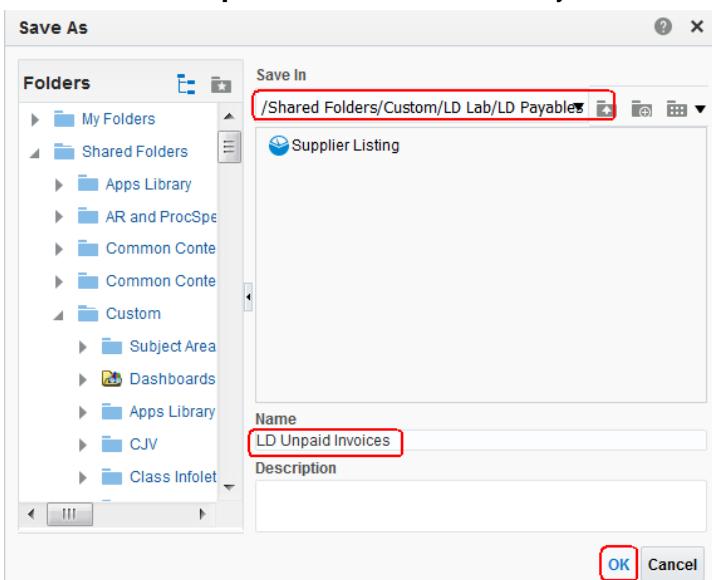
23. With **View Selector** selected in the Views panel, click **Add View** on the panel toolbar.



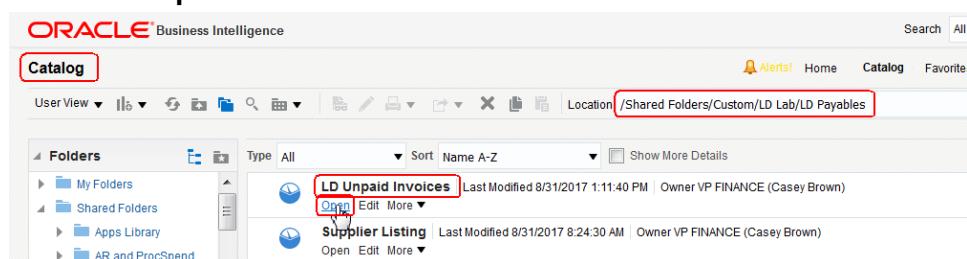
24. For the Table and Graph subsections within the Compound Layout section, click the Remove View from Compound Layout icon button.



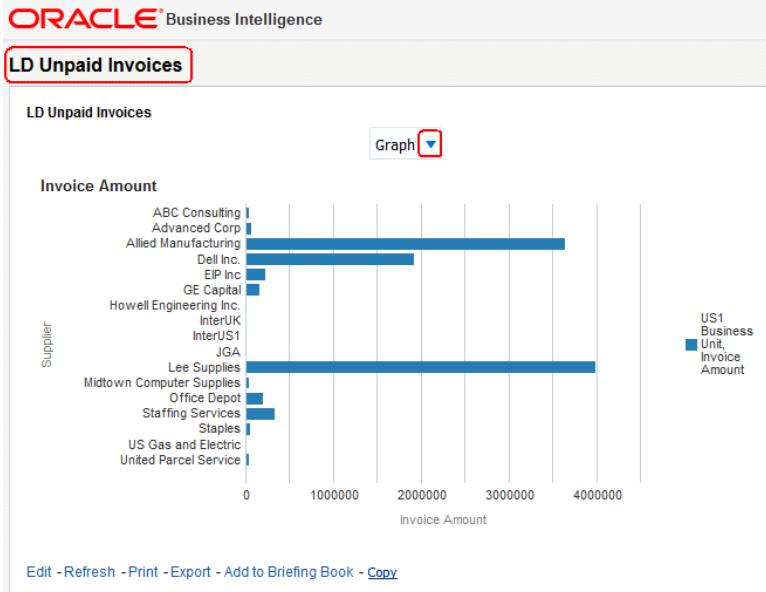
25. Click the Save Analysis icon button (diskette icon on the far right).
 26. Select Shared Folders > Custom > XX Payables.
 27. Enter XX Unpaid Invoices as the analysis name and click OK.



28. Click the Catalog link near the top of the page.
 29. Go to Shared Folders > Custom > XX Payables > XX Unpaid Invoices.
 30. Click Open.



31. Select Graph from the view selector to see the pie chart.



32. Select **Table** to go back to the table view.

ORACLE Business Intelligence

LD Unpaid Invoices

LD Unpaid Invoices

Table

Supplier: **ABC Consulting** ▾ Business Unit Name: **US1 Business Unit** ▾

Invoice Number	Invoice Date	Invoice Amount	Invoice Currency	Payment Status Name
ABC-07292015020	1/20/2016	894	USD	Not paid
ABC-07292015027	2/8/2016	894	USD	Not paid
ABC-07292015041	1/21/2016	894	USD	Not paid
ABC-07292015075	3/1/2016	894	USD	Not paid
ABC-07292015079	1/13/2016	894	USD	Not paid
ABC-07292015375	3/13/2016	894	USD	Not paid
ABC-08082016001	8/8/2016	559	USD	Not paid
ABC-10172016001	10/17/2016	559	USD	Not paid
AC-20966002	1/29/2016	5437	USD	Not paid
AC-54568002	1/29/2016	8671	USD	Not paid
Duplicate-440239	2/8/2016	894	USD	Not paid
OD-32985002	1/29/2016	3014	USD	Not paid

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

3.4 Copy Dashboard, Add View, and Edit Prompt Activity

Overview

In this practice, you will Make a copy of the **Payables Invoice Audit Listing** dashboard and all its contents, including its analysis and prompt, and place it in **Shared Folders > Custom**. Edit the copied dashboard so that it contains the copied analysis and prompt. Run and view the dashboard.

Create a line graph that has supplier as a graph prompt, the invoice amount as the y-axis, and the invoice date as the x-axis. Run and view the dashboard.

Edit the **Begin Invoice Date** prompt, including its logic and display text. Also edit the filter for the **Invoice Date** column in the **Payables Invoice Audit Listing** analysis so that it works with the updated prompt. Run and view the dashboard.

You want to customize the predefined Payables Invoice Audit Listing dashboard (but do not want to override the original) to show the trend of invoice amounts over time for a given supplier. You also want to edit the prompts so that instead of the Begin Invoice Date prompt, you have a date range prompt for invoice date.

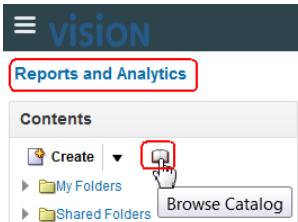
Assumptions

Sign in as your **FASXX.Student** user as assigned by the instructor.

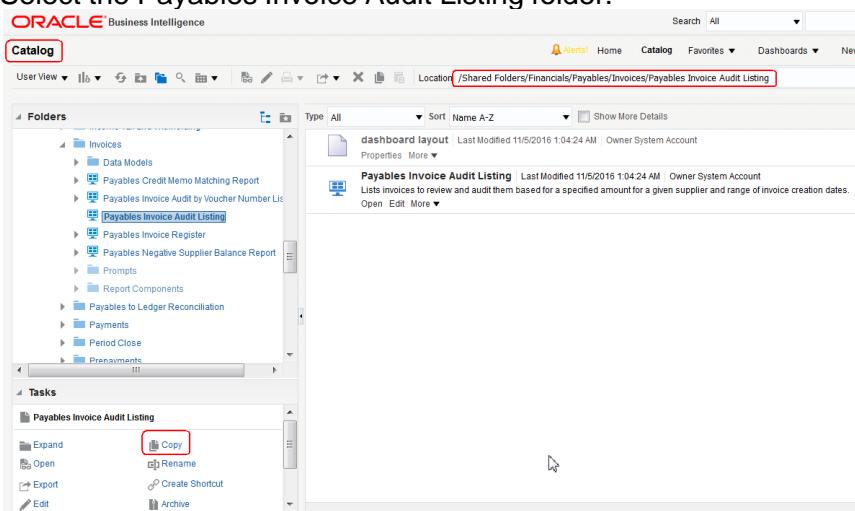
Tasks

Copy Dashboard:

1. Navigate to: Tools > Reports and Analytics.
2. Click the **Browse Catalog** icon button.

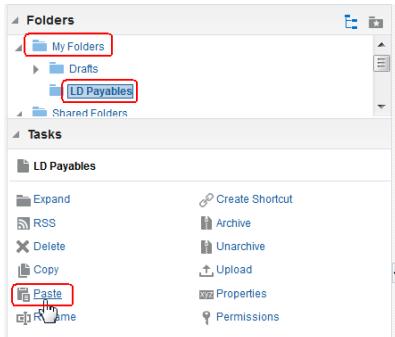


3. In the Folders panel, go to **Shared Folders > Financials > Payables > Invoices > Payables Invoice Audit Listing**.
4. Select the Payables Invoice Audit Listing folder.



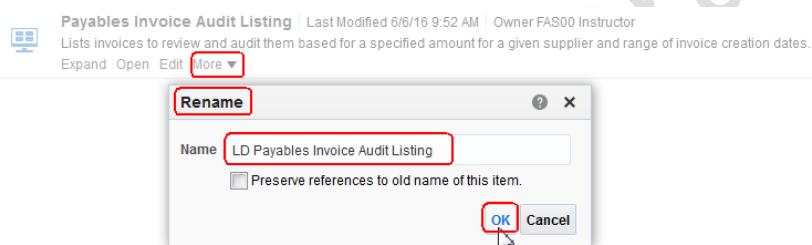
Note: Copy the folder from the Folders panel and not the file in the panel to the right.

5. Click the **Copy** icon button in the toolbar.
6. In the Folders panel, select the **XX Payables** folder in **Shared Folders > Custom**.
7. Click the **Paste** icon button in the toolbar.

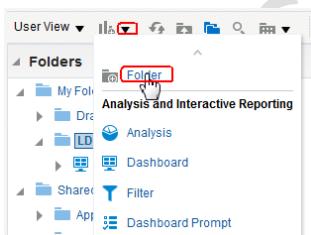


8. For the pasted Payables **Invoice Audit Listing** dashboard, click the **More** link and select **Rename**.

Enter **XX Payables Invoice Audit Listing** in the Name field and click the **OK** button.

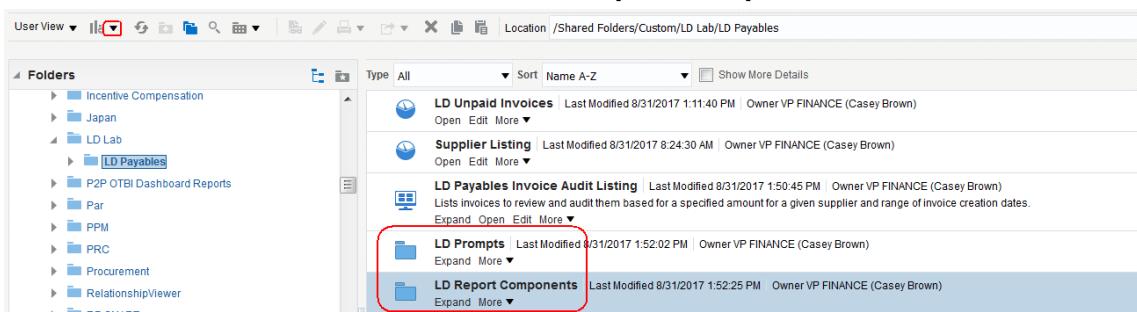


8. In the toolbar directly above the Folders panel, click the **New** icon button and select **Folder**.

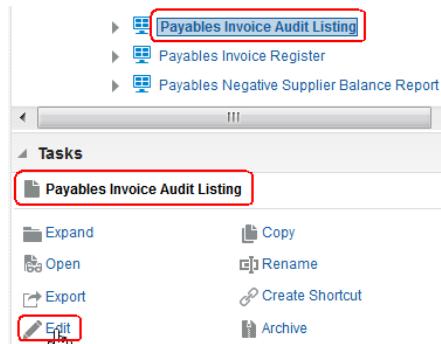


9. Enter **XX Prompts** in the Name field and click OK.

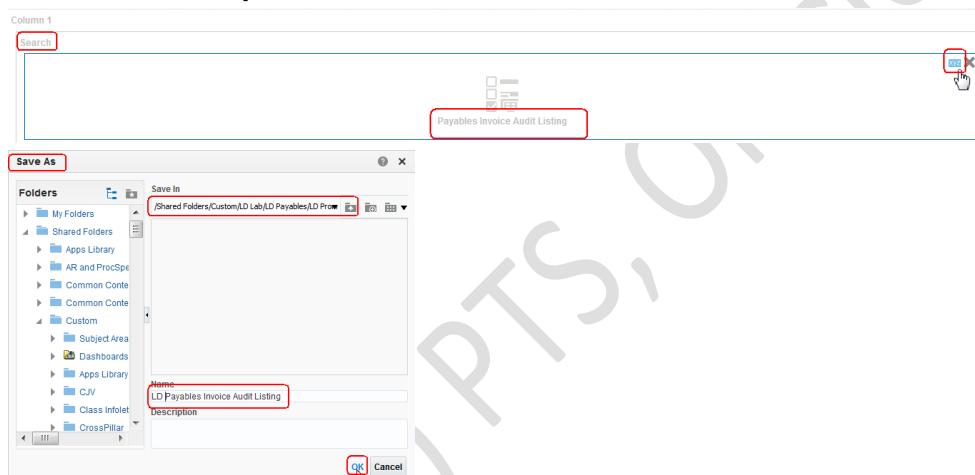
12. Create another folder with the name **XX Report Components**.



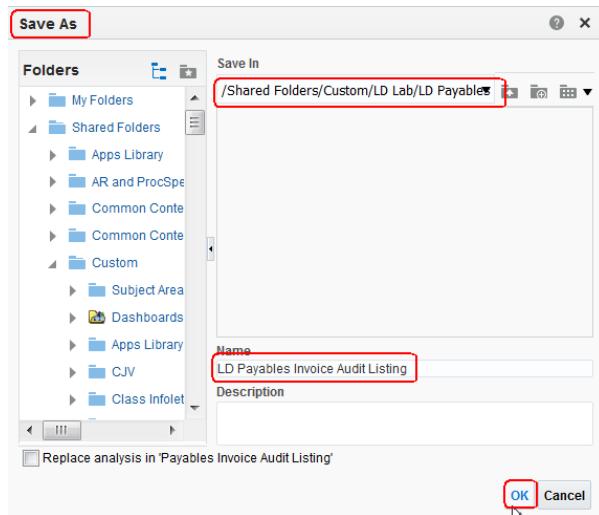
13. In the Folders panel, go to **Shared Folders > Financials > Payables > Invoices > Payables Invoice Audit Listing**. From the Open, Edit and More links available, click on the **Edit** link



14. Place your mouse on the icon representing the **prompt "Payables Invoice Audit Listing"** in the dashboard edit screen (Search Region), towards the right you will find a properties icon, click and select "**Edit**", the Prompt will open up for edit, from the top right select "**Save As**" icon and save this Prompt as "**XX Payables Invoice Audit Listing prompt**" under the "**XX Prompts**" folder created earlier



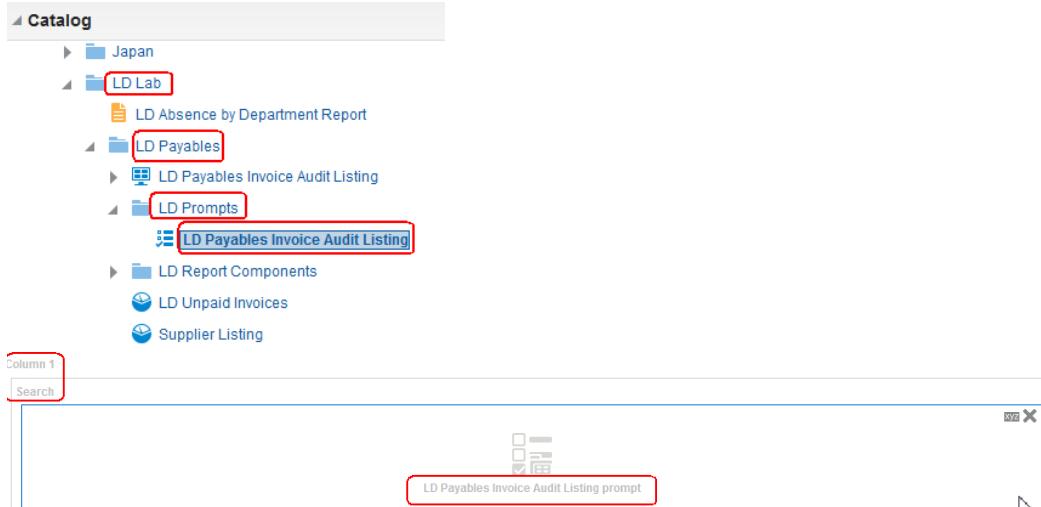
15. Place your mouse on the icon representing the compound view "**Payables Invoice Audit Listing**" in the dashboard edit screen (Section 1 Region), towards the right you will find a **properties** icon , click and select "**Edit Analysis**", the Analysis will open up for edit, from the top right select "**Save As**" icon and save this Analysis as "**XX Payables Invoice Audit Listing analysis**" under the "**XX Report Components**" folder created earlier



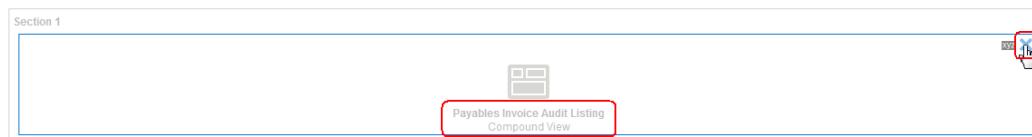
16. Go to **Shared Folders > Custom > XX Payables > XX Payables Invoice Audit Listing**.
17. Click the **Edit** link for the **Payables Invoice Audit Listing** dashboard.

18. Click the **Delete** icon button for the **Payables Invoice Audit Listing** dashboard prompt within the Search region. The button appears after you hover inside the region.
Note: Click **Delete** from the **Payables Invoice Audit Listing** region that is inside the Search region. Note that a delete icon is in each region.

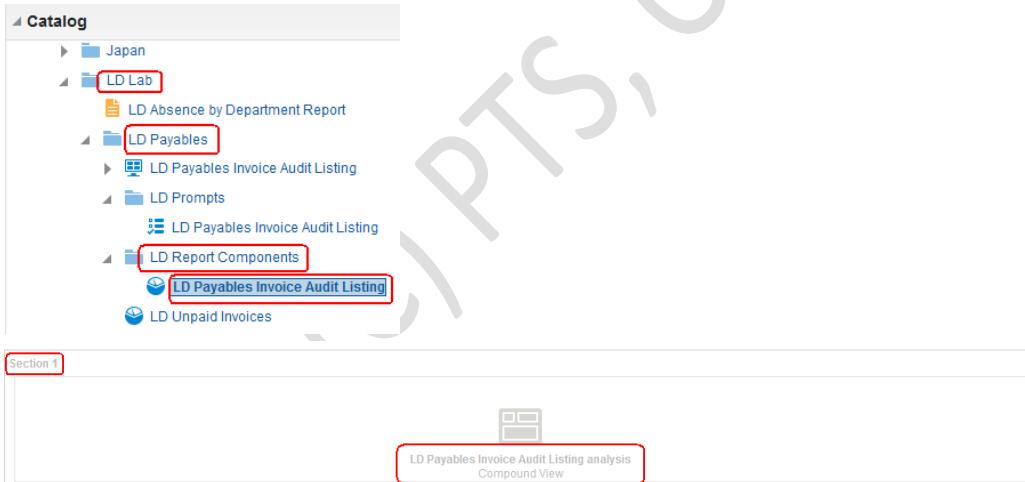
19. In the Catalog panel, select **Shared Folders > Custom > XX Payables > XX Prompts > "XX Payables Invoice Audit Listing prompt"** and drag it into the **Search** region.



20. Delete the **Payables Invoice Audit Listing** compound view within the **Section 1** region.



21. In the **Catalog** panel, select **Shared Folders > Custom > XX Payables > XX Report Components > “XX Payables Invoice Audit Listing analysis”** and drag it into the Section 1 region.



22. Click the **Save** icon button .

23. Click the **Run** button .

24. Select **USA1 Business Unit** for the **Business Unit** prompt and click the **Apply** button.

* Business Unit **US1 Business Unit** ▼ Invoice Type **Select Value--** ▼ Begin Invoice Date **Minimum Invoice Amount** **Apply** **Reset**

LD Payables Invoice Audit Listing

Invoice Number	Invoice Date	Currency	Invoice Amount	Invoice Type	Invoice Description	Supplier	Supplier Number	Voucher Number
0062724576	2/12/2014	USD	10.00	Payment request	Travelling Expenses	Sean Goodkin		
0064624612	2/13/2014	USD	25.00	Payment request	Client Meeting	Sean Goodkin		
0068942456	2/20/2014	USD	10.00	Payment request	Client Meeting	Chris Hooper		
0074067543	3/12/2014	USD	298.07	Payment request	Client Meeting	James Seller		
0074107604	3/21/2014	USD	770.00	Payment request	Travel to Pinnacle and Customer Dinner	Lisa Jones		
0115066208	11/13/2014	USD	0.00	Payment request	Trip: 11/10/2014 AOPNNF	James Seller		
0115066208.1	11/13/2014	USD	1,395.11	Payment request	Trip: 11/10/2014 AOPNNF	American Express		
0115066209	11/19/2014	USD	0.00	Payment request	Trip: 11/18/2014 GPXTJQ	James Seller		
0115066209.1	11/19/2014	USD	151.25	Payment request	Trip: 11/18/2014 GPXTJQ	American Express		
0118228105	10/1/2015	USD	15.00	Payment request	Customer Visit	James Seller		
0118228105.1	10/1/2015	USD	152.65	Payment request	Customer Visit	American Express		
0118228108	10/6/2015	USD	0.00	Payment request	Client Implementation	James Seller		
0118228108.1	10/6/2015	USD	772.01	Payment request	Client Implementation	American Express		

Create Graph View

25. Notice there is no **Edit** link at the bottom of the report

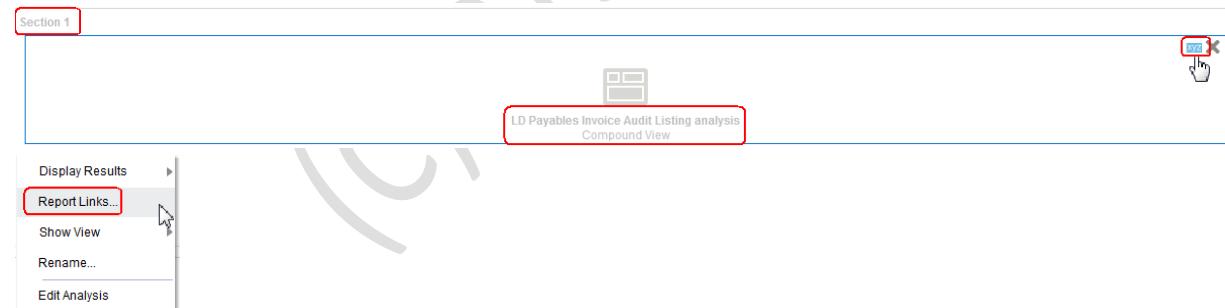
[Refresh](#) - [Print](#) - [Export](#) - [Add to Briefing Book](#) - [Copy](#)

LD Payables Invoice Audit Listing: Payables Invoice Audit Listing > LD Payables Invoice Audit Listing: Payables Invoice Audit Listing

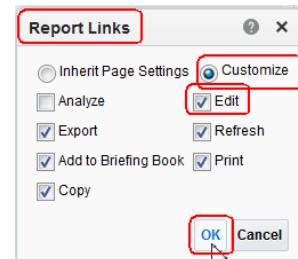
Click on [LD Payables Invoice Audit Listing: Payables Invoice Audit Listing](#) > [LD Payables Invoice Audit Listing: Payables Invoice Audit Listing](#)

Click on > Edit Dashboard

Go to **Section 1, Properties**



Report Links > Customize > select Edit > click OK



Click **Save** button > Click the **Run** button > Select **US1 Business Unit** for the **Business Unit** prompt and click the **Apply** button

Click the **Edit** link at the bottom of the report.

Notice there is “No data to display”

LD Payables Invoice Audit Listing analysis

Criteria **Results** Prompts Advanced

Subject Areas

- Payables Invoices - Trans:
- Accounting

Compound Layout
No data to display.
Refresh

You cannot add new visualization at this time, unless you modify the filter that restrict the data:

> Go to **Criteria** tab and check ‘Business Unit Name’ filter

Criteria Results Prompts Advanced

Subject Areas

- Payables Invoices - Trans:
 - Accounting
 - Business Unit
 - Distributions
 - Fiscal Calendar
 - Invoice Details
 - Invoice Lines
 - Ledger
 - Ledger Set
 - Legal Entity
 - Supplier
 - Supplier Site

Selected Columns

Header Information	Invoices General	Header Information	Supplier	Reference Information				
Invoice Number	Invoice Date	Currency	Invoice Amount	Invoice Type	Invoice Description	Supplier	Supplier Number	Voucher Number

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the filter button in the Filter pane header. Add a saved filter by clicking on add button after selecting its name in the catalog pane.

Business Unit Name is equal to / is in @{p_business_unit}

AND Invoice Type Name is prompted

AND ABS(Invoice Amount) is greater than or equal to @{p_min_amt}0

AND Cast("General Information"."Invoice Date" As Date) >= @{p_begin_inv_date}(current_date-15000)

> Go to the Filters pane and copy ‘Business Unit Name’ filter

Business Unit Name is equal to / is in @{p_business_unit}

> Then click on **Paste**

> Click on ‘AND’

Business Unit Name is equal to / is in @{p_business_unit}

AND Business Unit Name is equal to / is in @{p_business_unit}

> Check the ‘OR’ change and click on ‘Edit’

Business Unit Name is equal to / is in @{p_business_unit}

OR Business Unit Name is equal to / is in @{p_business_unit}

> Choose ‘US1 Business Unit’ and remove Variable Expr ‘p_business_unit’ and click ‘OK’

Edit Filter

Column: Business Unit Name /
Operator: is equal to / is in
Value: US1 Business Unit
Variable Expr: (default)
Add More Options ▾ Clear All

OK Cancel

> Make a final check of the Filters

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns name in the catalog pane.

Business Unit Name is equal to / is in @{p_business_unit}
 OR Business Unit Name is equal to / is in US1 Business Unit
 AND Invoice Type Name is prompted
 AND ABS(Invoice Amount) is greater than or equal to @{p_min_amt}{0}
 AND Cast("- General Information"."Invoice Date" As Date) >= {@{p_begin_inv_date}{current_date-15000}}

> Go to 'Results' tab and check the data

LD Payables Invoice Audit Listing analysis

Criteria **Metrics** Prompts Advanced

Subject Areas: Payables Invoices - Trans.

Compound Layout

Table

Invoice Number	Invoice Date	Currency	Invoice Amount	Invoice Type	Invoice Description	Supplier	Supplier Number	Voucher Number
0062724576	2/12/2014	USD	10.00	Payment request	Travelling Expenses	Sean Goodkin		
0064624612	2/13/2014	USD	25.00	Payment request	Client Meeting	Sean Goodkin		
0066942456	2/20/2014	USD	10.00	Payment request	Client Meeting	Chris Hooper		
0074067543	3/12/2014	USD	298.07	Payment request	Client Meeting	James Seller		
0074107604	3/21/2014	USD	770.00	Payment request	Travel to Pinnacle and Customer Dinner	Lisa Jones		

26. In the toolbar of the Views panel in the 'Results' tab (bottom left), click the New View icon button and select Graph > Line.

Compound Layout

Best Visualization

Recommended Visualization for >

- Title
- Table
- Pivot Table
- Performance Tile
- Treemap
- Trellis
- Graph**
- Bar
- Line**
- Gauge

PLEASE CHECK ERROR

If you have the 'View Display Error' in your environment just remove the 'Graph' view, click **Save** and go to lab 3.5

Compound Layout

Error

View Display Error
Exceeded configured maximum number of allowed output prompts, sections, rows, or columns.

Error Details

Refresh

Views Remove View from Analysis

Table Rename View Remove View from Analysis

Graph Remove View from Analysis

Otherwise just save the report with Table and Graph views.

3.5 Create a Dashboard and Prompt Activity

Overview

In this practice, you will create a dashboard for the Unpaid Invoices and Supplier Listing analyses. Run and view the dashboard.

Create a dashboard prompt with the Name attribute. Add filters for the Name column in the Unpaid Invoices and Supplier Listing analyses so that they work with the new prompt. Add the dashboard prompt to the dashboard, then run and view the dashboard.

Note: This optional activity can be performed only if you have already finished the Use the BI Composer and Create an Analysis, View, and View Selector activities.

You want to create a dashboard for the two custom analyses you created so that you have one report to open to view both analyses at the same time, but primarily so that you can have a supplier name prompt that applies to both analyses. When a supplier is selected, both analyses would present data specific to that supplier.

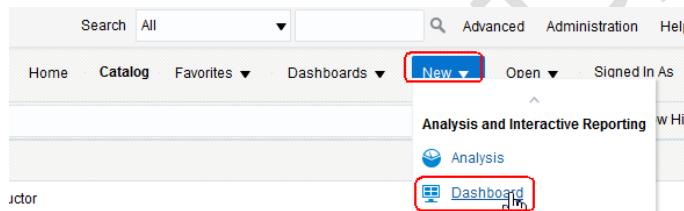
Assumptions

Sign in as your **FASXX.Student** user as assigned by the instructor.

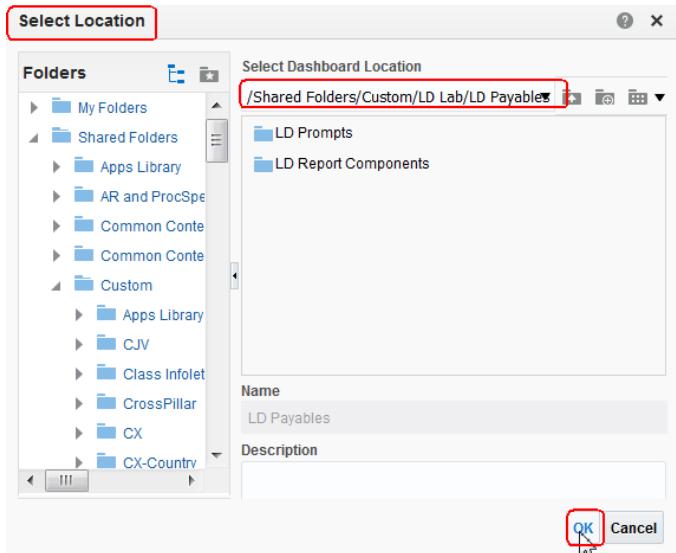
Tasks

Create Dashboard

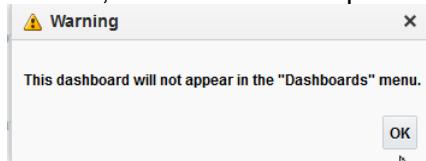
1. Navigate to: Tools > Reports and Analytics.
2. Click the **Browse Catalog** icon button in the toolbar.
3. From the **New** menu, select **Dashboard**.



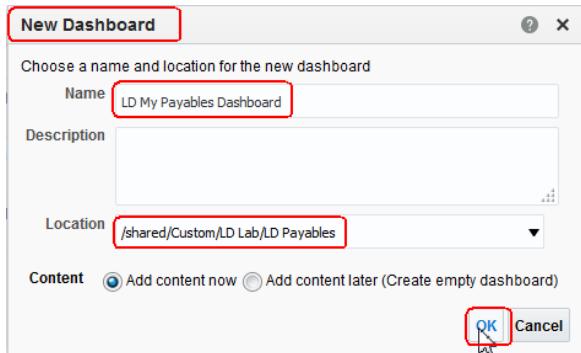
4. Enter **XX My Payables Dashboard** as the name for the dashboard.
5. For the location, select the **XX Payables** folder in **Shared Folders > Custom**.
6. Click **OK**.



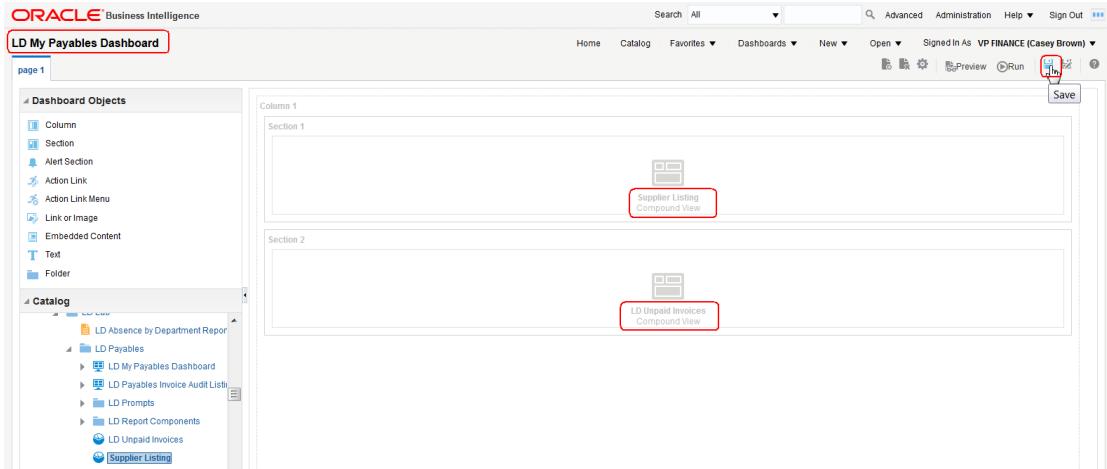
7. Dismiss the warning. The warning appears because the dashboard is to be saved in My Folders, and therefore not public and available in the list of dashboards.



8. Leave the **Add content now** option selected and click the **OK** button.



9. In the Catalog panel, open **Shared Folders > Custom > XX Payables**.
10. Drag in the **Supplier Listing analysis** you created to the panel on the right.
11. Drag the **XX Unpaid Invoices** analysis and drop it below the **Supplier Listing analysis**.
12. Click the **Save** icon button .



13. Click the **Run** button .

14. Click the **Catalog** link near the top of the page .

15. In the Folders panel, go to **Shared Folders > Custom > XX Payables** and select your dashboard.

16. Click the **More** link and select **Rename**.

17. Enter **XX My Payables Dashboard** (or choose a different name if you like) and click the **OK** button.

18. Return to the **Reports and Analytics** work area by selecting the tab in your browser.

This work area should be open already as the BI Catalog opens in a new tab.

19. Navigate to your custom dashboard in **Shared Folders > Custom > XX Payables** and view it from there.



Reports and Analytics

Contents

- ▶ Functional Setup
- ▶ GRC
- ▶ HCM
- ▶ HCM-Country
- ▶ HCM-Industry
- ▶ Human Capital Management
- ▶ Incentive Compensation
- ▶ Japan
- ▶ LD Lab
 - LD Absence by Department
 - LD Absence by Department Report.xdo
 - LD Calibration and Manager Ratings Comparison
 - LD Head Count by Department
 - LD Payables
 - LD My Payables Dashboard
- LD F
- LD F
- LD F
- LD U
- Suppl
- Number of Abs

Search

No

page 1

Type Dashboard

Created By VP FINANCE (Casey Brown)

View

More... View

vision

Reports and Analytics

Contents

Search page 1

Suppliers Supplier Listing

Supplier Number	Supplier	Site	Address Line 1	City	State	Postal Code	Country
1252	Lee Supplies	Lee US1	5000 CARTER DR	LOS ANGELES	CA	90032	US
1253	Staffing Services	Staffing US1	1144 LOGAN ST	DENVER	CO	80203	US
1254	JGA	JGA US1	600 5TH AVE	SEATTLE	WA	98104	US
1255	Dell Inc.	Dell US1	2300 GREENLAWN BLVD	ROUND ROCK	TX	78664	US
1256	US Gas and Electric	USGE US1	1144 LOGAN ST	DENVER	CO	80203	US
1257	Howell Engineering Inc.	Howell US1	1200 W WASHINGTON ST	PHOENIX	AZ	85007	US
1258	United Parcel Service	UPS US1	55 GLENLAKE PKWY	ATLANTA	GA	30328	US
1259	American Telephone and Telegraph	ATT US1	267 MARIETTA ST NW	ATLANTA	GA	30313	US
1260	Staples	Staples US1	500 STAPLES DR	FRAMINGHAM	MA	01702	US
1261	GE Capital	GE Capital US1	3135 EASTON PKW	FAIRFIELD	CT	06438	US
1262	EIP Inc	EIP US1	145 VAN NESS AVE	SAN FRANCISCO	CA	94102	US
1263	Advanced Corp	AC US1	5500 STATE ST	BOSTON	MA	02109	US
1264	Office Depot	OD US1	6600 N MILITARY TRL	BOCA RATON	FL	33496	US
1265	Allied Manufacturing	Allied US1	1600 E WARREN AVE	DETROIT	MI	48207	US
1266	Midtown Computer Supplies	MCS US1	25 PECK ST	PROVIDENCE	RI	02903	US
1267	Metal Works	Metal Works US1	1200 GRANT ST	PITTSBURGH	PA	15219	US

Note: The Name column in the screen shot is now **Supplier**.

Create Dashboard Prompt

20. Click the **Browse Catalog** icon button in the Reports and Analytics work area.
21. From the **New** menu, select **Dashboard Prompt**.

Search All

Advanced Administration

Home Catalog Favorites Dashboards New Open Signed In

Analysis and Interactive Reporting

Analysis

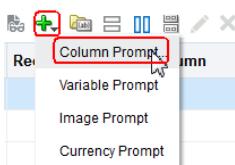
Dashboard

Filter

Dashboard Prompt

Condition

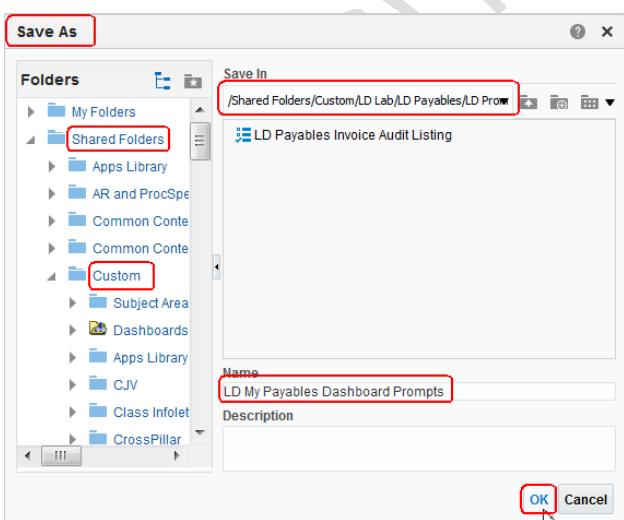
22. Select the **Payables Invoices - Transactions Real Time** subject area.
23. In the Definition region, click the **New** icon button and select **Column Prompt**.



24. Select **Supplier** under the Supplier folder and click the **OK** button twice.



25. Click the **Save Prompt** icon button .
26. In the Folders panel, go to **Shared Folders > Custom > XX Payables > XX Prompts**.
27. Enter **XX My Payables Dashboard Prompts** in the Name field.
28. Click the **OK** button.



Add Filters

29. Click the **Catalog** link near the top of the page.
30. In the Folders panel, go to **Shared Folders > Custom > XX Payables**.
31. Click the **Edit** link for the **Supplier Listing** analysis.

The screenshot shows the Oracle BI Catalog interface. The top navigation bar includes 'Catalog' (highlighted with a red box), 'Alerts', 'Home', 'Catalog', and 'Favorites'. The location bar shows '/Shared Folders/Custom/LD Lab/LD Payables'. The main area displays a tree view of 'Folders' on the left and a list of analyses on the right. The 'LD Payables' folder is expanded, showing its contents: 'LD My Payables Dashboard', 'LD Payables Invoice Audit Listing', 'LD Prompts', 'LD Report Components', 'LD Unpaid Invoices', and 'Supplier Listing'. The 'Supplier Listing' analysis is highlighted with a red box.

32. Select the **Criteria** tab.
33. In the **Selected Columns** section, for the **Supplier** column, open the contextual menu and select **Filter**.
34. In the **Operator** field, select **is prompted**.
35. Click the **OK** button.

This screenshot shows the 'Selected Columns' dialog box. It has sections for 'Selected Columns' and 'Filters'. Under 'Selected Columns', there is a table with columns 'Supplier', 'Supplier Number', 'Site', and 'Address Line'. A 'New Filter' button is highlighted with a red box. Under 'Filters', there is a table with a single row: 'Column: Supplier fx' and 'Operator: is prompted'. The 'OK' button at the bottom is also highlighted with a red box.

36. Click the **Save Analysis** icon button .
37. Click the **Catalog** link.
38. In the Folders panel, go to **Shared Folders > Custom > XX Payables**.
39. Click the **Edit** link for the **XX Unpaid Invoices** analysis .
40. Select the **Criteria** tab.
41. In the Selected Columns section, for the **Supplier** column, open the contextual menu and select **Filter**.
42. In the **Operator** field, select **is prompted**.
43. Click the **OK** button.

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis over the button next to its name.

Supplier	Business Unit	General Information
<input checked="" type="checkbox"/> Supplier	<input type="checkbox"/> Business Unit Name	<input type="checkbox"/> Invoice Number

New Filter

Column: Supplier

Operator: is prompted

OK Cancel

44. Click the **Save Analysis** icon button .

Add Dashboard Prompt to Dashboard

45. Click the **Catalog** link near the top of the page.

46. In the Folders panel, go to **Shared Folders > Custom > XX Payables > XX My Payables Dashboard**.

47. Click the **Edit** link for the **XX My Payables Dashboard**.

Catalog

User View ▾ Location /Shared Folders/Custom/LD Lab/LD Payables

Folders Type: All Sort: Name A-Z Show More Details

- My Folders
- Shared Folders

LD My Payables Dashboard Last Modified 9/1/17 5:17 AM | Owner VP FINANCE (Casey Brown)
Expand Open Edit More

48. In the Catalog panel, go to **Shared Folders > Custom > XX Payables > XX Prompts**.

49. Select the **XX My Payables Reports dashboard prompt** and drag it above the Section 1 region.

ORACLE Business Intelligence

LD My Payables Dashboard

Search: All Advanced Admin

Home Catalog Favorites Dashboards New Open Signed In A

page 1

Dashboard Objects: Column, Section, Alert Section, Action Link, Action Link Menu, Link or Image, Embedded Content, Text, Folder.

Catalog: LD Payables, LD My Payables Dashboard, LD Payables Invoice Audit List, LD Prompts, LD My Payables Dashboard, LD Payables Invoice Audit, LD Report Components, LD Unpaid Invoices, Supplier Listing.

Section 3: LD My Payables Dashboard Prompts

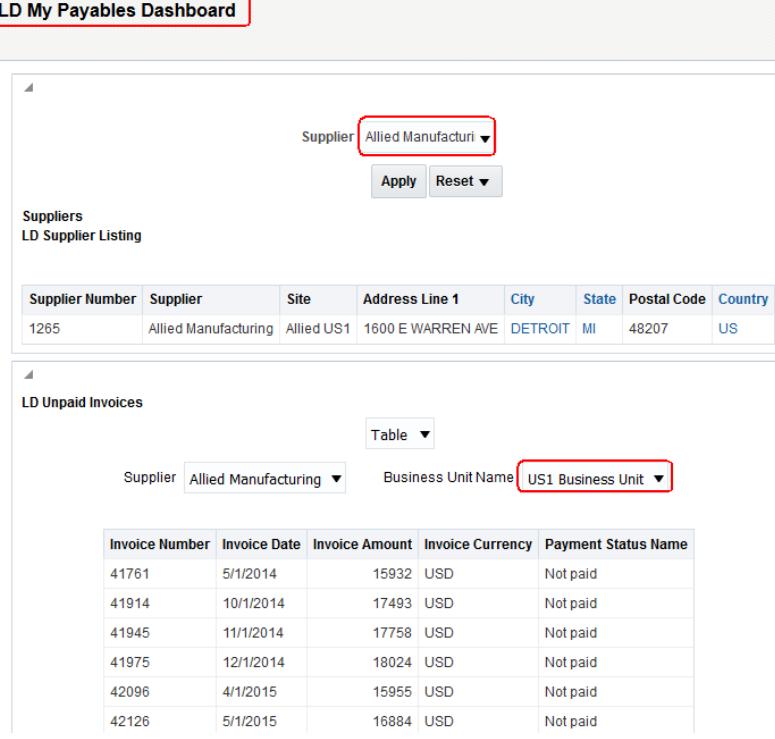
Section 1: Supplier Listing Compound View

Section 2: LD Unpaid Invoices Compound View

50. Click the **Save** icon button.

51. Click the **Run** button .
52. Select **Allied Manufacturing** for the **Supplier** field.
53. Click the **Apply** button. If the system stops responding, go back into the catalog and run it again. Select '**US1 Business Unit**' value in '**XX Unpaid Invoices**' analysis.
Note: The dashboard prompt applies to both analyses in the dashboard. The Unpaid Invoices analysis itself has prompts that you can also use to filter the data in that analysis only.

LD My Payables Dashboard



The screenshot shows the LD My Payables Dashboard interface. At the top, there are two dropdown menus: 'Supplier' set to 'Allied Manufacturing' and 'Business Unit Name' set to 'US1 Business Unit'. Below these are 'Apply' and 'Reset' buttons. The first section, 'Suppliers', displays a table with one row for 'Allied Manufacturing' with details: Supplier Number 1265, Site Allied US1, Address Line 1 1600 E WARREN AVE, City DETROIT, State MI, Postal Code 48207, and Country US. The second section, 'LD Unpaid Invoices', displays a table with six rows of invoice data:

Invoice Number	Invoice Date	Invoice Amount	Invoice Currency	Payment Status Name
41761	5/1/2014	15932	USD	Not paid
41914	10/1/2014	17493	USD	Not paid
41945	11/1/2014	17758	USD	Not paid
41975	12/1/2014	18024	USD	Not paid
42096	4/1/2015	15955	USD	Not paid
42126	5/1/2015	16884	USD	Not paid

LD My Payables Dashboard: page 1 > LD My Payables Dashboard: page 1

Note: The Name column in the screen shot is now Supplier.

Lab 4: Working with OTBI Analytics (Oracle Sales Cloud)

Goals

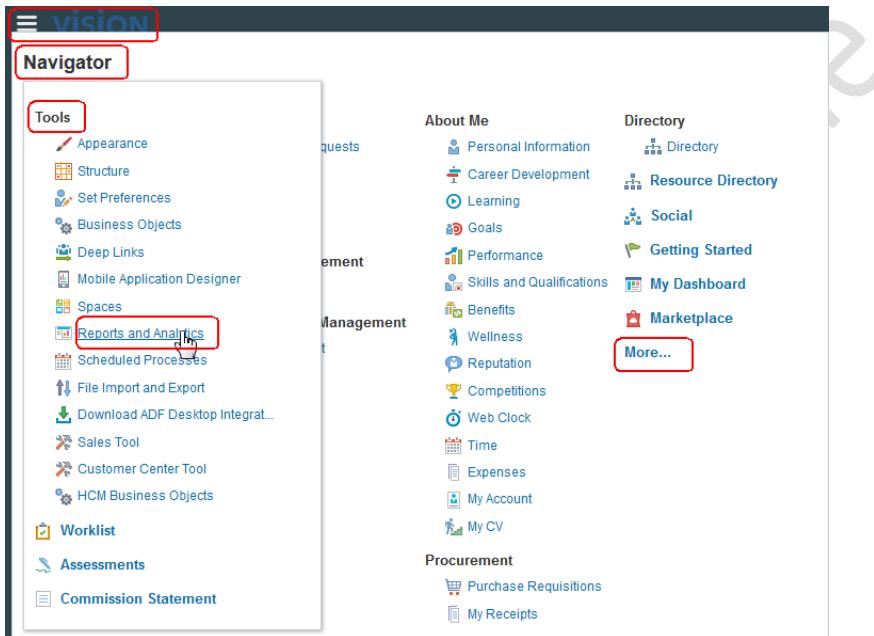
- Access an Oracle Sales Cloud report
 - Observe a variety of report formats

Overview

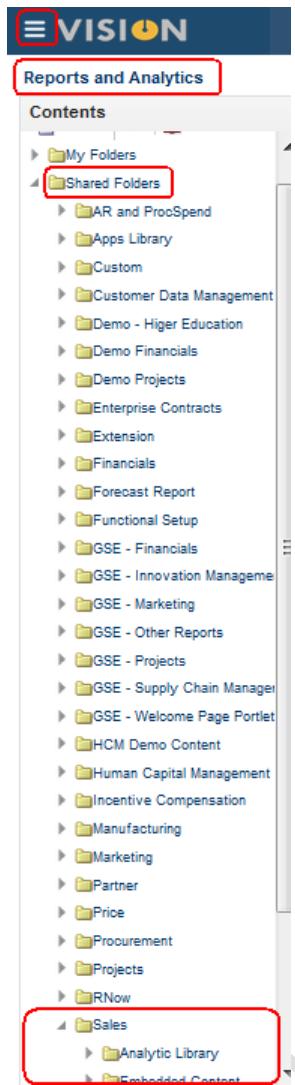
In this practice you will generate reports from the report catalog.

4.1 Accessing and Navigating OTBI Reports

1. Sign in to the application using **Lisa.Jones** login.
 2. Generate a tabular report.
 - a. Navigate to **Reports and Analytics**.

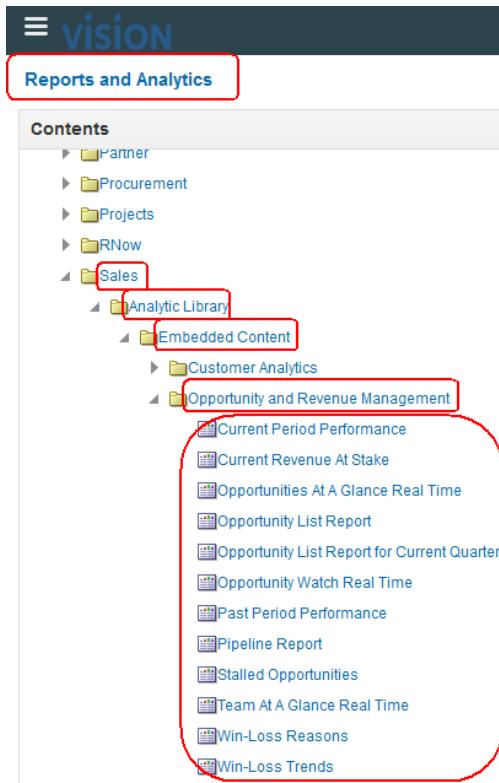


- b. In the regional area, expand **Shared Folders**.
 - c. Expand **Sales**. You may need to scroll down in the Contents area to see sales.



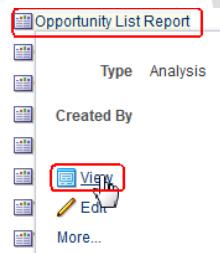
- d. Expand **Analytic Library > Embedded Content > Opportunity and Revenue Management**.

These are as-delivered reports intended to be included in opportunity and revenue management pages.



- e. Click **Opportunity List Report**.

- f. Click View.



- g. In the local area, notice that a new tab labeled "**Opportunity List Report**" is created.
h. After a few moments, observe that a tabular report with opportunities grouped by year, Sales Method, Sales Stage, and Customer is shown.

Search **Opportunity List Report**

Opportunity List Report

Enterprise Year	Sales Method Name	Sales Stage Name	Customer Name	Name	Product Name	Revenue Status	Win Probability (%)	Close Date	Opportunity Line Revenue	Sales Credit	Name	Territory Name
2015	Standard Sales Process	06 - Negotiation	Aloha Dairy Queen	Enterprise CRM Implementation	Sentinel Power Server 1000	OPEN	90	6/30/15	\$50,000	Lisa Jones	West - Products - Div I	
			Pacific Cardiology	Tablet Upgrade	Vario 8500 Tablet	OPEN	90	7/17/15	\$52,000	Lisa Jones	West - Products - Div I	
			Stryker Corporation	Hosted Services Delivery Platform	Sentinel Power Server 1000	OPEN	70	2/15/15	\$25,000	Lisa Jones	West - Products - Div I	
			System Solutions	Cloud Computing Deployment	Green Server 1000	OPEN	90	11/1/15	\$70,000	Lisa Jones	West - Products - Div I	
	07 - Closed		Aloha Dairy Queen	Initial System Implementation	Sentinel Power Server 3000	WON	100	9/19/15	\$456,000	Lisa Jones	West - Products - Div I	
			Axcense Software	Knowledge Mgt. and Training Center	Ultra Power Server 4000	WON	100	1/31/15	\$800,000	Lisa Jones	West - Products - Div I	
			Bada Restaurants Inc	Data Center Process Automation	Green Server 1000	WON	100	2/4/15	\$310,000	Lisa Jones	West - Products - Div I	
			Costova Networks	New Customer Service Center	Sentinel Power Server 3000	WON	100	9/30/15	\$850,000	Lisa Jones	West - Products - Div I	

3. Sort a report after it has been generated.

- a. Notice that the as-generated report is sorted by **customer name** in ascending order.
- b. Move the cursor over the “**Customer Name**” column header until the sort ascending, sort descending icons appear.

VISION

Reports and Analytics

Contents

Search **Opportunity List Report**

Opportunity List Report

Enterprise Year	Sales Method Name	Sales Stage Name	Customer Name	Name	Product Name	Revenue Status	Win Probability (%)	Close Date	Opportunity Line Revenue	Sales Credit	Name	Territory Name
2015	Standard Sales Process	06 - Negotiation	Aloha Dairy Queen	Enterprise CRM Implementation	Sentinel Power Server 1000	OPEN	90	6/30/15	\$50,000	Lisa Jones	West - Products - Div I	
			Pacific Cardiology	Tablet Upgrade	Vario 8500 Tablet	OPEN	90	7/17/15	\$52,000	Lisa Jones	West - Products - Div I	
			Stryker Corporation	Hosted Services Delivery Platform	Sentinel Power Server 1000	OPEN	70	2/15/15	\$25,000	Lisa Jones	West - Products - Div I	
			System Solutions	Cloud Computing Deployment	Green Server 1000	OPEN	90	11/1/15	\$70,000	Lisa Jones	West - Products - Div I	
	07 - Closed		Aloha Dairy Queen	Initial System Implementation	Sentinel Power Server 3000	WON	100	9/19/15	\$456,000	Lisa Jones	West - Products - Div I	
			Axcense Software	Knowledge Mgt. and Training Center	Ultra Power Server 4000	WON	100	1/31/15	\$800,000	Lisa Jones	West - Products - Div I	
			Bada Restaurants Inc	Data Center Process Automation	Green Server 1000	WON	100	2/4/15	\$310,000	Lisa Jones	West - Products - Div I	
			Costova Networks	New Customer Service Center	Sentinel Power Server 3000	WON	100	9/30/15	\$850,000	Lisa Jones	West - Products - Div I	

- c. Click the Sort Descending  icon.
- d. Verify that the rows in the table are re-sorted.
- e. Observe how Oracle Sales Cloud reports group similar values of a column together.

Search **Opportunity List Report**

Opportunity List Report

Enterprise Year	Sales Method Name	Sales Stage Name	Customer Name	Name	Product Name	Revenue Status	Win Probability (%)	Close Date	Opportunity Line Revenue	Sales Credit	Name	Territory Name
2015	Standard Sales Process	07 - Closed	USC Computer Services	SOA Infrastructure Conversion	Sentinel Power Server 7500	WON	100	4/1/15	\$850,000	Lisa Jones	West - Products - Div I	
				New Customer Service Center	Sentinel Power Server 3000	OPEN	10	10/11/16	\$756,000	Lisa Jones	West - Products - Div I	
				Hardware Upgrade Project	Sentinel Power Server 1000	OPEN	20	4/3/16	\$60,000	Lisa Jones	West - Products - Div I	
				USC Computer Services - Vision Cloud Mgt Software	Vision Cloud Management Software	WON	100	4/27/16	\$140,000	Lisa Jones	West - Products - Div I	
2015	Standard Sales Process	06 - Negotiation	System Solutions	Cloud Computing Deployment	Green Server 1000	OPEN	90	11/1/15	\$70,000	Lisa Jones	West - Products - Div I	
2016	Standard Sales Process	01 - Qualification		Human Capital BI Data Warehouse	Sentinel Power Server 7500	OPEN	10	3/30/16	\$650,000	Lisa Jones	West - Products - Div I	
		05 - Agreement		Data Server Expansion Project	Sentinel Power Server 1000	OPEN	70	11/6/16	\$130,000	Lisa Jones	West - Products - Div I	

- f. Sort the table by ascending order of **Sales Stage Name**.
- g. Restore the table to its original order by sorting **Customer Name** in ascending order.
- h. Close the **Opportunity List Report** tab.

The screenshot shows the Oracle BI Cloud Service interface. At the top, there's a dark blue header with the 'VISION' logo. Below it, a navigation bar says 'Reports and Analytics'. On the left, there's a 'Contents' sidebar with options like 'Create', 'My Folders', and 'Shared Folders'. The main area is titled 'Opportunity List Report'. At the bottom, there's a table with columns: Enterprise Year, Sales Method Name, Sales Stage Name, and Customer Name. A red box highlights the 'Opportunity List Report' tab in the top navigation bar.

Note:

Before go to the next lab please check: Shared Folders/Sales/Analytic Library and check for folders: Competitors/Customers/Pipeline

The screenshot shows the Navigator interface. On the left, there's a tree view under the 'Sales' folder. The 'Analytic Library' folder and its subfolders 'Competitors', 'Customers', 'Demand Generation', 'Embedded Content', 'Pipeline', and 'Sales Effectiveness' are all highlighted with red boxes. The 'Siebel Content' folder is also visible but not highlighted.

If the folders are missing, then you might need to import the whole **Analytic Library** folder from this location or just check if you see the folders with your **FASxx.Student**

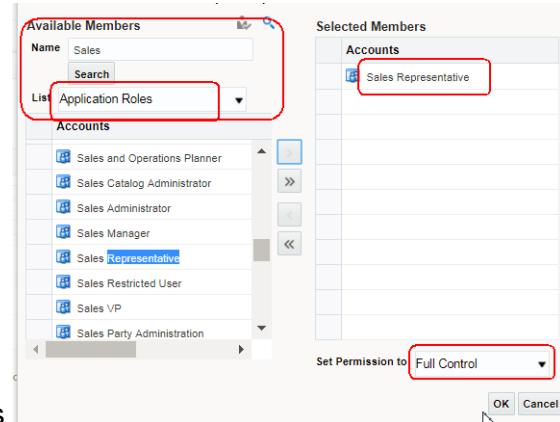
https://beehiveonline.oracle.com/content/dav/Oracle/Oracle_Business_Intelligence_Cloud_Service_Training_Workspace_FY18/Documents/OTBI/Labs/Files/Analytic%20Library.catalog

Lisa Jones doesn't have the unarchive privilege, so you are going to login as your **FASxx.Student**:

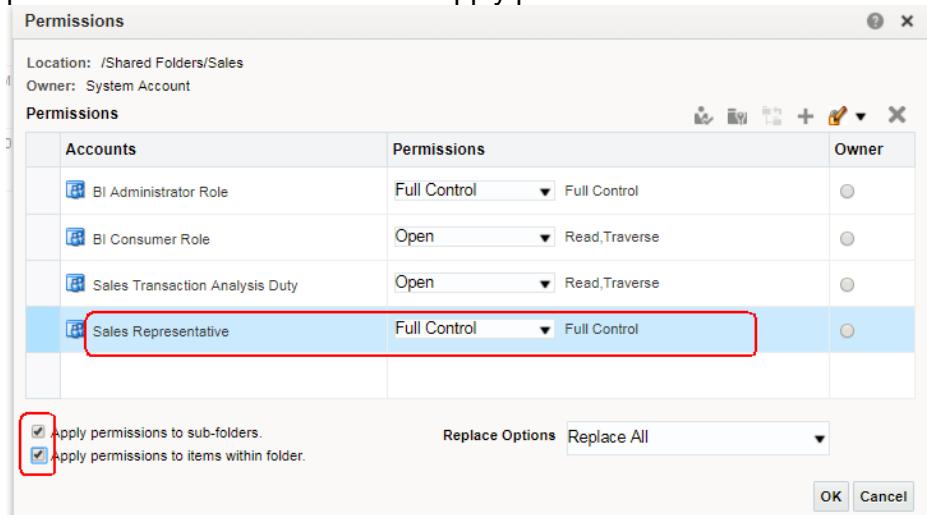
1. Change the catalog permission
 - Login as **FASxx.Student**
 - Navigator > Tools > Reports and Analytics > Browse Catalog
 - From Catalog go to: Shared Folder > Sales

The screenshot shows the Navigator interface. On the left, there's a tree view under the 'Sales' folder. The 'Subject Area Contents', 'Dashboards', and 'Analytic Library' are listed. On the right, there's a 'Tasks' panel with several options: Expand, Archive, RSS, Unarchive, Delete, Upload, Copy, Properties, Rename, and Permissions. The 'Permissions' option is highlighted with a red box.

- Go to **Tasks > Permissions**



- Check the default permissions
- Add “**Sales Representative role**” permission to “**Full Control**” and also **check “Apply permissions to sub-folders” and “Apply permissions to items within folder”**



- Click **OK**

2. Import the catalog (only if **folders: Competitors/Customers/Pipeline are missing**):

- Login as **FASxx.Student**
- **Navigator > Tools > Reports and Analytics > Browse Catalog**
- From Catalog go to: **Shared Folder > Sales**
- Go to **Tasks > Unarchive**

The screenshot shows the Oracle Business Intelligence Catalog interface. The left sidebar has sections for 'Folders' (Marketing, Partner, Procurement, Projects, RNow, Sales) and 'Tasks' (Expand, RSS, Delete, Copy, Rename, Create Shortcut). The main area shows a list of items under 'Shared Folders/Sales': Analytic Library, Analytic Library.customized_20170517_091754, Embedded Content, Embedded Content.customized_20170517_091754, Subject Area Contents, and QuoteReport. The 'Sales' folder is selected. A context menu is open over the 'Sales' folder, with 'Unarchive' highlighted. The 'Unarchive' dialog box is shown, containing fields for 'Archive file' (set to 'Analytic Library.catalog'), 'Replace' (set to 'None'), and 'ACL' (set to 'Inherit'). The 'OK' button is highlighted.

- Browse for your Analytic Library.catalog file
- Go to: **Shared Folders/Sales/Analytic Library** and check for folders: **Competitors/Customers/Pipeline**

4. Generate a bar graph report.

Sign in to the application using **Lisa.Jones** login > Go to **Reports and Analytics**
/Shared Folders/Sales/Analytic Library/Competitors

- In the regional area, under **Sales > Analytic Library > Competitors**
- Click **Win Loss Trend**.
- Click **View**.

Reports and Analytics

Contents

- ▶ **Incentive Compensation**
- ▶ **Manufacturing**
- ▶ **Marketing**
- ▶ **Partner**
- ▶ **Price**
- ▶ **Procurement**
- ▶ **Projects**
- ▶ **RNow**
- ▶ **Sales**
 - ▶ **Analytic Library**
 - ▶ **Competitors**
 - Closed & Lost Revenue Trend
 - Current Year Win Rate
 - Reason Lost
 - Reason Won
 - Recent Competitive Wins
 - Win Loss Scorecard
 - **Win Loss Trend**
- ▶ **Embedded**
- ▶ **Created By**
- ▶ **QuoteRe**
- ▶ **Subject A**
- ▶ **View**

d. Observe in the local area that a report displaying a bar graph appears under a tab labeled Win Loss Trend.

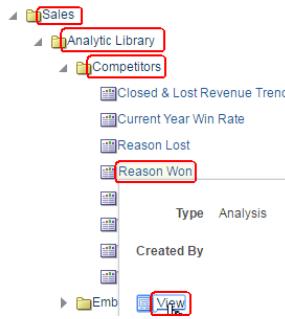
e. Hover the cursor over one of the bars in the bar graph, and observe that the values of the dependent and independent variables are displayed in a popup box.



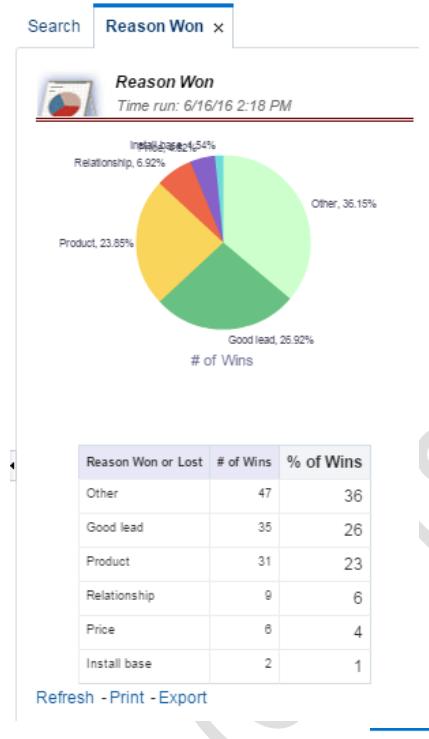
f. Close the Win Loss Trend tab

5. Generate a pie chart report.

- In the regional area, under **Sales > Analytic Library > Competitors**, click **Reason Won**.
- Click **View**.



- c. Observe that a report displaying a pie chart and a table appears under a new tab in the local area.



- d. Close the **Reason Won** tab
 6. Remain signed in to the application for the next practice.

4.2 Examining Dashboard Infolets

Goals

- Examine the **infolets** included in the dashboard for the classroom environment

Overview

In this practice, you will examine the infolets provided in the dashboard that has been configured for the classroom environment. The dashboard on your system may include different infolets. You will learn to configure infolets in the dashboard in a subsequent practice.

Assumptions

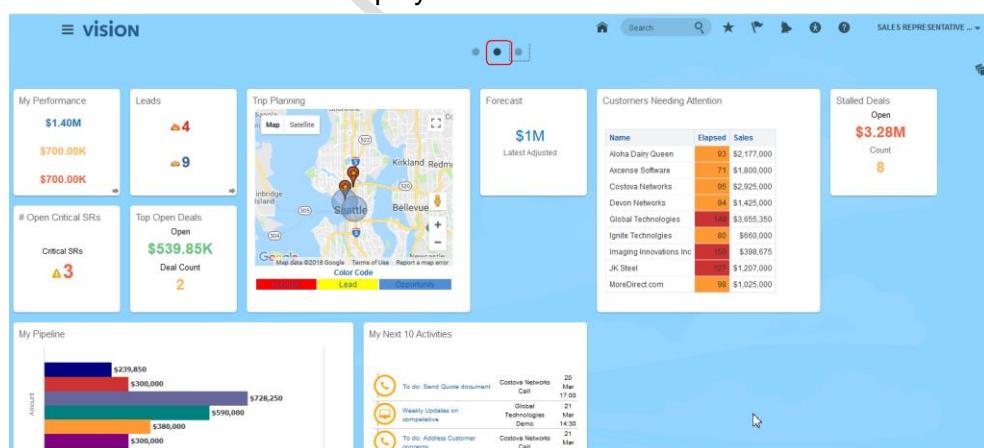
This is an **optional** practice. If you are pressed for time or believe that you understand this content, please skip this practice.

Tasks

1. Sign out of the application.
2. Sign in again as Lisa Jones with User ID = **lisa.jones**.
You are signing in as **Lisa Jones** because **she has pre-seeded data** in the classroom image. Please be aware that every student in the classroom is signing in as **Lisa Jones**, so you should be careful not to modify any data while logged in as her.
3. Open **Sales Infolets**



5. Please check the displayed infolets



6. Examine each infolet provided in the dashboard
7. Remain signed in to the application for the next practice.

4.3 Add an Infolet to the Dashboard

Goals

- Add an infolet to the dashboard

Overview

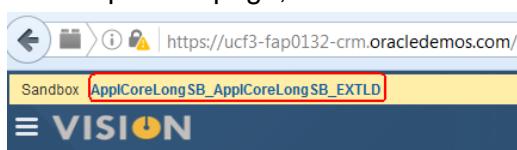
In this practice, you will select two existing reports and create an infolet that displays them in a dashboard.

The method is identical if you are creating custom reports to put in an infolet: You first create a report that displays a performance tile (a Performance Tile Report), then a report to display when the user drills down on the tile. Once these reports are saved, you follow the techniques in this practice to add them to an infolet.

Tasks

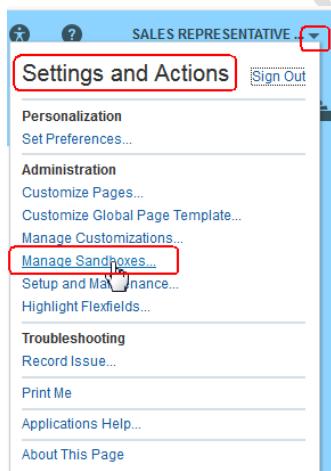
1. Verify that you are in a sandbox.

- a. At the top of the page, check for a sandbox tag.



- b. If you do not see a sandbox:

- 1) Expand the drop-down under your user name.
- 2) From the drop-down, select Manage Sandboxes.



- 3) Select the sandbox AppICoreLongSB_EXTnn, where nn is your student initials.

If you do not see this sandbox, create it. **Actions > New**



4) Click **Set as Active**.

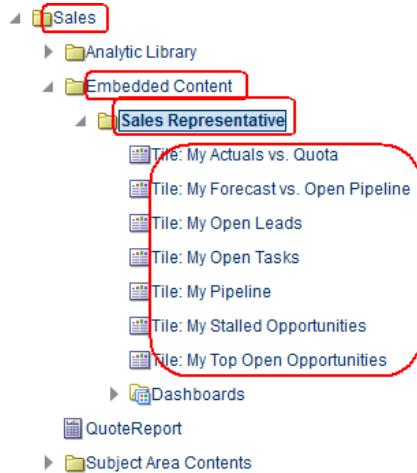
5) Log out and log in again (if necessary).

- Sandbox **AppCoreLongSB_LD**
- = vision**
2. Select a performance tile report for your infolet.
 - a. Navigate to Tools > Reports and Analytics.

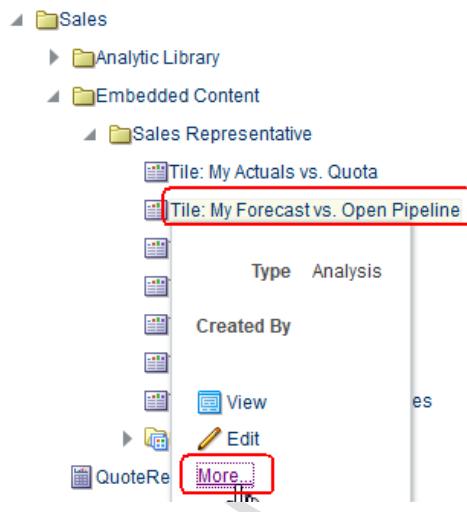
b. In the regional area, expand **Shared Folders**.

You should store infolet reports in Shared Folders to make them visible to others.

c. Expand Shared > Sales > Embedded Content > Sales Representative.



- d. Notice the number of tile reports already available to sales representatives. You will replace the existing forecast infolet.
- e. **Select Tile: My Forecast vs. Open Pipeline.**
- f. Click **More**. A new browser tab for Oracle Business Intelligence opens.
- g. In the local area, under Tile: My Forecast vs. Open Pipeline, select **More > Properties**.



The screenshot shows the Oracle Business Intelligence Catalog interface. On the left, there's a sidebar with 'Folders' and 'Tasks'. The main area lists various dashboards and tiles. One tile, 'Tile: My Forecast vs. Open Pipeline', is highlighted with a red box. A context menu is open over this tile, with 'Properties' also highlighted with a red box.

- h. In the Properties dialog, notice the path to your report:

The Properties dialog is shown for the 'My Forecast vs. Open Pipeline' report. The 'Location' field is highlighted with a red box and contains the path '/shared/Sales/Embedded Content/Sales Representative'. The 'OK' button at the bottom right of the dialog is also highlighted with a red box.

Name: **My Forecast vs. Open Pipeline**

Location: **/shared/Sales/Embedded Content/Sales Representative**

You will need to enter this path plus the report name when creating the infolet.

- i. Click Cancel.
3. Select a detail report for your infolet.
 - a. In the regional area, expand Sales Representative.

- b. Expand Dashboards
- c. Select My Top Open Opportunities.

The screenshot shows the Oracle Business Intelligence Catalog interface. The left sidebar displays a navigation tree under 'Folders' for 'Sales Representative'. A red box highlights the 'Dashboards' folder. The main pane lists several reports, with 'My Top Open Opportunities' highlighted by a red box. The location bar at the top shows the path: /Shared Folders/Sales/Embedded Content/Sales Representative/Dashboards.

Name	Last Modified	Owner
My Performance	10/27/15 8:16 AM	Owner
My Pipeline	10/27/15 8:16 AM	Owner
My Stalled Opportunities	10/27/15 8:16 AM	Owner
My Top Accounts by Open Opportunities	10/27/15 8:16 AM	Owner
My Top Open Opportunities	10/27/15 8:16 AM	Owner
My Unaccepted Leads by Age	10/27/15 8:16 AM	Owner
My Won Opportunities	10/27/15 8:16 AM	Owner
Top Accounts by My Activities	10/27/15 8:16 AM	Owner

- d. In the local area, for the **My Top Open Opportunities** report, select **More > Properties**.
You will add this as your detail report.
- e. Make a note of the path to this report.

The screenshot shows the 'Properties' dialog box for the 'My Top Open Opportunities' report. The 'General' tab is selected. The 'Name' field contains 'My Top Open Opportunities'. The 'Location' field is highlighted with a red box and shows the path: /shared/Sales/Embedded Content/Sales Representative/_portal.

General
Name: My Top Open Opportunities
Description: What are my top open opportunities?
Type: Dashboard
Location: /shared/Sales/Embedded Content/Sales Representative/_portal
Access:
Created: 6/17/14 9:39 AM
Modified: 10/27/15 8:16 AM
Accessed: 4/29/16 9:16 AM
Attributes:
Content State: Factory Content
<input type="checkbox"/> Hidden <input type="checkbox"/> System <input type="checkbox"/> Read Only <input type="checkbox"/> Do Not Index
Custom Properties:
Build: 11.1.1.7.10 (Build BIFNDNN_11.1.1.7.0BI-FAREL10-140 516.1252 BI-FAREL8-BP 64-bit)
Caption: kcap1400547705731_95
compositeSignature: dashboardfolder1
LocalizedDesc: kcap1409187659983_2

Name: **My Top Open Opportunities**

Location: /shared/Sales/Embedded Content/Sales Representative/_portal

- f. Click Cancel.
4. Add the infolet.
 - a. Close the Oracle Business Intelligence tab.

The screenshot shows the Oracle Business Intelligence Catalog interface. On the left, there's a sidebar with 'Folders' and 'Tasks'. Under 'Folders', 'Embedded Content' is expanded, showing sub-folders like 'Channel Account Manager', 'Channel Sales Manager', 'Partner Sales Representative', 'Sales Executive', 'Sales Manager', 'Sales Representative', and 'Dashboards'. The 'Dashboards' folder is also expanded, showing sub-items like 'Prompts' and 'Embedded Content.customized_20170517_091754'. On the right, a list of dashboards is displayed with their last modified date, owner, and a brief description. A red box highlights the 'Close tab (Ctrl+W)' button in the browser's address bar.

- b. In the Oracle Sales Cloud application, click **Home** to return to the simplified home page. Click on **Navigator**, and then click on **Sales Infolets** button.
- c. At the top of the page, expand the drop-down under Lisa.Jones and select **Customize Pages...**

The screenshot shows the Oracle Sales Cloud home page. It features a map of Seattle and surrounding areas with various markers. To the left, there are several performance metrics: 'My Performance' (\$1.40M Quota, \$700.00K Won, \$700.00K Gap), 'Leads' (4 critical, 9 total), 'Top Open Deals' (\$539.85K Deal Count), and 'Forecast' (\$1M Latest Adjusted). On the right, there's a section titled 'Customers Needing Attention' with a table showing customer names, elapsed time, and sales. A red box highlights the 'Customize Pages...' option in the 'Settings and Actions' dropdown menu.

- d. Set Edit Job Role = **Sales Representative**.
- e. Click **OK**.

Customize Pages

Select the layer you want to edit. Specify a value for the edit layer and any higher layer that is relevant to your target users. Customizations from the included higher layers are inherited when you customize.

Edit	Layer	Value	Include
<input type="radio"/>	Site		<input checked="" type="checkbox"/>
<input type="radio"/>	External Or Internal	Internal	<input checked="" type="checkbox"/>
<input checked="" type="radio"/>	Job Role	Sales Representative	<input checked="" type="checkbox"/>

OK **Cancel**

f. Many icons will appear on the objects in the Dashboard.

The screenshot shows a dashboard titled "vision" with several infolets:

- Top Open Deals:** Open \$539.85K, Deal Count 2.
- Leads:** ▲ 4, ▲ 9.
- My Next 10 Activity:** A list of tasks with icons:
 - To do: Send Quo document
 - Weekly Updates on competitive
 - To do: Address Customer concerns
 - Follow up with Optics
 - To do: Complete Influence Map
 - Weekly Forecast Review with Manager
 - Weekend Status Updates
 - To do: Send latest information
- Stalled Deals:** Open \$3.28M, Count 8.
- Weather Feed:** Zip Code: [empty]
- Activities:** # of Tasks 7, # of Appointments 9.
- My Performance:** \$1.40M, Quota \$700.00K, Won \$700.00K, Gap [empty].
- My Pipeline:** A bar chart showing Amount (\$239,850, \$300,000, \$728,250, \$380,000, \$300,000) across Sales Stages.
- # Open Critical SRs:** Critical SRs ▲ 3.
- Tweets by @Oracle:** A feed with one item from Oracle (@Oracle) about the Autonomous future.

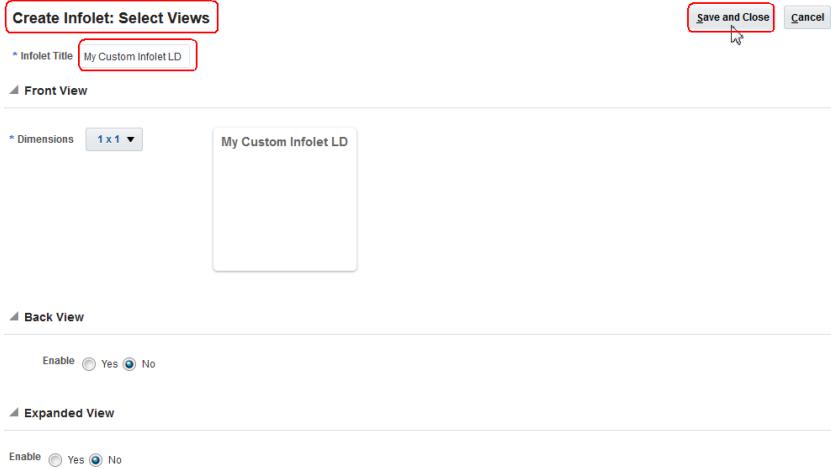
g. Click on Infolet Repository and then click on My Next 10 Activities, Twitter Feed

The sidebar lists the following infolets:

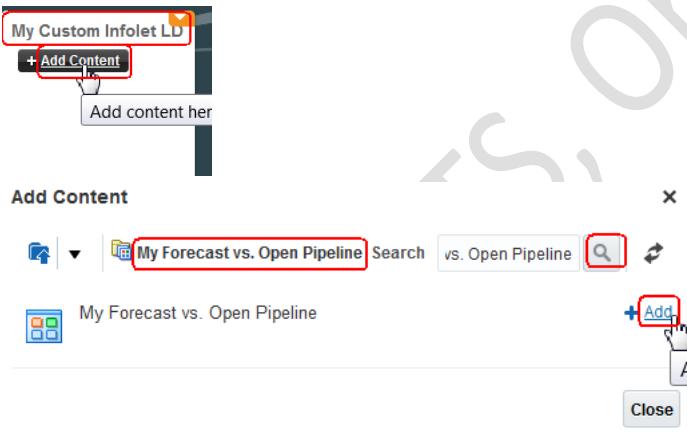
- # Open Critical SRs
- Activities
- Customers Needing Attention
- Forecast
- Leads
- My Next 10 Activities** (highlighted with a red box)
- My Performance
- My Pipeline
- Stalled Deals
- Top Open Deals
- Trip Planning
- Twitter Feed** (highlighted with a red box)
- Twitter-Live
- Weather Feed
- Create Infolet

The dashboard page is configured to optimally display **only 6/7 infolets**. This is intentional, as this should be a "quick overview" page that allows a user to quickly scan information of importance to him or her. If your requirements require additional analytics content, consider adding that content to the Analytics page rather than the infolet page.

- i. Click the **Infolet Repository > Create Infolet** .
- ii. Add **Infolet Title My Custom Infolet nn** (where nn is your student initials)



- j. In the Add Content dialog, in the Infolet row, click Add.



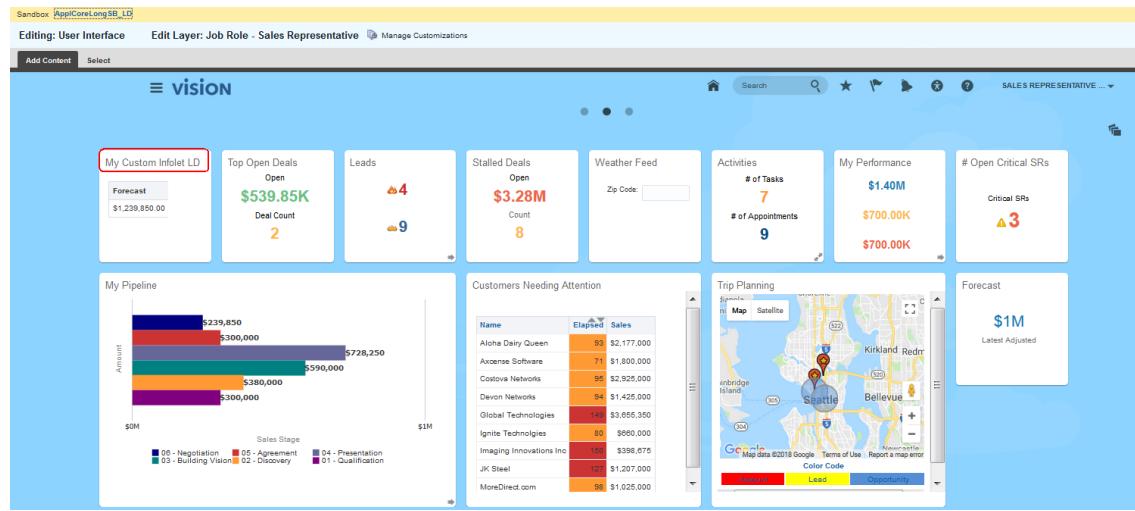
This adds **My Forecast vs. Open Pipeline** analysis infolet.

- k. Click Close.
- l. Notice that the infolet was placed in the bottom row.



You will adjust this after you finish configuring it.

- m. On the new infolet, just drag&drop to the top left.



- r. In the upper right of the page, click Close to save your changes.
5. Test the results.
 - a. If necessary, click the Home icon to navigate away from the dashboard.
 - b. Click Dashboard.
 - c. Verify that "My Custom Infolet nn" appears in the top left.
 - d. Click **My Custom Infolet nn**.
 - e. Verify that **My Forecast vs. Open Pipeline** is shown.
 6. Remain signed in to the application for the next practice.

4.4 Embedding Analytics

Goals

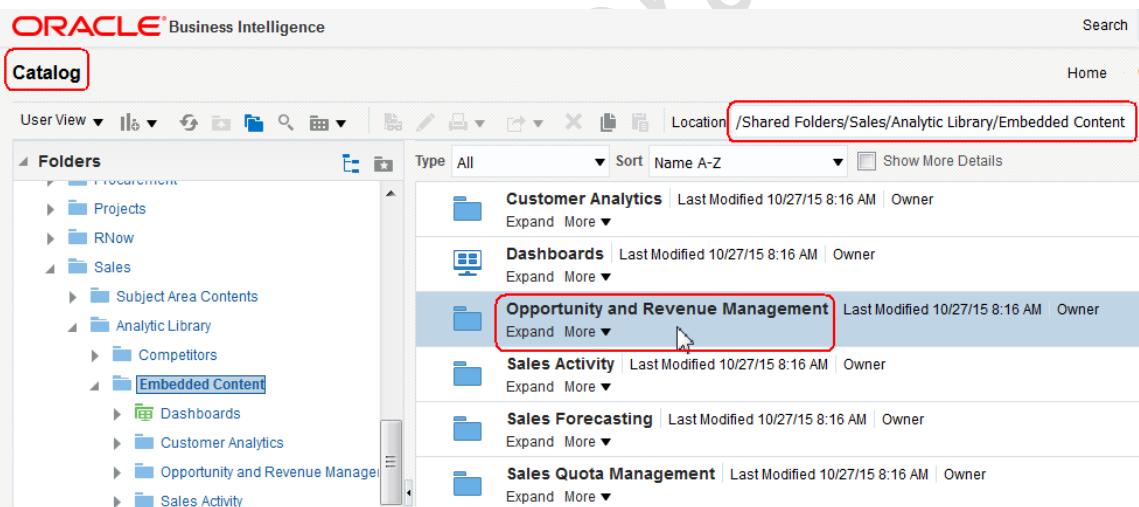
- Add a new report to the analytics page

Overview

In this practice, you will review an existing report, adjust its display options, and save it as a custom report. You will then add the report as a favorite on the analytics page.

Tasks

1. Examine and modify the report you will be using for this practice.
 - a. Navigate to **Reports and Analytics**.
 - b. In the regional area, click the Browse Catalog  icon. This opens a new Oracle Business Intelligence tab.
 - c. In the regional area, expand **Shared Folders**.
 - d. Expand **Sales > Analytic Library > Embedded Content**.
 - e. Select **Opportunity and Revenue Management**.



The screenshot shows the Oracle Business Intelligence Catalog interface. The top navigation bar includes 'Search', 'Home', and 'Catalog'. The left sidebar shows a tree view of 'Folders' under 'Procurement' (Projects, RNow), 'Sales' (Subject Area Contents, Analytic Library, Competitors, Embedded Content), and 'Embedded Content' (Dashboards, Customer Analytics, Opportunity and Revenue Management, Sales Activity). The main content area displays a list of items with columns for Type, Last Modified, and Owner. The 'Opportunity and Revenue Management' item is selected and highlighted with a red box. The URL in the browser's address bar is '/Shared Folders/Sales/Analytic Library/Embedded Content'.

Type	Last Modified	Owner
Customer Analytics	10/27/15 8:16 AM	Owner
Dashboards	10/27/15 8:16 AM	Owner
Opportunity and Revenue Management	10/27/15 8:16 AM	Owner
Sales Activity	10/27/15 8:16 AM	Owner
Sales Forecasting	10/27/15 8:16 AM	Owner
Sales Quota Management	10/27/15 8:16 AM	Owner

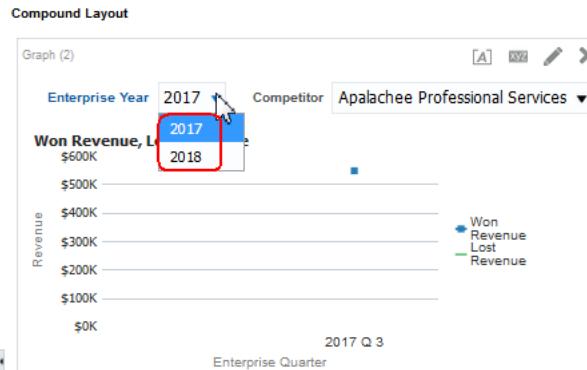
- f. Notice the large number of available opportunity and revenue reports.
- g. In the local area, locate the **Win-Loss Trends** report. You may need to scroll down.
- h. Examine the existing report.
 - 1) Under **Win-Loss Trends**, click **Open**.
You may receive no data in the initial report; this is not an issue.

Type All Sort Name A-Z Show More Details

- Opportunity List Report** | Last Modified 3/20/2018 1:26:37 PM | Owner
Drill down from Pipeline report. Provides opportunity line level details from the context of the parent report. Sorted in descending order by Revenue Amount.
Open Edit More ▾
- Opportunity List Report for Current Quarter** | Last Modified 3/20/2018 1:26:37 PM | Owner
Drill down report from Current Revenue at Stake, Customer Watch. Provides opportunity line level details from the context of the parent report. Sorted in descending order ord
Open Edit More ▾
- Opportunity Watch Real Time** | Last Modified 3/20/2018 1:26:37 PM | Owner
Shows all open opportunities in the current quarter along with sales account, and days to close. Sorted in descending order by value.
Open Edit More ▾
- Past Period Performance** | Last Modified 3/20/2018 1:26:37 PM | Owner
Shows quota attained by the logged-in user in the past year.
Open Edit More ▾
- Pipeline Report** | Last Modified 3/20/2018 1:26:37 PM | Owner
Open Edit More ▾
- Stalled Opportunities** | Last Modified 3/20/2018 1:26:37 PM | Owner
Shows open opportunities that are stalled. Stalled is defined as those opportunities open for a time period longer than the average duration of the sales stage. Sorted in
Open Edit More ▾
- Team At A Glance Real Time** | Last Modified 3/20/2018 1:26:37 PM | Owner
Shows a listing of direct reports of the logged in user along with select metrics. Available only to managers.
Open Edit More ▾
- Win-Loss Reasons** | Last Modified 3/20/2018 1:26:37 PM | Owner
Aggregates sum of lost or won revenue lines by reason for a particular quarter in past or current year.
Open Edit More ▾
- Win-Loss Trends** | Last Modified 3/20/2018 1:26:37 PM | Owner
Displays won and lost revenue by quarter for current or past year.
Open **Edit** More ▾

2) Notice that you can select the Enterprise Year for the report.

Notice you have just 2017/2017 years available in selection



3) You need to go to Criteria tab and add Set Enterprise Year = 2016.

Win-Loss Trends

Criteria Results Prompts Advanced

Subject Areas

- Sales - CRM Pipeline
 - Asset
 - Business Unit
 - Competitor
 - Contact
 - Currency
 - Customer
 - Customer Contact Profile
 - Employee
 - Facts
 - Historical Sales Stage
 - Industry
 - Lead
 - Marketing Source
 - Opportunity

Selected Columns

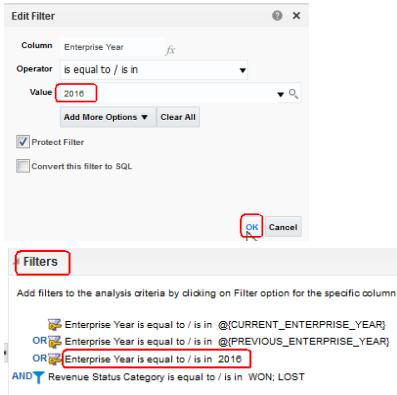
Time

Enterprise Year Enterprise Quarter Competitor Competitor Row ID Won Revenue Lost Revenue

Filters

Enterprise Year is equal to / is in @CURRENT_ENTERPRISE_YEAR OR Enterprise Year is equal to / is in @PREVIOUS_ENTERPRISE_YEAR AND Revenue Status Category is equal to / is in WON; LOST

Copy Filter



4) Notice that you can select a competitor against whom to review win-loss trends.

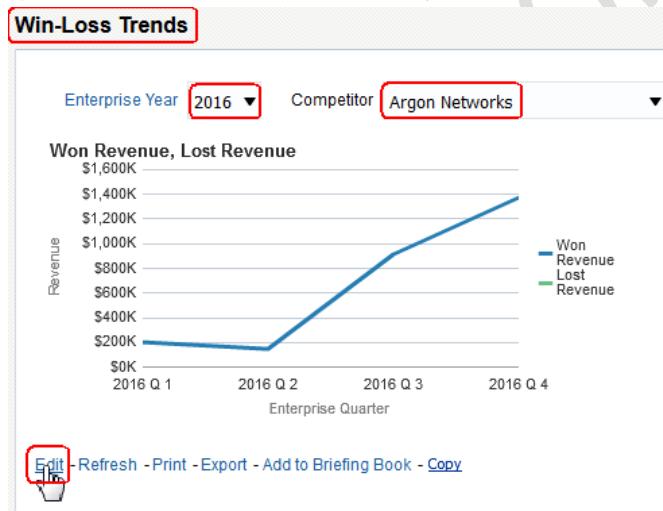
5) If necessary, set Competitor = **Argon Networks**.

6) Notice that your graph now contains data;

This could be an indicator of a very successful marketing strategy, a competitive new feature, or enhanced competitive sales training. An executive reviewing this graph might want to investigate further to determine what caused the upswing, and whether it might be successful against other competitors.

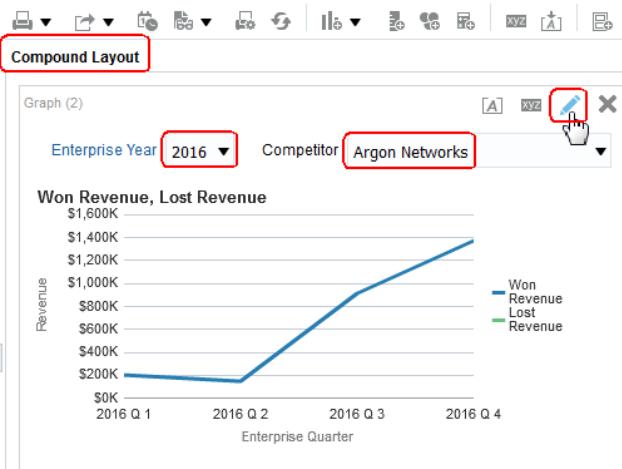
i. Make a visible modification to the report.

1) In the lower left below the report, click Edit.



2) Once again, set Enterprise Year = **2016** and Competitor = **Argon Networks**.

3) Notice that the report is a compound layout; the top section takes user parameters (year and competitor) and the bottom section displays the graph.

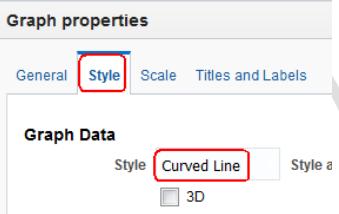


- 4) In the upper right of the report, click the View Properties icon.
- 5) Verify that the **General** tab is selected.
- 6) Set Canvas Width = 885.
- 7) Set Canvas Height = 420.

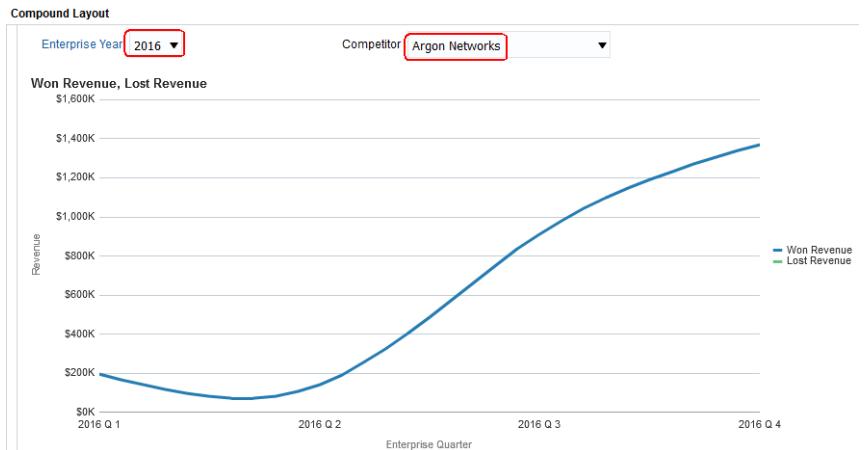
These settings will provide a much larger graph.



- 8) Click the Style tab.
- 9) Set Style = **Curved Line**.

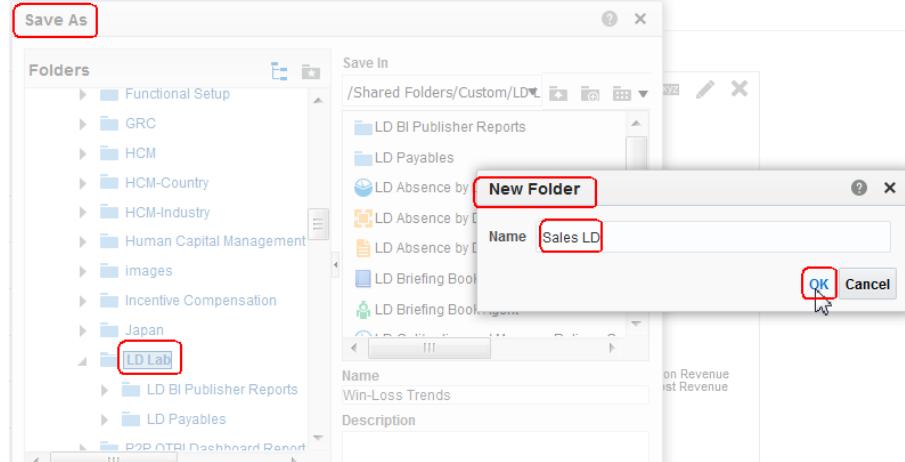


- 10) Click **OK**.
- 11) Notice that the graph is much larger, and is now curved.

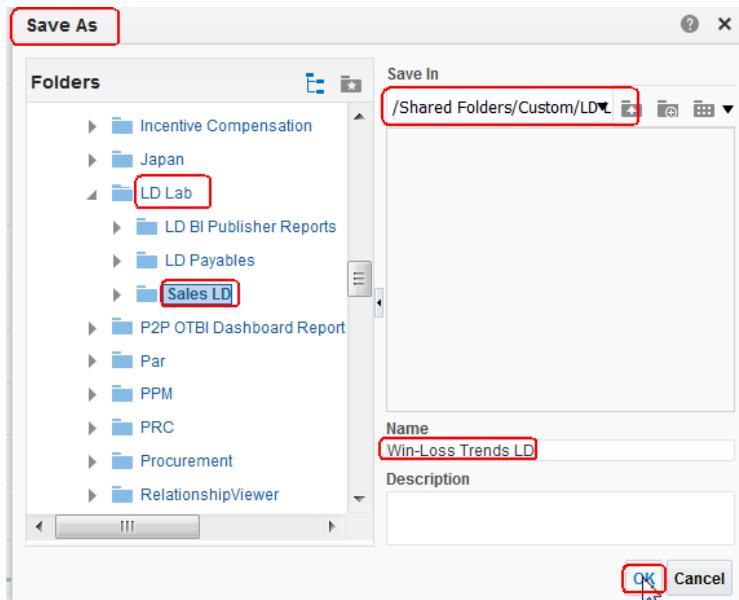


j. **Save the custom report.**

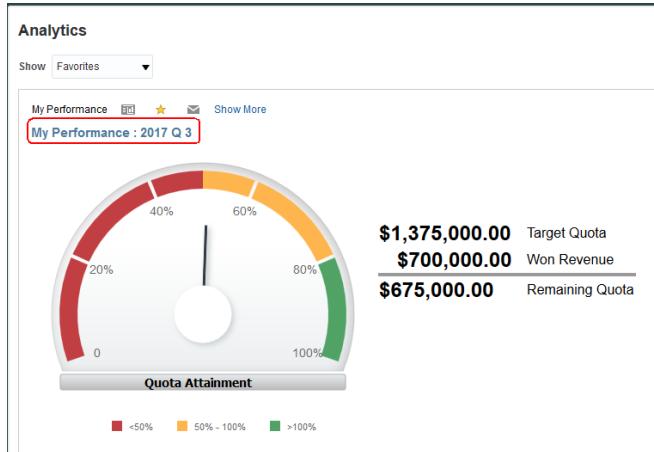
- 1) In the upper right, click the **Save As**  icon.
Be very careful to select Save As rather than Save.
- 2) In the left pane, navigate to **Shared Folders > Custom > LD Lab**.
- 3) Create a new folder named **Sales nn**, where *nn* is your student initials.



- 4) Set Name = **Win-Loss Trends nn**, where *nn* is your student initials.
- 5) Set Description = Modified Win-Loss Trends report.
- 6) Click OK.



- 7) Verify that there are no error messages; that is, that your report saves successfully.
- k. Close the Oracle Business Intelligence browser tab.
2. Examine how the default analytics page displays reports.
- Return to the Oracle Sales Cloud application.
 - Click the **Home** icon to return to the simplified home page.
 - Click **Navigate** and then click **Analytics** icon under **Sales**.
- VISION**
- Navigator**
- Marketing**
- Response Processing**
- Sales**
- Activities**
 - Leads**
 - Opportunities**
 - Forecasts**
 - Accounts**
 - Contacts**
 - Sales Campaigns**
 - Lightbox**
 - Analytics**
- d. Notice that favorites listed.



- e. Add some reports as favorites.

- 1) In the upper right, click the List View icon.
- 2) Click the Search icon .
- 3) Enter **Win-Loss** and click the smaller Search icon . Once again, the first time you perform a search it may take some time as the data is cached.
- 4) Notice that several reports are returned, including your report and at least two others.
- 5) Click the Favorite icon next to:
 - Win-Loss Reasons
 - Win-Loss Trends
 - **Win-Loss Trends nn**, where *nn* is your student number (notice the yellow star color)

- 6) Click the Search icon to close the search pane.
- 7) Set Show = **Recent View** and then **Favorites**.
- 8) Verify the three reports you marked as favorites are shown.
- 9) Click **Win-Loss Trends nn**, where *nn* is your student number.

10) Notice that your custom report is shown.

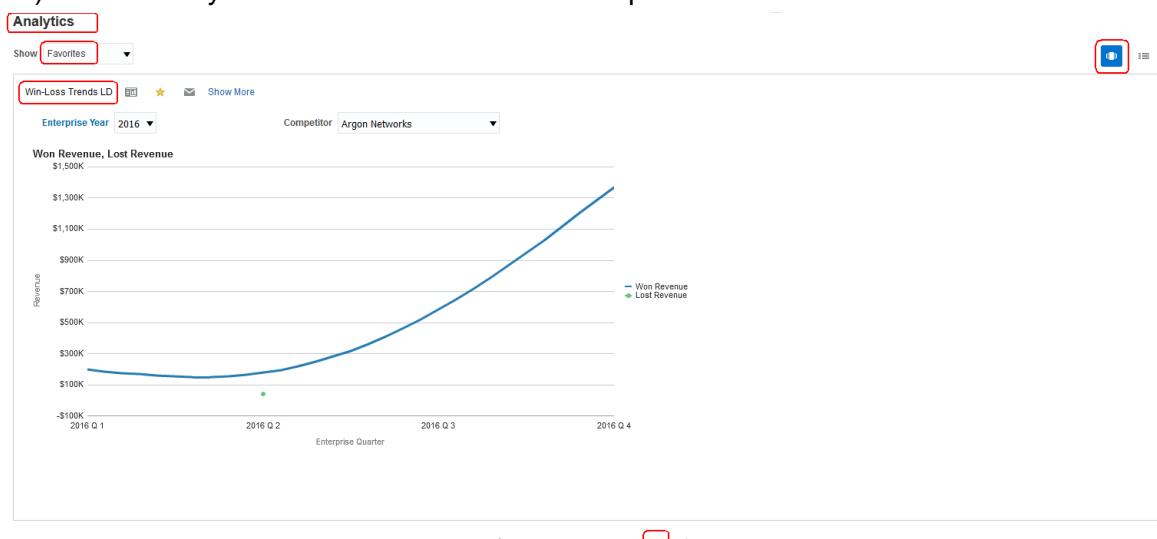
The screenshot shows the 'Analytics' section with the 'Favorites' tab selected. A red box highlights the 'Win-Loss Trends LD' report, which is described as 'Displays won and lost revenue by quarter for current or past year.' At the top right, there is a search icon and a 'List View' button.

11) Click Done.

12) Click the Report View icon

13) At the bottom of the page, click the last dot

14) Notice that your custom Win-Loss Trends report is shown.



This shows how individual users can set up their own analytics pages: They search for reports, mark them as favorites, and can review them in the Favorites view. However, each user must make these changes individually; you cannot mark a global "favorite".

4.5 Creating a Custom Analysis

Goals

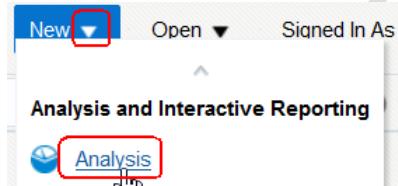
- Create a new custom analysis
- Add the custom analysis to the main simplified opportunity page

Overview

In this practice, you will first create a report that displays the number of opportunities for customers in a given state. You will make the report sort rows by the number of opportunities and color-code them by value. Finally, you will allow users to select the state for which the report is generated. Once you have completed your report, you will add it to the simplified opportunity home page.

Tasks

1. Navigate to Oracle Business Intelligence.
 - a. Navigate to **Tools > Reports and Analytics**.
 - b. In the regional area, click the Browse Catalog icon . A new browser tab displaying Oracle Business Intelligence opens.
2. Create a new analysis.
An analysis allows you to select a subject area and columns from that subject area in order to build reports.
 - a. Above the regional area, click the **New** drop-down and select **Analysis**.



- b. In the Select Subject Area drop-down, select "**Sales - CRM Opportunities and Products Real Time**". You may need to scroll down to locate this entry.



A **subject area** is a related set of facts and dimensions that can be used to create reports or analyses. Notice that Oracle Sales Cloud provides a large set of subject areas.

3. Select the columns for your analysis.
 - a. If necessary, in the regional area expand the "**Sales - CRM Opportunities and Products Real Time**" subject area to display its folders.
 - b. Expand **Customer** to display the available customer fields.
 - c. Under Customer, double-click **Name** to add it to the "Selected Columns" area of the right pane. You may need to scroll down to locate **Name**.

- d. Double-click **City**, then **State**, and **Number of Employees** to add them to the right pane.

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis formula and filters, apply sorting, or delete by clicking or hovering over the button

Customer

Name City State Number of Employees

- e. In the regional area, collapse **Customer**.
f. Expand **Facts > Pipeline Facts** to display the available fields.
g. Double-Click **# of Opportunities**.

Criteria Results Prompts Advanced

Subject Areas

- ▲ **Facts**
 - ▶ Pipeline Detail Facts
 - ▶ **Pipeline Facts**
 - # Days in Stage
 - # of Closed Opportunities
 - # of Competitive Opportunities
 - # of Competitive Won/Lost Opp
 - # of Customers
 - # of Days to Close
 - # of Lost Competitive Opport
 - # of Lost Opportunities
 - # of New Opportunities
 - # of Open Opportunities
 - # of Opportunities**

- h. At the top left, click the **Results** tab to preview your report in its current state.

Compound Layout

Title	[A]		
Table	[A]	xyz	
<hr/>			
Name	City	State	Number of Employees # of Opportunities
A. C. Networks	Helena	MT	483 8
Aloha Dairy Queen	BEAVERTON	OR	40 7
Applied Micro Circuits Corp	Seattle	WA	63,609 4
Axcense Software	SEATTLE	WA	27 8
Bada Restaurants Inc	SEATTLE	WA	22 3
Costova Networks	Anchorage	AK	496 11
Devon Networks	Bellevue	WA	312 7
Gateway Companies, Inc	Reno	NV	22,467 11

- i. Notice that the report is already in a compound layout, with a **Title** pane above a **Table** pane. This is the default report format when you initially set columns and run a report.
- j. Notice that the report lists customers in alphabetical order, including their cities, states, numbers of employees, and numbers of opportunities.
This is the data you want displayed; you merely want to filter, sort, and highlight it.

4. (Optional) Examine additional reporting options.

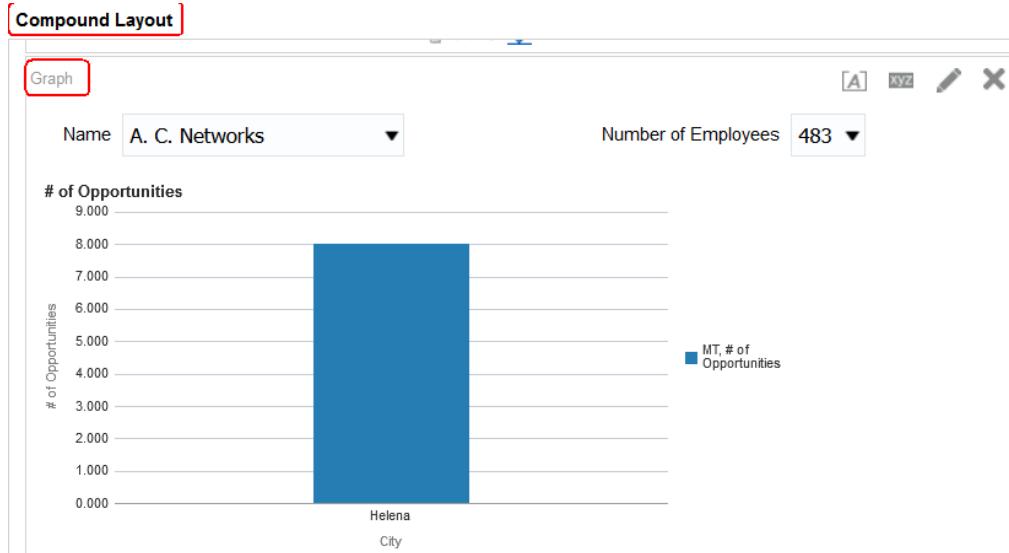
For this practice you will be generating a tabular report. This step shows you how to add other options.

- a. At the bottom of the regional area, under **Views**, expand the **New View** drop-down



This lists the available methods for viewing the data.

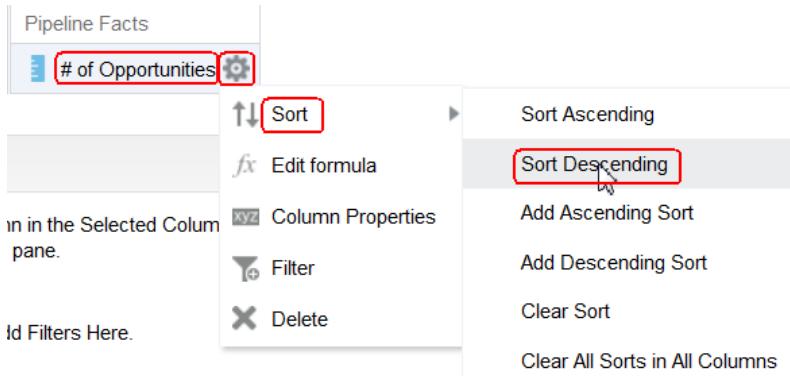
- b. Select **Graph > Bar > Vertical**.



- c. Notice that since you did not adjust any parameters, the bar graph shows the number of opportunities for a single customer.
- This is not a particularly useful graph. For more information on generating custom analytics, consider taking an Oracle University course on Oracle Business Intelligence.
- d. In the bottom of the regional area, under **Views**, select **Graph**.
 - e. Click the **Delete** icon. You will not keep this graph.



5. Set the sort order.
 - a. At the top left, click the **Criteria** tab.
 - b. In the local area, to the right of '**# of Opportunities**' metric, mouse over the Options menu to expose the drop-down.
 - c. Select **Sort > Sort Descending**.

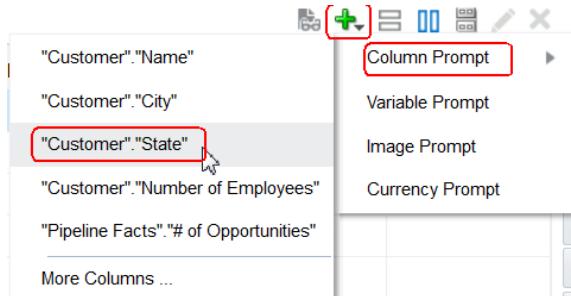


This makes the report sort on number of opportunities rather than customer name.

6. Add a **user prompt** to prompt for the user for a value for State.

- a. At the top left, click the Prompts tab

- b. Click the New icon to expand the drop-down.
 c. Select **Column Prompt > "Customer"."State"**.



- d. Click **OK** to accept the default label.

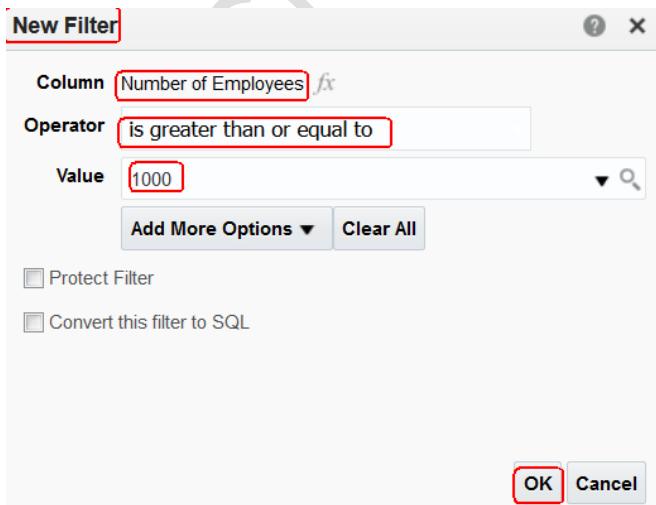
7. Add a filter to limit the results.

- At the top left, click the **Criteria** tab.
- In the local area, in the Filters section, click the "Create a filter for the current Subject Area" icon to expand the drop-down.
- Select **"Number of Employees."**
- In the New Filter pop-up, set:

Operator	is greater than or equal to
Value	1000

This ensures that the report only shows "large" customers; that is, those with at least 1000

employees. e. Click **OK**.

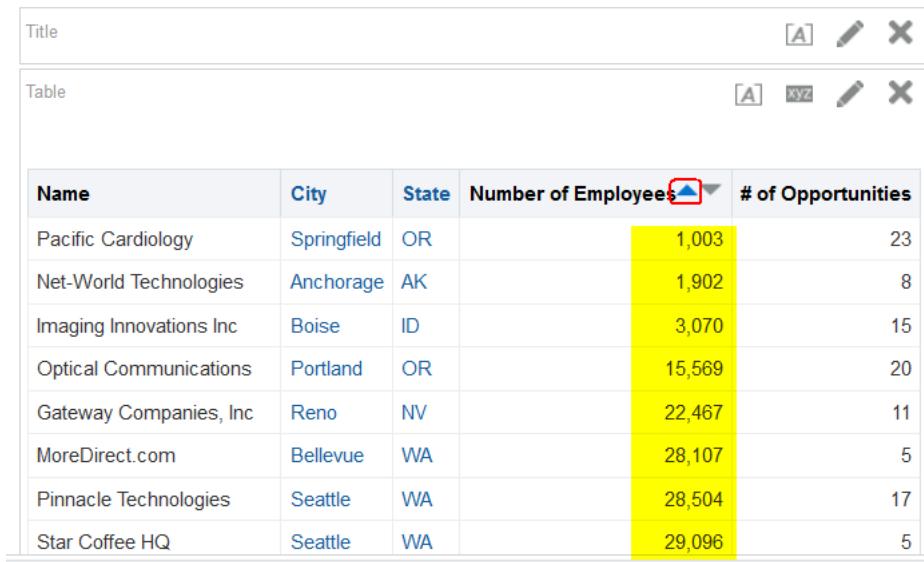


8. Verify the results:

- At the top left, click the **Results** tab.
- Verify that the report is listed in descending order by number of opportunities.
- Verify that you do not see any customers with fewer than 1000 employees.

- d. To be sure, sort the report in ascending order by **Number of Employees**. The first row should show no fewer than 1000 employees.

Compound Layout

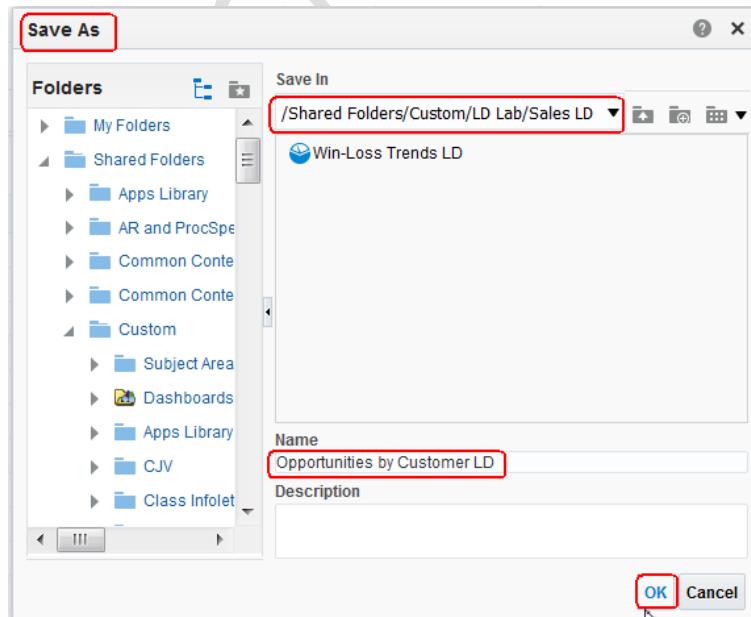


Name	City	State	Number of Employees	# of Opportunities
Pacific Cardiology	Springfield	OR	1,003	23
Net-World Technologies	Anchorage	AK	1,902	8
Imaging Innovations Inc	Boise	ID	3,070	15
Optical Communications	Portland	OR	15,569	20
Gateway Companies, Inc	Reno	NV	22,467	11
MoreDirect.com	Bellevue	WA	28,107	5
Pinnacle Technologies	Seattle	WA	28,504	17
Star Coffee HQ	Seattle	WA	29,096	5

9. Save your changes.

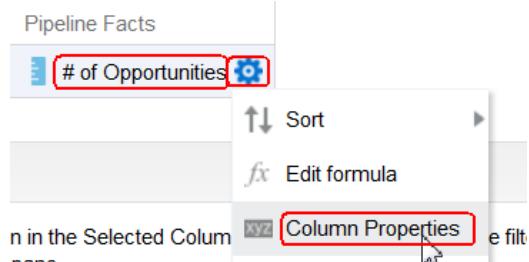
- In the upper right, click the **Save Analysis** icon .
- In the **Save As** dialog, in the Folders pane on the left, expand Shared Folders.
- Expand **Shared Folders > Custom > XX Lab > Sales XX**.
- Select **Sales nn**, where *nn* is your student initials.

Note: You created this folder in a previous activity. If you did not, create it now.

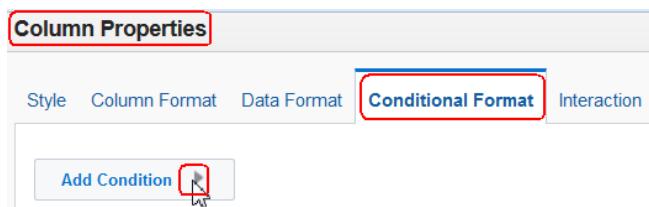


- Set Name = **Opportunities by Customer nn**, where *nn* is your student initials.

- f. Click **OK**.
 - g. Verify that no error messages are displayed; that is, the report saves successfully.
10. Add conditional formatting using highlights to your report.
- a. At the top left, click the **Criteria** tab.
 - b. In the local area, to the right of '# of Opportunities' metric, mouse over the Options menu to expose the drop-down.
 - c. Select **Column Properties**.

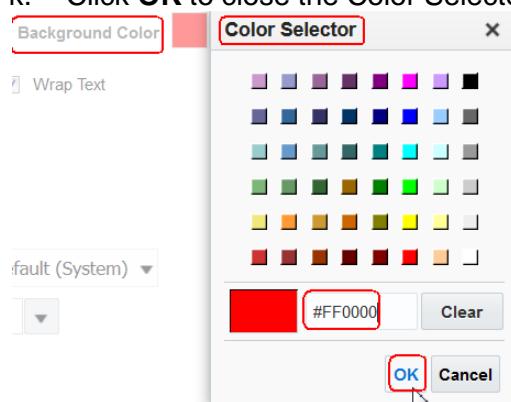


- d. In the **Column Properties** pop-up, click the **Conditional Format** tab.
- e. Click the **Add Condition** button.



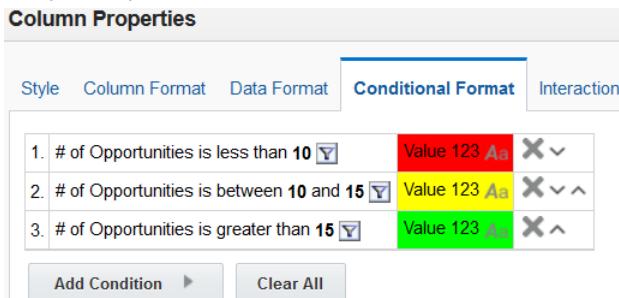
- f. In the drop-down, select **# of Opportunities**.
- g. Set

Operator	is less than
Value	10
- h. Click **OK**.
- i. In the **Edit Format** dialog, expand the **Background Color** drop-down.
- j. Select the color red (#FF0000).
- k. Click **OK** to close the Color Selector.



- l. Click **OK** to close the Edit Format dialog.

- m. Verify your results:
- n. Repeat these steps to add two more conditions:
 - For **# of Opportunities** between 10 and 15, set a yellow background color (#FFFF00).
 - For **# of Opportunities** greater than 15, set a green background color (#00FF00).
- o. Verify that you see three conditions in the conditional format section.



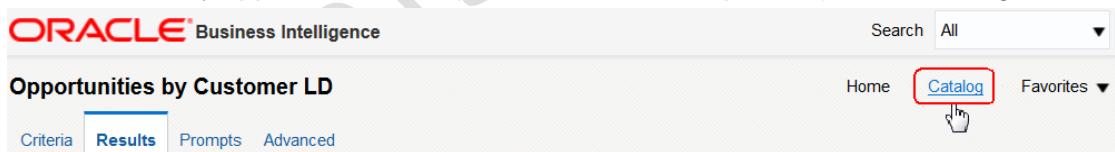
- p. Click **OK** to close the conditional format screen.

11. Verify the results:

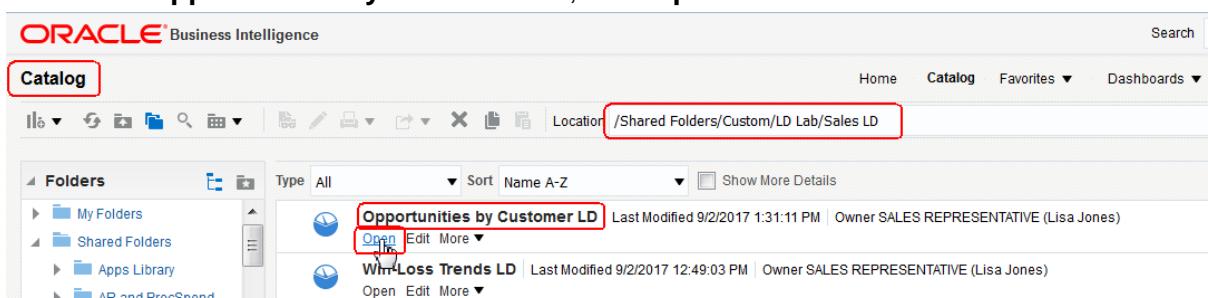
- a. At the top left, click the **Results** tab.
- b. In the **# of Opportunities** column, sort descending.
- c. Scroll through to verify the color coding.
- d. In the upper right, click the **Save Analysis** icon to save your changes.

12. Test the report in Oracle Business Intelligence.

- a. In the secondary application menu (the one below the top menu), click Catalog.



- b. If necessary, in the regional area, navigate to **Shared Folders > Custom > LD Lab > Sale nn**, where nn is your student initials.
- c. Verify that the **Opportunities by Customer nn** report appears in the local area on the right.
- d. Under **Opportunities by Customer nn**, click **Open**.



- e. Verify that you are prompted to select one or more states before the report is rendered.
- f. Expand the State list and select several states such as Alaska, Arizona, and Arkansas.

Opportunities by Customer LD

State

- NULL
- México
- AK
- AR
- AZ
- Alabama

Search...

g. Click OK.

h. Verify that your report appears.

Opportunities by Customer LD

Opportunities by Customer LD

Name	City	State	Number of Employees	# of Opportunities
Pacific Cardiology	Springfield	OR	1,003	23
Global Technologies	Portland	OR	72,968	20
Optical Communications	Portland	OR	15,569	20
Pinnacle Technologies	Seattle	WA	28,504	17
Imaging Innovations Inc	Boise	ID	3,070	15
Pacific Utility Network	Portland	OR	30,392	15
Gateway Companies, Inc	Reno	NV	22,467	11
Stryker Corporation	AMITY	OR	61,692	9
Net-World Technologies	Anchorage	AK	1,902	8
USC Computer Services	Amity	OR	36,097	8
System Solutions	Portland	OR	102,417	7
Network Xpress Corp	Las Vegas	NV	47,494	6
MoreDirect.com	Bellevue	WA	28,107	5
Star Coffee HQ	Seattle	WA	29,096	5
Applied Micro Circuits Corp	Seattle	WA	63,609	4

i. Notice that you cannot go back and select a different state; you must re-run the report by clicking Catalog to return to the previous page.

13. Remain signed in to the application for the next practice.

4.6 Exploring Historical Trending

Goals

- Review the profile options for historical trending reports
- Review the processes required to generate historical data
- Create a historical trending report

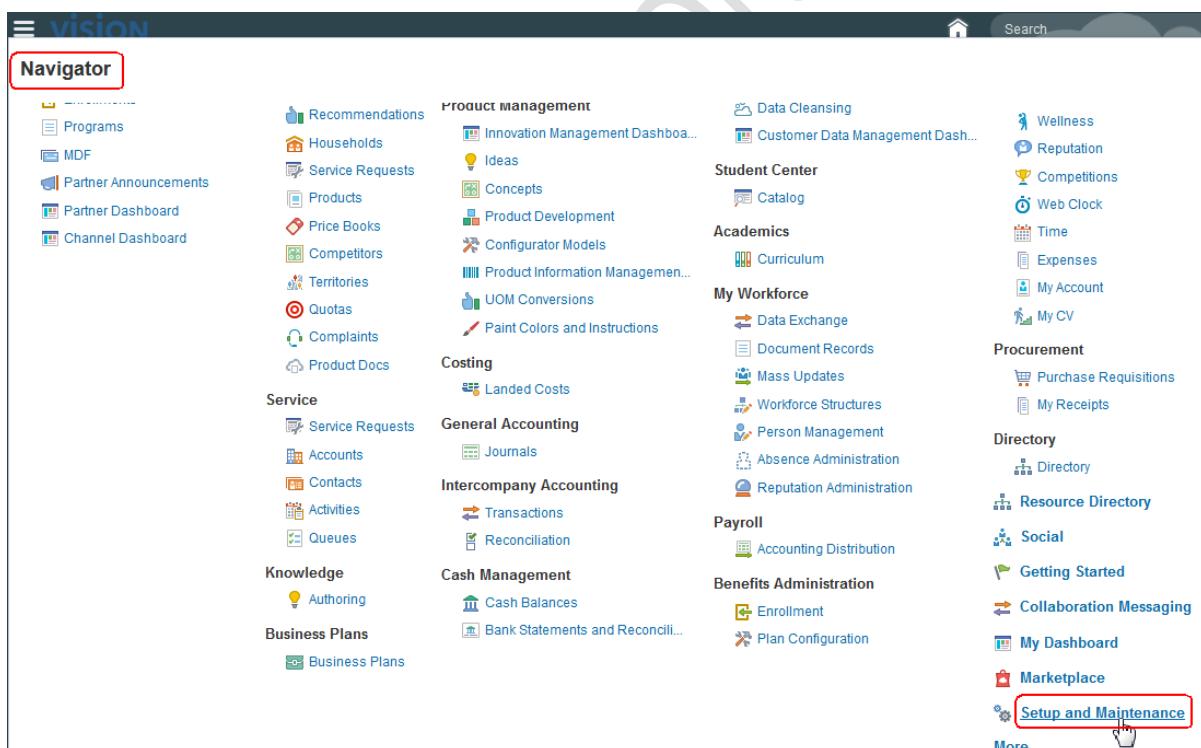
Overview

In this practice, you will first verify that historical trending reports are enabled on your system by verifying the appropriate profile options and processes. You will then create a historical trending report.

Sign in as Bala Gupta, user name **bala.gupta**

Tasks

1. Review the profile options associated with historical trending reports.
 - a. Navigate to **Setup and Maintenance**.



- b. **Setup = Sales Set Name = Manage Opportunity Profile Options.** c. Click **Search**

The screenshot shows the Oracle Sales setup interface. In the left sidebar, under 'Functional Areas', 'Opportunities' is selected. In the main pane, the 'Opportunities' section is displayed with various tasks. A red box highlights the 'Manage Opportunity Profile Options' link in the search results.

- d. Next to "Manage Opportunity Profile Options", click the Go to Task icon .
- e. In the Manage Opportunity Profile Options page, set **Profile Display Name = Sales Historical Snapshot Configuration**.
- f. Click **Search**.

The screenshot shows the 'Manage Opportunity Profile Options' search page. The 'Profile Option' search term and the 'Profile Display Name' field containing 'Sales Historical Snapshot Configuration' are highlighted with red boxes. The 'Search' button is also highlighted.

- g. Verify that a single profile with Profile Option Code = **MOO_MANAGE_SALES_HISTORICAL_SNAPSHOT_CONFIGURATION** is shown.
- h. In the Profile Values section, verify:
 - Profile Level = Site
 - Profile Value = C=120,D=120,W=58,M=14,Q=5

The screenshot shows the 'Search Results : Profile Options' page. It displays a single profile row with the following details:

Profile Option Code	Profile Display Name	Application	Module	Start Date	End Date	Description
MOO_MANAGE_SALES_HISTORICAL_SNAPSHOT_CONFIGURATION	Sales Historical Snapshot Config...	Opportunity Management	Opportunities	1/1/51		Capture snapshots for opportunities closed in past C days, and retain these snapshots: Daily for D days, ...

 The 'Profile Value' column shows 'C=120,D=120,W=58,M=14,Q=5'. The 'Search' button is highlighted.

The profile value here specifies the retention policy. This profile option allows a sales administrator to tune how long the system should retain daily, weekly, monthly and quarterly snapshots. The codes are:

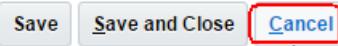
- **C**: Closed period (in days). Tells the system to create snapshots for opportunities closed within the last C days. This value must be greater than zero.
- **D**: Daily snapshots (in days): The number of days to retain daily snapshots. This value must be greater than zero.
- **W**: Weekly snapshots (in weeks): The number of weeks to retain weekly snapshots. This only applies if the enterprise calendar is a week-based calendar.
- **M**: Monthly snapshots (in months): The number of months to retain monthly snapshots. This only applies if the enterprise calendar is a month-based calendar.

- **Q:** Quarterly snapshots (in quarters): The number of quarters to retain quarterly snapshots.

An upper limit of 10,000,000 snapshot records (opportunity and revenue records combined) is supported. Once the record limit is reached, the snapshot process will automatically purge records by oldest snapshot date until the record count is brought under the limit.

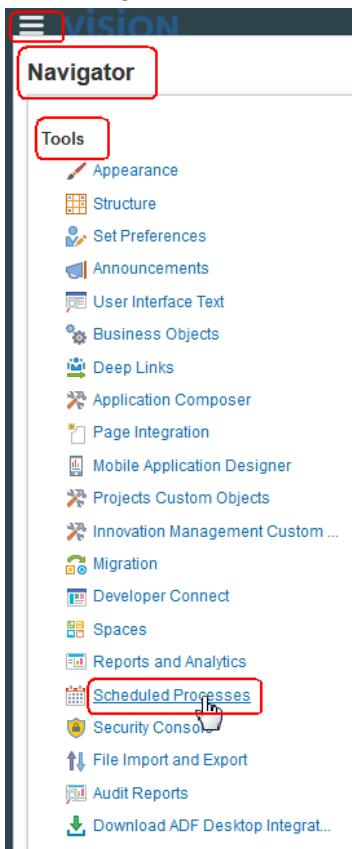
Note: The snapshot process only supports capturing snapshots if the enterprise calendar is configured to be either a month- or week-based calendar. No other calendar period frequencies are supported. It is a prerequisite to set up the enterprise calendar before using historical snapshots.

- i. Click **Cancel** to close the profile options page without altering any values.



2. Verify that the job that generates historical snapshot data has been run.

- a. Navigate to **Tools > Scheduled Processes**.



- b. Set Submission Time **Before <Today's date and time>**.

- c. Set Name = **Generates Sales Historical Snapshots**.

- d. Click **Search**.

Name	Submission Time	Status
Generates Sales Historical	Before 6/24/16 7:50 AM	

- f. Verify that at least one record is returned, indicating that historical snapshot data has

been generated.

- h. If the job has not been run:

IMPORTANT NOTE: Only one student should run this job. If multiple students submit the job as **Bala Gupta**, most of them will get an error that the job has already been submitted. This is not an issue. Wait for at least one job to complete successfully before proceeding.

- 1) Under Search Results, click **Schedule New Process**.
- 2) Verify that Type = **Job**.
- 3) Set Name = **Generates Sales Historical Snapshots**.

Search and Select: Name

Name: Historical Snapshots

Search Reset

Name	Description
Generates Sales Historical Snapshots	Takes a snap

OK Cancel

- 4) Click **OK**.

Scheduled Processes

Overview

Search

Name: Generates Sales Historical

Process ID:

Status:

Search Results

View: Flat List (selected) Hierarchy

Actions: View Schedule New Process Resubmit Put On Hold Cancel Process

Name: No data to display.

Search and Select: Name

Name: Generates Sales Historical

Search Reset

Name	Description
Generates Sales Historical Snapshots	Takes a snap

OK Cancel

- 5) Verify that **Schedule = As soon as possible**.
- 6) Click **Submit**.

Process Details

Process Options Advanced **Submit** Cancel ▾

Name	Generates Sales Historical Snapshots
Description	Takes a snapshot of the real time data for sale...
Schedule	As soon as possible
Notify me when this process ends	
Submission Notes	

- 7) In the **Confirmation** dialog box, click **OK**.
- 8) In the **Process Details** popup, click **Close**.
- 9) Refresh the process list until the process shows as Completed; this should take 2-3 minutes.

Search Results

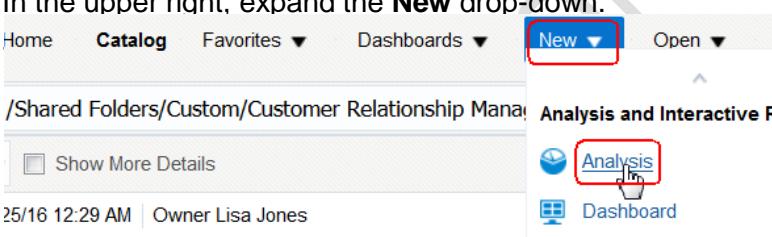
View (Flat List Hierarchy

Actions View Schedule New Process Resubmit Put On Hold Cancel Process Release Process View Log

Name	Process ID	Status	Scheduled Time	Submission Time
Generates Sales Historical Snapshots	1054978	Succeeded	6/25/16 7:56 AM UTC	6/25/16 7:56 AM UTC

- i. **Sign out as Bala Gupta.**
- j. **Log in as Lisa Jones**, user ID **lisa.jones**

3. Build a Historical Snapshot Report.

- a. Navigate to **Reports and Analytics**.
 - b. In the regional area, click the Browse Catalog icon .
 - c. In the upper right, expand the **New** drop-down.
 - d. 
 - Home Catalog Favorites ▾ Dashboards ▾ **New ▾** Open ▾
 - e. Drill down on the **Sales - CRM Historical Pipeline** subject area. You may need to scroll down.
- This subject area is specifically designed for reporting on opportunities and revenues against their daily, weekly or monthly (depending on the enterprise calendar period setup), quarterly and yearly trends or to compare opportunity and revenue data against specific points in time.

The other historical snapshot subject area is **Sales - CRM Opportunity Sales Stage Snapshot**, that includes

- Historical Opportunity Dimension - contains historical snapshot data on standard opportunity attributes
- Historical Opportunity Extension Dimension - contains historical snapshot data on custom opportunity attributes
- Historical Revenue Dimension - contains historical snapshot data on standard revenue attributes
- Historical Revenue Extension Dimension - contains historical snapshots data on custom revenue attributes
- Pipeline Snapshot Date Dimension - contains opportunity/revenue snapshot frequency. An attribute from this dimension is a must for reporting on data from any of the historical dimensions and facts
- Opportunity Dimension - contains real time opportunity data

- Opportunity Extension Dimension - contains real time opportunity custom data
- Revenue Dimension - contains real time revenue data
- Revenue Extension Dimension - contains real time revenue custom data
- Other dimensions - contains real time data
- Historical Pipeline Facts - Similar to pipeline facts in the Sales - CRM Pipeline Subject Area. Here, the measurements are calculated based on historical opportunity snapshot data (at opportunity granularity)
- Historical Pipeline Detail Facts - Similar to pipeline detail facts in the Sales - CRM Pipeline Subject Area. Here, the measurements calculated based on historical opportunity and revenue snapshot data (at revenue granularity)

Note: In case your environment has only below dimensions/facts, please skip this exercise

The screenshot shows the Oracle BI Publisher interface with the title bar 'Untitled'. Below it is a navigation bar with tabs: Criteria (which is selected), Results, Prompts, and Advanced. Under the 'Criteria' tab, there is a section titled 'Subject Areas' with a search icon and a dropdown menu. A list of subject areas is shown, with the first item, 'Sales - CRM Opportunity Sales Stage Snapshot', highlighted with a red box.

- Select the columns for your analysis:
 - In the regional area, expand **Opportunity**.
 - Double-click **Opportunity Name** to add it to the Selected Columns section. You may need to scroll down to locate **Opportunity Name**.
 - Add **Owner First Name**.
 - Add **Owner Last Name**.
 - Collapse **Opportunity**.
 - Expand **Customer**.
 - Add **Customer Name**.
 - Collapse **Customer**.
 - Expand **Industry**.
 - Add **Industry Name**.
 - Collapse **Industry**.
 - Expand **Product**.
 - Add **Product Name**.
 - Collapse **Product**.
 - Expand **Revenue**.
 - Add **Revenue ID**.
 - Collapse **Revenue**.
 - Expand **Pipeline Snapshot Date**.
 - Notice that you can choose a pipeline date, period (week or month), quarter, or

year.

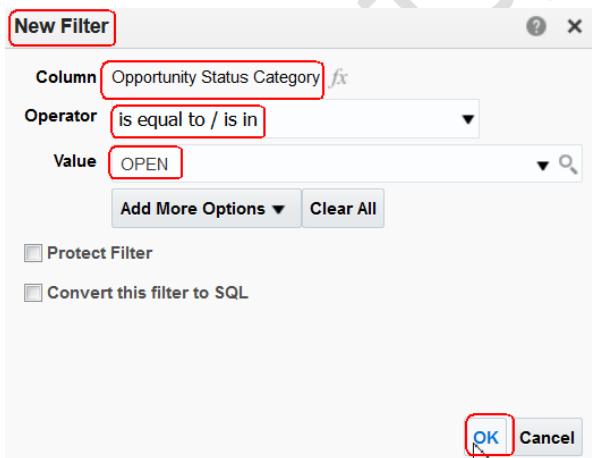
- 20) Add **Pipeline Snapshot Date**.
- 21) Collapse Pipeline Snapshot Date.
- 22) Expand **Facts > Historical Pipeline Detail Facts**.
- 23) Notice that you can add facts on revenue lines, open or closed opportunities, or both.
- 24) Add **Opportunity Line Revenue**.
- 25) Verify your columns:

Selected Columns

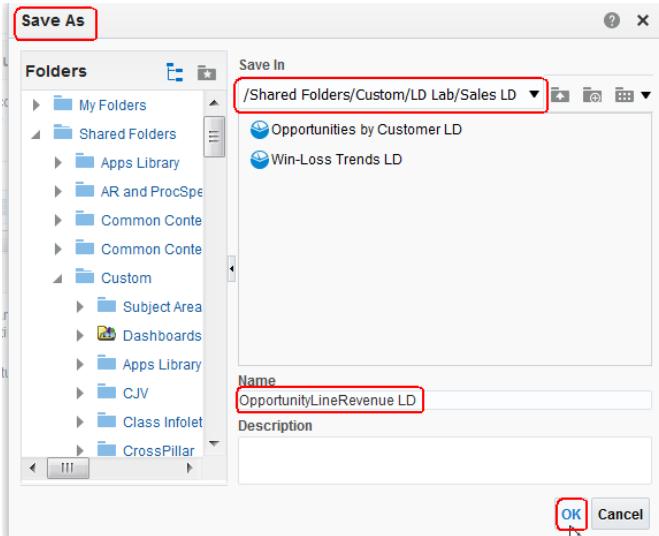
Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Opportunity	Customer	Industry	Product	Revenue	Pipeline Snapshot Date	Historical Pipeline Detail Facts		
Name	Owner First Name	Owner Last Name	Name	Industry Name	Product Name	Revenue ID	Pipeline Snapshot Date	Opportunity Line Revenue

- g. Filter to only include open opportunities.
 - 1) In the local area, under Filters, click "Create a filter for the current Subject Area"
 - 2) In the drop-down, click **More Columns**.
 - 3) In the pop-up, expand **Opportunity**.
 - 4) Select **Opportunity Status Category**.
 - 5) Click **OK**.
 - 6) Verify that Operator = "is equal to / is in".
 - 7) Select Value = **OPEN**.
 - 8) Click **OK** to close the New Filter dialog box.



- h. Save the report.
 - 1) In the upper-right corner, click the Save As icon
 - 2) In the Save As pop-up, expand **Shared Folders > Custom > LD Lab > Sales nn**, where *nn* is your student initials. You created this folder in an earlier practice. If it does not exist, create it now.
 - 3) Set Name = **OpportunityLineRevenue nn**, where *nn* is your student initials.
 - 4) Click **OK**.



4. Verify the results.

a. Click on Catalog



- b. In the regional area, expand Shared Folders > Custom > LD Lab > Sales nn, where nn is your student initials.
- c. Click OpportunityLineRevenue nn, where nn is your student number
- d. Click Open.
- f. Verify that the report lists opportunities, customers, and snapshot dates for historical data.

UntitledOpportunityLineRevenue LD									
Home Catalog Favorites ▾ Dashboards ▾ New ▾ Open ▾ Signed In As Lisa Jones ▾									
UntitledOpportunityLineRevenue LD									
Name	Owner First Name	Owner Last Name	Name	Industry Name	Product Name	Revenue ID	Pipeline Snapshot Date	Opportunity Line Revenue	
Big Data Analytics Deployment	Frank	Handy	Costova Networks	Communications	Full System Integration and Development	300000119080815	4/21/16	270,000	
							4/22/16	270,000	
							6/25/16	270,000	
Big Data Expansion Project	Lisa	Jones	Optical Communications	Communications	Sentinel Power Server 3000	300000113781837	1/31/16	550,000	
							3/1/16	550,000	
							3/2/16	550,000	
							3/4/16	550,000	
							3/5/16	550,000	
							3/6/16	550,000	
							4/21/16	550,000	
							4/22/16	550,000	
							6/25/16	550,000	
Cloud Based Development Project	Liz	Peters	Pacific Utility Network	Engineering & Construction	Sentinel Power Server 1000	300000113781757	1/31/16	980,000	
							3/1/16	980,000	
							3/2/16	980,000	

5. Test a more advanced report. (Optional)

Note that this report is very similar to the previous report, and you could edit the previous report instead of creating an entirely new one.

- a. If necessary, navigate to Reports and Analytics.
- b. Click the Browse Catalog icon.
- c. Select New > Analysis.

New ▾ Open ▾ Signed In As

Analysis and Interactive Reporting



Analysis

Dashboard

d. Select **Sales - CRM Historical Pipeline**.

e. In order, add:

- **Opportunity:** Opportunity Name, Owner First Name, and Owner Last Name
- **Customer:** Customer Name
- **Industry:** Industry Name
- **Product:** Product Name
- **Revenue:** Revenue ID
- **Pipeline Snapshot Date:** Pipeline Snapshot Enterprise Period
- **Facts > Historical Pipeline Detail Facts:** Opportunity Line Revenue

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering to its name.

Opportunity	Customer	Industry	Product	Revenue	Pipeline Snapshot Date	Historical Pipeline		
Name	Owner First Name	Owner Last Name	Name	Industry Name	Product Name	Revenue ID	Pipeline Snapshot Enterprise Period	Open Oppor

f. Click the **Results** tab. (You might have no Results)

g. Above the **Compound Layout** section, click **New View**

h. In the drop-down, select **Pivot Table**.

i. Delete the table (from **Compound Layout View**).

j. Edit the pivot table so that **Opportunity Name** is the first column (drag and drop).

k. Verify the results show opportunity revenue by month for the quarter.

If only one month is closed you may see only one monthly column.

Pivot Table

Name	Owner First Name	Owner Last Name	Industry Name	Product Name	Name	Revenue ID	01-16	Open Opportunity Line Revenue
Big Data Expansion Project	Lisa	Jones	Communications	Sentinel Power Server 3000	Optical Communications	300000113781837		550,000
Cloud Based Development Project	Liz	Peters	Engineering & Construction	Sentinel Power Server 1000	Pacific Utility Network	300000113781757		980,000
Cloud Computing Deployment	Lisa	Jones	High Technology	Sentinel Power Server 7500	Global Technologies	300000113781663		800,000

l. Save the report as **OpportunityLineRevenue-nn with Pivot**.

4.7 Custom Subject Areas

Goals

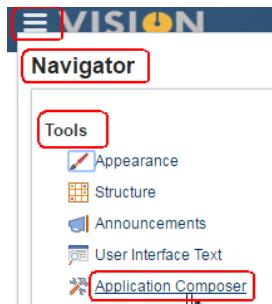
- Create a custom subject area based on custom objects

Overview

In this practice, you will create a custom subject area based on a pair of seeded custom objects. You will not publish the custom subject area as that would create concurrency issues in the classroom.

Tasks

1. Sign in as Bala Gupta, user name **bala.gupta**.
2. **If necessary**, exit your sandbox:
 - a. In the global area, click ApplCoreLongSB_EXT nn , where nn is your student number. More sandbox information should be shown.
 - b. In the Sandbox Information section, click Exit Sandbox.
 - c. Click Yes to confirm you are exiting the sandbox.
 - d. Sign out.
 - e. Sign in to the application using your assigned login.
3. Examine the custom objects for the subject area.
 - a. **Navigate to Application Composer.**



- b. In the regional area, set Application = **Sales**.



Please Notice you need to activate a Sandbox. For more details please check topic “4.3 Add an Infolet to the Dashboard”

Sandbox Tasks

Available only within sandbox.

- Objects
 - Custom Objects**
 - Standard Objects
- Common Setup
 - Relationships
 - Role Security
 - Object Workflows
 - Global Functions
 - Run Time Messages
 - Mobile Application Setup
 - Outlook Setup
 - Personalization
 - Web Services
 - Metadata Manager
- Advanced Setup
 - Copy Maps



Settings and Actions Sign Out

- Personalization
 - Set Preferences...
- Administration
 - Customize Global Page Template...
 - Manage Customizations...
 - Manage Sandboxes...**
 - Setup and Maintenance...
 - Highlight Flexfields...

Manage Sandboxes

Available Sandboxes							View Published Sandboxes								
Actions		View		+ <input type="button" value=""/>	<input type="button" value="X"/>	<input type="button" value="Set as Active"/>	<input type="button" value="Publish"/>	<input type="button" value=""/>	Sandbox Name	<input type="button" value=""/>	<input type="button" value=""/>				
	Sandbox				Description		Active	Flexfield	Last Modified	Last Modified By					
<input type="checkbox"/>	AppCoreLongSB_AppCoreLongSB_EXTLD						<input checked="" type="checkbox"/>		6/24/16	mdsInternal					
<input type="checkbox"/>	AppCoreLongSB_Sandbox25May2016_0238						<input checked="" type="checkbox"/>		5/25/16	mdsInternal					

Warning

Entering the sandbox will take you to the home page. Do you want to continue ?

- c. Expand **Custom Objects**.
- d. Notice that the list includes two custom objects: "**EXT Child**" and "**EXT SalesParent**".

The screenshot shows the Oracle Application Composer interface. At the top, there's a navigation bar with a menu icon and the word 'VISION'. Below it, a red box highlights the 'Application Composer' tab. Under 'Application', a red box highlights 'Sales'. In the 'Objects' section, 'Custom Objects' is selected, and a red box highlights 'EXT SalesParent'. This object is expanded, showing its children: 'Call Report Deprecated', 'Complaint', 'Customer Center Tool', 'EXT Child', 'Fields', 'Pages', 'Actions and Links', 'Security', and 'Server Scripts'. A red box highlights 'EXT Child'. Below this, a table lists 'Custom Objects' with columns for 'Display Label', 'Name', 'Description', 'Parent Object', 'REST Resource', and 'Actions'. Two rows are shown: 'EXT Child' (with 'EXTChild' as the name) and 'EXT SalesParent' (with 'EXTSalesParent' as the name). Both rows have a red box around them.

These objects were created in the mainline for this practice. If you do not see these objects, notify your instructor.

4. Examine the structure of the parent.
 - a. In the regional area, notice that EXT SalesParent is a parent object, as indicated by its icon .
 - b. Expand **EXT SalesParent**.
 - c. Click **Fields**.
 - d. Observe that there are **five custom fields** of varying types; in particular, there is one number field and one currency field. These fields are candidates for **fact** or **measure** columns.

The screenshot shows the 'Fields' section for the 'EXT SalesParent' object. On the left, the object tree shows 'EXT SalesParent' selected. A red box highlights 'Fields' under 'Custom Objects'. The main area displays a table of fields:

Display Label	Name	Type	Required	Updatable	Description
Description	ParentDescription	Text	—	✓	
Name	ParentName	Text	—	✓	
Opportunity	ParentOpportunity	Choice List (Dynamic) <Opportunity/VO>	—	✓	
Size	ParentSize	Number	—	✓	
Value	ParentValue	Currency	—	✓	

- e. Observe that there is a dynamic choice list field that references the Opportunity object. This indicates that the Opportunity object is a related object. You can add fields from a related object to your custom subject area.

5. Examine the structure of **EXT Child**.

- In the regional area, notice that EXT Child is a child object, as indicated by its icon .
- In the regional area, click **EXT Child**.
- In the local area, notice that Parent Object = EXTSalesParent.

EXT Child: Overview

▲ Object Information

Display Label	EXT Child	Record Name Label	EXT Child Name
Plural Label	EXT Child	Parent Object	EXTSalesParent
Name	EXTChild	Description	Demo. Sample object for Extensibility class Child of EXT

- In the regional area, expand **EXT Child**.
- Click Fields.
- Observe there are **five** custom fields of varying types, including one number field, one date, and one currency field. These fields are candidates for **fact** or **measure** columns.

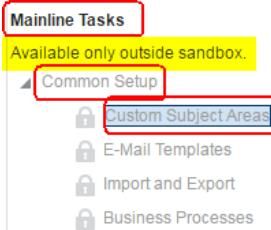
Fields

Custom Standard

Action ▾ View ▾ Search Display Label ▾

Display Label	Name	Type	Required	Updatable	Description
Age	ChildAge	Number	—	✓	
Graduated	ChildGraduated	Date	—	✓	
Name	ChildName	Text	—	✓	
Role	ChildRole	Text	—	✓	
Salary	ChildSalary	Currency	—	✓	

6. Create the **custom subject area**.



Exit the Sandbox

Sandbox AppCoreLongSB_AppCoreLongSB_EXTLD

AppCoreLongSB_AppCoreLongSB_EXTLD Details

Last Modified on 6/24/16 By mdsInternal

More... Exit Sandbox

Exit Sandbox

You have requested to exit out of sandbox AppCoreLongSB_AppCoreLong\$B_EXTLD . Doing so will return you to a sandbox free session.

Leaving the sandbox will take you to the home page.

Do you want to continue ?

Yes **No**

- In the regional area, under **Common Setup**, click **Custom Subject Areas**.
- In the local area, click the **Create** icon.

The screenshot shows the 'Application Composer' interface. In the left sidebar, under 'Common Setup', the 'Custom Subject Areas' item is selected and highlighted with a red box. In the main pane, the title is 'Custom Subject Areas' with a sub-instruction: 'Create custom subject areas using custom or standard objects, and then design and create Answers. You can create reports using only successfully submitted custom subject areas.' Below this is a 'Search' button. A 'Search Results' table is shown with a header row containing 'Actions', 'View', 'Format', and several icons. The first row of the table has a 'Create' button highlighted with a red box. The table also includes columns for 'Description' and other details.

- Set Label = **EXT Parent Child nn**, where nn is your student initials.
- Set Primary Object = **EXT SalesParent**.
- Click **Next**.

The screenshot shows the 'Define Custom Subject Area' step of a wizard. On the left, the navigation tree shows 'Custom Subject Areas' selected. The main area displays the 'Custom Subject Area Details' section. The 'Label' field contains 'EXT Parent Child LD'. Below it is a 'Description' field with a rich text editor. Under the 'Primary Object' section, there is a note: 'Select the top-level entity which drives the configuration of this custom subject area. You cannot change the primary object for subject areas that are submitted with a status of OK.' A dropdown menu is open, showing 'Primary Object' and 'EXT SalesParent' selected. At the bottom right, there are 'Back', 'Next', and 'Save' buttons, with 'Next' highlighted with a red box.

- Select the child objects.
 - Click the "Add Child Object" icon at the right of the EXT SalesParent section.
 - Set Child Object = EXT Child.
 - Click OK.
 - Notice that since EXT Child does not have child objects, you cannot add additional child objects to the subject area (there is no plus sign).
You can add a child, grandchild, and great-grandchild object, but they must all be related. Since EXT Child has no children, you cannot add any more child objects.
 - Click **Next**.

Define Custom Subject Area Select Child Objects Fields Configure Date Leveling Configure Security Review and Submit

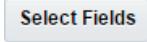
Create Custom Subject Area: Select Child Objects

Add up to three levels of child objects to this custom subject area to provide additional information about the primary object on a report.

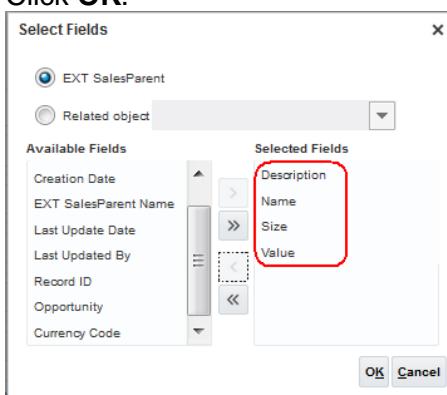
Back Save Cancel

EXT SalesParent
* Display Label <input type="text" value="EXT SalesParent"/>
EXT Child
* Display Label <input style="border: 2px solid red;" type="text" value="EXT Child"/>

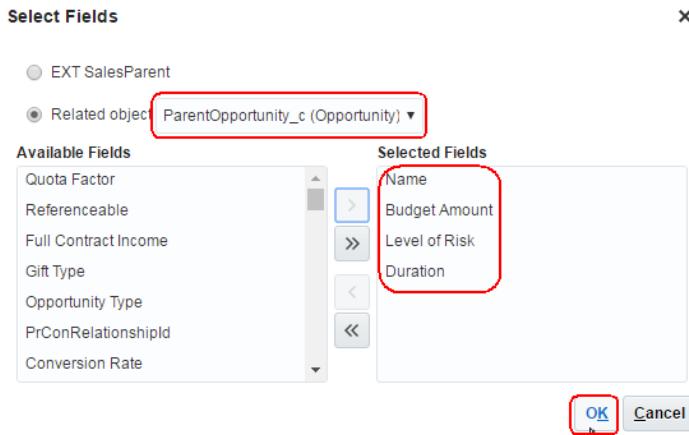
8. Select the fields for the subject area.
 - a. Notice that by default all of the fields from the parent object are included.
 - b. Click the Select Fields button.

- c. In the **Selected Fields** dialog , **CTRL-click** to select:
- Record ID
 - Ext SalesParent Name
 - Last Update Date
 - Last Updated By
 - Creation Date
 - Created By
- and move them to Available Fields pane (the left pane). This should leave Description, Size, Name, and Value as the subject area fields for the parent object.
Reducing the number of subject area fields improves performance.

- c. Click **OK**.



- e. Click **Select Fields** again.
It was not necessary to close the dialog box, but when you are first learning to build custom subject areas it can help immensely to do one object at a time.
- f. Add fields from the related **Opportunity** object.
- 1) Select the Related object radio button.
 - 2) Accept the default value of ParentOpportunity_c(Opportunity). This refers to the Opportunity object.
 - 3) In the Available Fields column, select:
 - Name
 - Budget Amount
 - Level of Risk
 - Duration
 and move them to the Selected Fields pane.
- g. Click **OK**.



- h. In the local area, expand **EXT SalesParent**.
- i. Notice that the **number** and **currency** fields are not designated as **measures**, as indicated by the available drop-downs in the Measure Aggregation column.

Label	Data Type	Display Label	Measure Aggregations
EXT SalesParent	EXT SalesParent		
Description	String	Description	
Name	String	Name	
Size	Number	Size	
Value	Currency	Value	
ParentOpportunity_c	ParentOpportunity_c		
Budget Amount	Number	Budget Amount	
Duration	Number	Duration	

- j. For Size, set Measure Aggregations = All.
If you know you will not be using certain aggregations for reporting, you can exclude them to improve usability.
 - k. For Value, set Measure Aggregations = Maximum, Minimum, and Average.
 - l. In the local area, expand **ParentOpportunity_c**.
 - m. Observe that the two number columns that you selected (**Budget Amount** and **Duration**) are not designated as **measure** fields.
 - n. For Budget Amount, set Measure Aggregations = Total and Average.
 - o. For Duration, set Measure Aggregations = Maximum, Minimum, and Average.
9. Select the child fields for the subject area.
- a. Set Fields From = **EXT Child**.
-
- b. Click the **Select Fields** button.

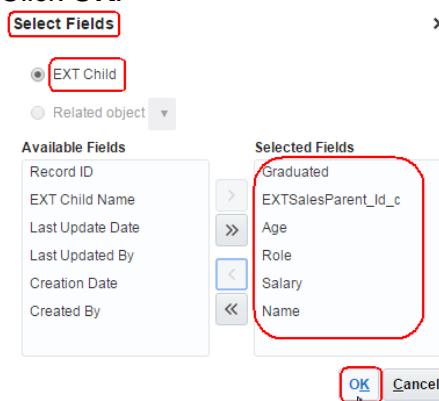
- c. In the **Selected Fields** pane, Ctrl-click to select

- Record ID
- EXT Child Name
- Last Update Date
- Last Updated By
- Creation Date
- Created By

and move them to **Available Fields** pane.

This should leave Graduated, EXTSalesParent_Id_c, Age, Role, Salary, and Name as selected fields.

- d. Click **OK**.



- e. In the local area, expand **EXT Child**.

- f. Observe that the date, number, and currency fields are designated as measures.

Label	Data Type	Display Label	Measure Aggregations
EXT Child		EXT Child	
Age	Number	Age	Average,Median
Currency Code	String	Currency Code	
EXTSalesParent_Id_c	Number	EXTSalesParent_Id_c	
Graduated	Date	Graduated	
Name	String	Name	
Role	String	Role	
Salary	Currency	Salary	

- g. For **Age**, set Measure Aggregation = **Average** and **Median**.

- h. Leave the other measure aggregations blank.

- i. Click **Next**.

12. Examine **Date Leveling**. Date leveling is used to roll up data by date. For this exercise you will not enable date leveling.

- a. In the local area, expand **EXT Child**.

- b. Observe that only date fields for the objects are displayed. You can designate a date

field for date leveling.

- b. Click **Next**.

Create Custom Subject Area: Configure Date Leveling ?

Enable one or more fields for date leveling. Date leveling enables the aggregation of report data over a period of time for the custom subject area.

Date Field Leveling

Date Field	Allow Leveling
EXT Child Graduated	<input type="checkbox"/>

Back **Next** Save Submit Cancel

13. **Configure** the custom object **security**.

- a. Accept the default of Read for all roles.
- b. Click Next.

Create Custom Subject Area: Configure Security ?

Specify which roles can or cannot use this custom subject area to build reports.

Role Access Security

Role Name	Role Description	Read	No Access
Everyone	Allows access to the custom subject area to all users by default, when defining reports.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Back **Next** Save Submit Cancel

14. Review the structure of the custom subject area.

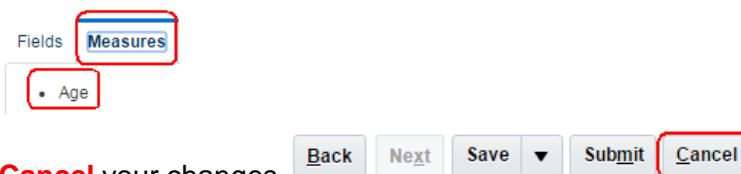
- Observe that a hub and spoke diagram is displayed similar to:



- At the bottom of the diagram, note that measures and implicit facts for the subject area are listed (one tab for measures, one for implicit facts).
- In the local area, in the diagram, click **EXT Child**.
- Notice that the tabs at the bottom become "Fields" and "Measures", listing fields and measures for this object.



- In the **Fields** tab at the bottom, observe that all of the fields you selected for EXT Child are displayed in the Fields section.
- Click the **Measures** tab.
- Observe that the field you designated as a measure (**Age**) is displayed.



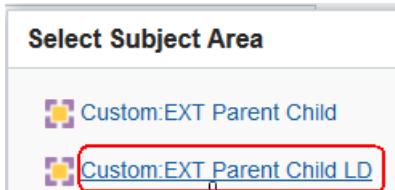
15. **Cancel** your changes

[Back](#) [Next](#) [Save](#) [Submit](#) [Cancel](#)

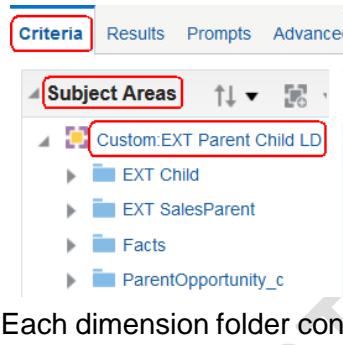
In the classroom build, **you must not publish your new subject area**.

- Click **Cancel**.
- Click **Yes**.

16. **Sign out** of the application.
17. The following screenshots illustrate the results of publishing your custom subject area.
 - a. Your new custom subject area appears in the list of subject areas when you click the Create icon in the Reports and Analytics regional area.
 - b. Note the name of your subject area is prefixed with **Custom**:



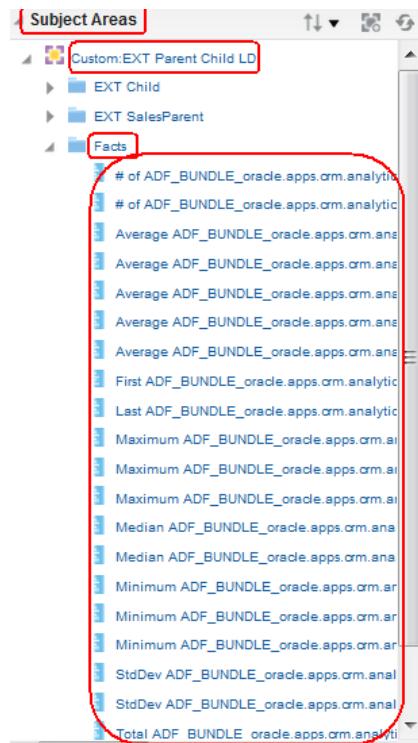
- c. The subject area contains several folders:
 - A dimension folder for each of the objects in the subject area
 - A fact folder that contains all the columns designated as measures.
 - Since date leveling was not enabled there are no additional date-related folders:



- Each dimension folder contains the fields you selected when you configured the subject area.



- The fact folder contains the full set of aggregated measures for each field that you designated as a measure.



- This subject area is now ready for creating reports based on the EXT SalesParent and EXT Child custom objects.

4.8 Navigating from one Report to another Report

Goals

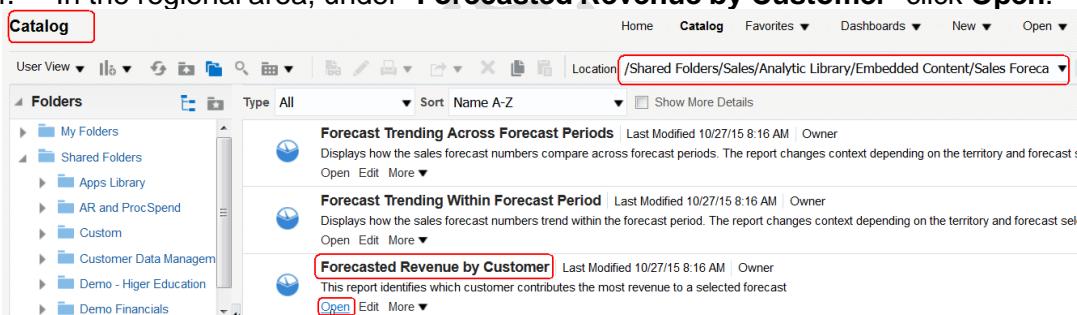
- Configure a report to allow drilling down to a detailed report about a record in the first report

Overview

In this practice you will configure a source report that displays information about customers to enable drilldown to a customer pipeline report for the selected customer.

Tasks

- Sign in to the application using **Lisa Jones** login.
- Examine the reports you will configure in this practice.
 - Navigate to **Reports and Analytics**.
 - Click the **Browse Catalog** icon  to invoke an Oracle Business Intelligence session in a new browser tab.
 - In the **Catalog** area, expand **Shared folders**.
 - Expand **Sales > Analytic Library > Embedded Content**.
 - Click **Sales Forecasting**.
 - In the regional area, under "**Forecasted Revenue by Customer**" click **Open**.

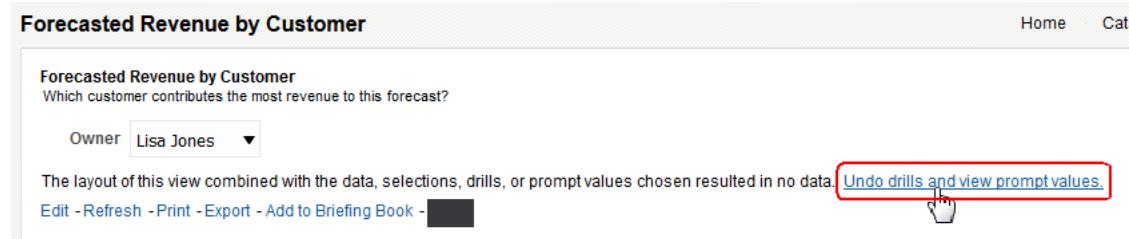


The screenshot shows the Oracle BI Catalog interface. The top navigation bar includes Home, Catalog, Favorites, Dashboards, New, and Open. The Catalog tab is selected. The left sidebar shows 'Folders' with categories like My Folders, Shared Folders, and Custom. The main content area displays a list of reports under 'Sales Forecasting'. One report, 'Forecasted Revenue by Customer', is highlighted with a red box around its name and the 'Open' button below it. The URL in the browser's address bar is '/Shared Folders/Sales/Analytic Library/Embedded Content/Sales Foreca'.

The **Forecasted Revenue by Customer** report should open.

- Set Owner = **Lisa Jones**.
- Observe that a combination bar and line chart appears.

This type of chart is known as a Pareto chart.

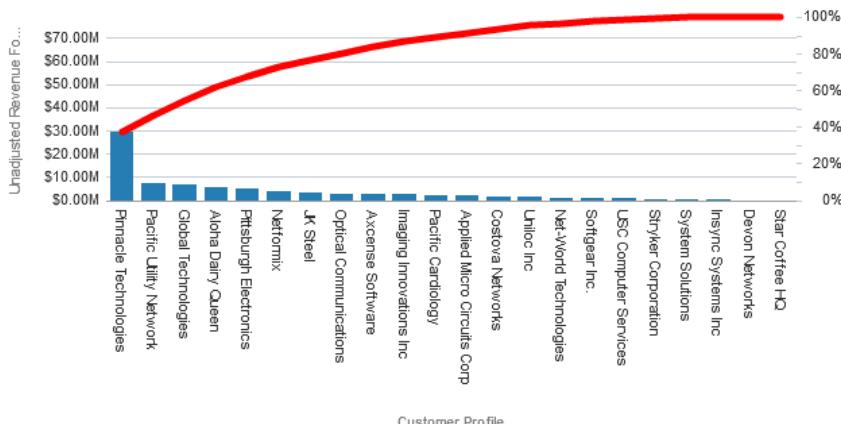


The screenshot shows the 'Forecasted Revenue by Customer' report view. The title bar says 'Forecasted Revenue by Customer'. The main content area has a heading 'Forecasted Revenue by Customer' with the sub-instruction 'Which customer contributes the most revenue to this forecast?'. Below this is a 'Owner' dropdown set to 'Lisa Jones'. At the bottom, there is a message: 'The layout of this view combined with the data, selections, drills, or prompt values chosen resulted in no data.' followed by a link 'Undo drills and view prompt values.' which is highlighted with a red box and a cursor arrow pointing to it. Navigation links at the bottom include Edit, Refresh, Print, Export, and Add to Briefing Book.

Forecasted Revenue by Customer

Which customer contributes the most revenue to this forecast?

Owner Lisa Jones ▾



- i. Hover the mouse over one of the bars (a customer), and observe that the Customer Name and Unadjusted Forecast value appears in a popup.
 - j. Try clicking various areas of the report:
 - Click one of the bars.
 - Click a customer name.
 - Click a percentage.
 - Click a revenue forecast number.
 - k. Notice that nothing happens when you click anywhere on the report; **no navigation is configured for this report**.
 - l. Leave this browser tab open.
- You will configure this report to **navigate** to a report that displays **the opportunities by sales stage** for the customer.
3. Examine the target report.
 - a. Return to the "**Reports and Analytics**" browser tab to return to Reports and Analytics in the application.
 - b. Click the **Browse Catalog** button to invoke a second Oracle Business Intelligence browser tab.
 - c. If necessary, in the regional pane, expand **Shared Folders > Sales > Analytic Library**.
 - d. Click **Customers**.
 - e. In the regional area, under "**Customer Pipeline**" click **Open**.

The Customer Pipeline report should open.

Location
/Shared Folders/Sales/Analytic Library/Customers

This is a tabular report showing opportunity information by sales stage aggregated over customer.

Customer Pipeline

Sales Stage Name	Open Opportunity Revenue	# of Open Opportunities
01 - Qualification	2,856,000	4
02 - Discovery	910,000	3
03 - Building Vision	5,124,000	6
04 - Presentation	5,480,950	7
05 - Agreement	3,979,800	10
06 - Negotiation	1,226,450	10
07 - Closed		0

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

You will be modifying this report to **show open opportunity revenue by customer**.

- f. In the secondary application menu, click **Catalog** to return to the catalog page.

Customer Pipeline

Home [Catalog](#)

Customer Pipeline

Sales Stage Name	Open Opportunity Revenue	# of Open Opportunities
01 - Qualification	2,856,000	4
02 - Discovery	910,000	3
03 - Building Vision	5,124,000	6
04 - Presentation	5,480,950	7
05 - Agreement	3,979,800	10
06 - Negotiation	1,226,450	10
07 - Closed		0

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

4. Modify the report to show the customer name.
 - a. In the local area, under "**Customer Pipeline**" click **Edit**.
 - b. If necessary, in the upper left, click the **Criteria** tab.
 - c. In the regional area, expand **Customer**.
 - d. Double-click Customer **Name** to add it to the report. You may need to scroll down.

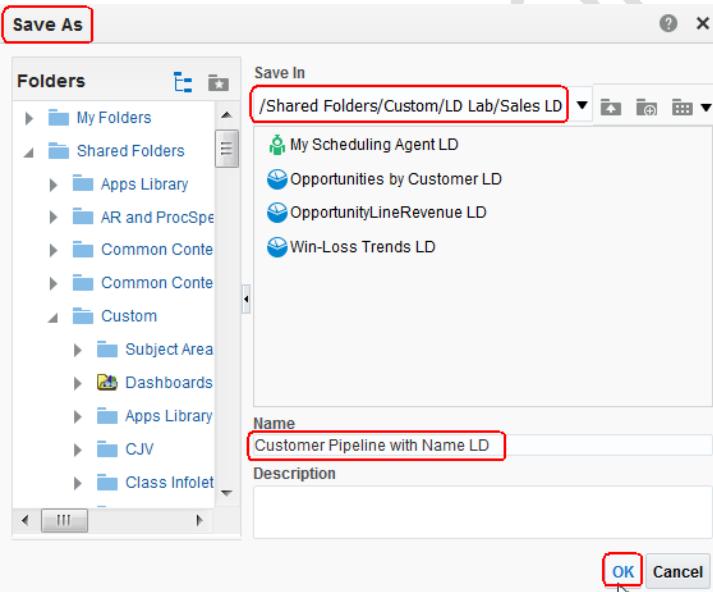
- e. Drag and drop Customer **Name** to the left of Opportunity **Sales Stage Name**.

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop color formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Customer	Opportunity	Pipeline Facts
Name	Sales Stage Name	Open Opportunity Revenue # of Open Opportunities

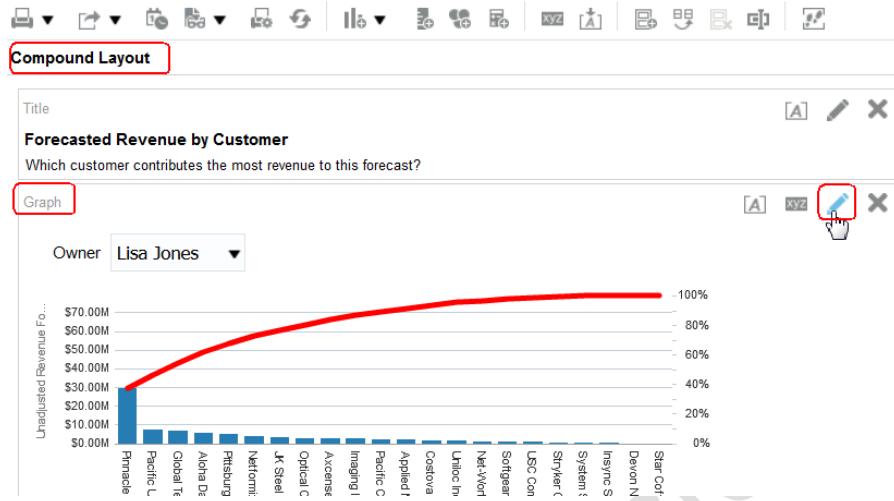
- f. In the upper left, click the **Results** tab.
g. In the results, drag the **Customer Name** column to the left of the report.
Note that the report now displays opportunity information by customer.
h. **Save** the custom report.
- 1) In the upper right, click the **Save As** button.
 - 2) Navigate to **Shared Folders > Custom > LD Lab > Sales nn**, where *nn* is your student **initials**.
You created this folder in a previous practice. If it does not exist, create it now.
 - 3) Set Name = **Customer Pipeline with Name nn**, where *nn* is your student **initials**.
 - 4) Click **OK**.



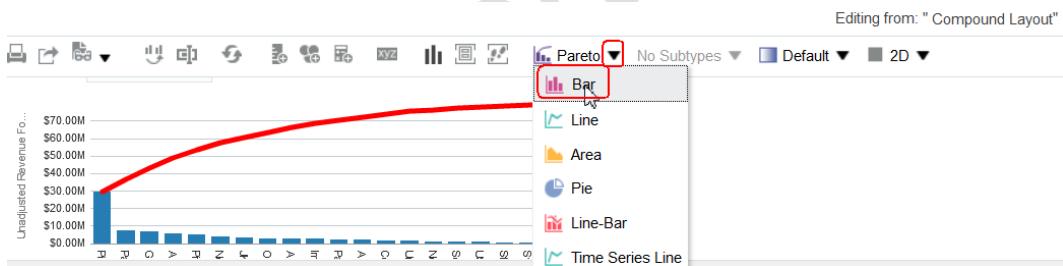
- 5) Verify that no errors appear; that is, that the report saves successfully.
 - i. Close this browser tab

You have created a report to which users will navigate when they drill down on the customer name in the original report.
5. Edit the source report.
 - a. Return to the browser tab with the **Forecasted Revenue by Customer** chart.
 - b. In the secondary application menu, click Catalog to return to the catalog page.
 - c. In the regional area select **Shared Folders > Sales > Analytic Library > Embedded Content > Sales Forecasting**.

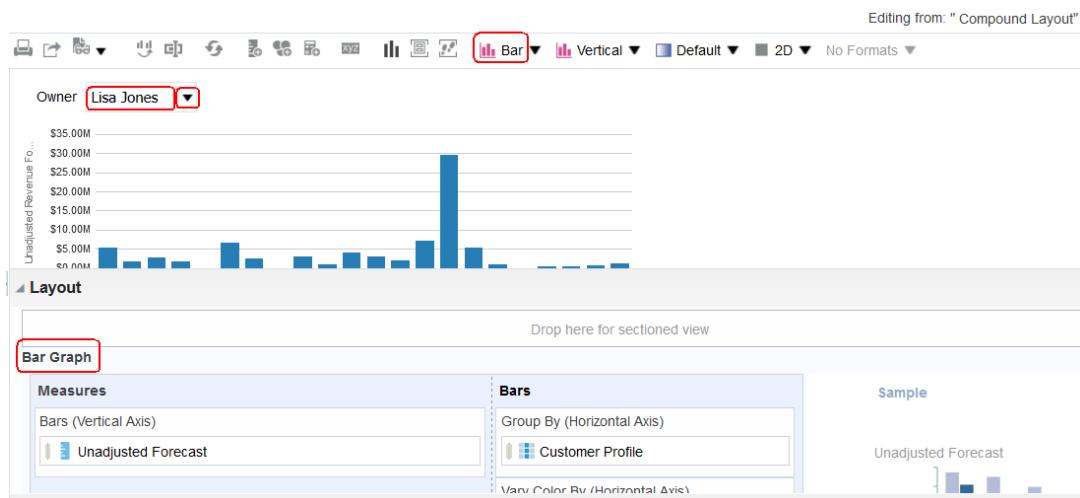
- d. In the local area, under "Forecasted Revenue by Customer" click **Edit**.
- e. Change the layout of the report to a simple bar chart.
- 1) In the local area, in the Graph section of the report, click the **Edit View** icon.



- 2) At the top of the report pane, expand Pareto and use the View Type list to change the view type to **Bar**.



- 3) Set Owner = **Lisa Jones**.
- 4) Observe that a bar graph appears in the Layout section.



- f. Click the **Criteria** tab. If you are prompted to keep your changes, click **Yes**.
- g. Add Customer Name column; to the right of Customer Name, expand the drop-down and select **Column Properties**.

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, filter, apply sorting, or delete by clicking or hovering over the button next to its name.

Selected Columns

Territory	Sales Forecast	Customer	Revenue Forecast Facts
Territory Id	Forecast Name	Forecast Type Code	Customer Profile
Owner	Customer Name	Customer Profile	Name
	Customer Profile	Customer Profile	Unadjusted Forecast

Filters

Add filters to the analysis criteria by clicking on Filter option for the specific column in the Selected Columns pane, or by clicking on the Column Properties pane header.

Sort

Edit formula

Column Properties

6. Configure the navigation details.

- In the **Column Properties** window, click the **Interaction** tab.

- Notice that there are interactions for both Column Heading and Value.

The **Column Heading** interaction allows you to determine a behavior on clicking a column heading; for example, if you click the "Customer Name" column heading perhaps you navigate to a report for all customers. The **Value interaction** allows you to determine a behavior on clicking a particular value; for example, if you click a particular Customer Name you navigate to a report for a particular customer. For this practice, you will use the **Value** section.

- Under Value, set **Primary Interaction = Action Links**.

Column Properties

Style Column Format Data Format Conditional Format **Interaction**

Column Heading

Primary Interaction Default (Drill) ▾

Value

Primary Interaction Action Links

Action Links

Link Text	Action	Show Link
Add Menu Action Links		+ X
		↑ ↓ ↗ ↘
		✖

Do not display in a popup if only one action link is available at runtime
 Enable on Totals

- Create an action that navigates to your customer pipeline report.

- Click the **Add Action Link** icon

- In the New Action Link dialog box, set **Link Text = Drill to Opportunities by Customer**.

This text appears when the user hovers the mouse over a bar in the chart.

- Click the Create New Action icon

- In the drop-down, select **Navigate to BI Content**.

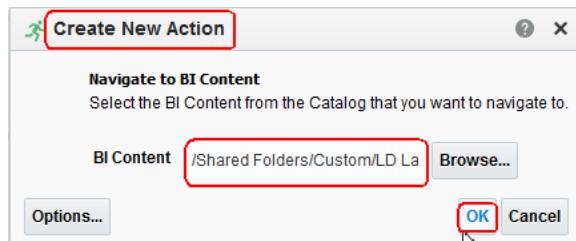
This action navigates you to another report. Notice that you could also navigate to a web page or invoke a service, method, or script when the user clicks the item.

- In the Select BI Content For Action dialog box, navigate to **Shared Folders > Custom > LD Lab > Sales nn**, where *nn* is your student initials.

- Select **Customer Pipeline with Name nn**, where *nn* is your student initials.

This specifies the target report.

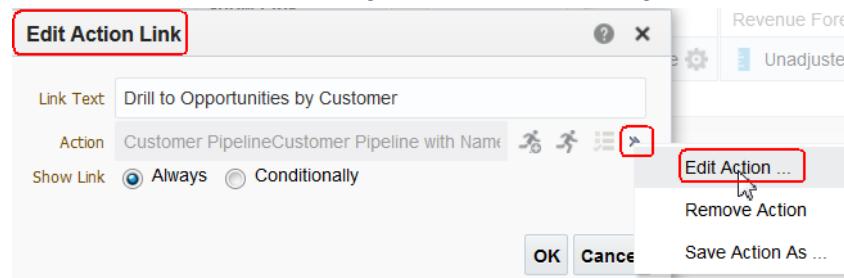
- 7) Click **OK** to close the Select BI Content for Action window.



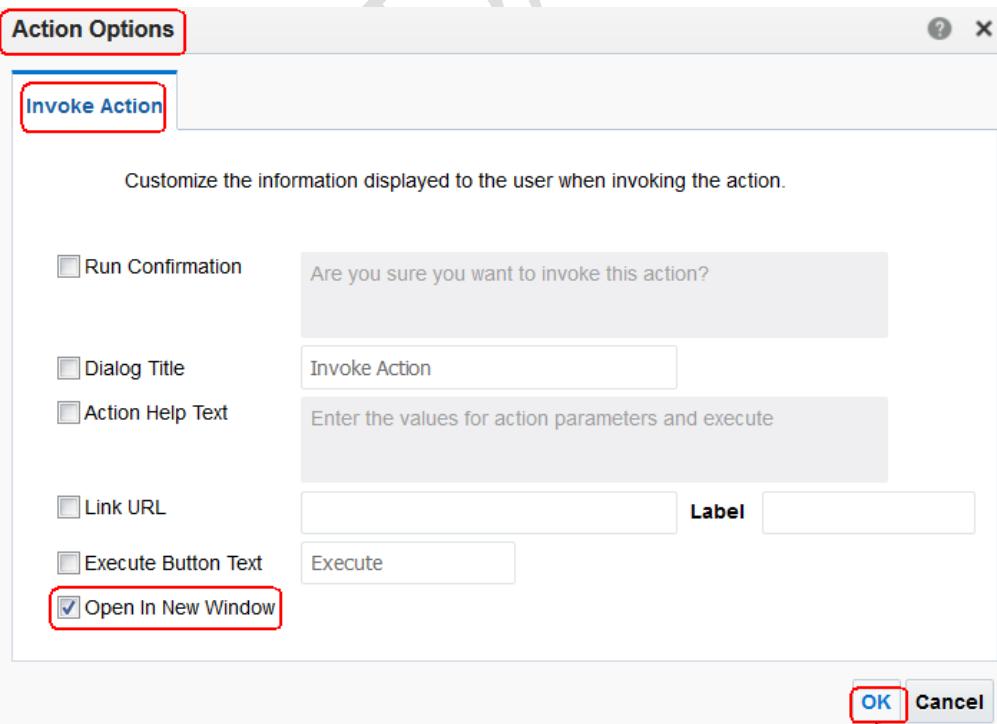
- 8) Click **OK** to close the Create New Action window.

- e. Add a specification that this report should open in a new window, rather than in the existing window.

- 1) In the New Action Link dialog window, at the far right, click the More icon ➔.

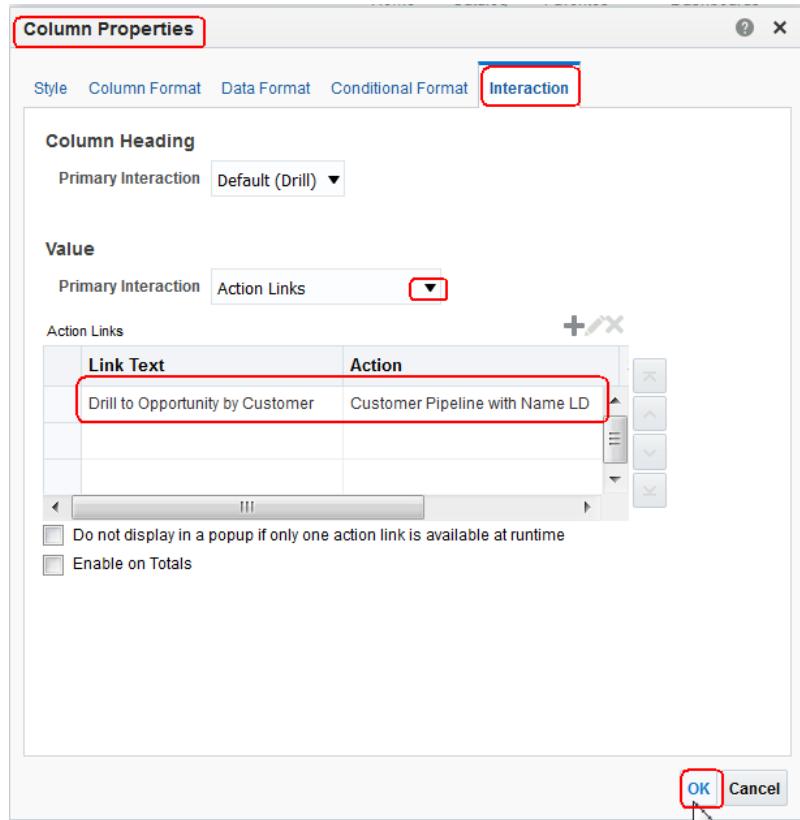


- 2) In the More drop-down, select Edit Action.
 3) In the **Edit Actions** window, click Options.
 4) In the Action Options window, select the "Open In New Window" check box.
 5) Click **OK** to close the Active Options dialog box.

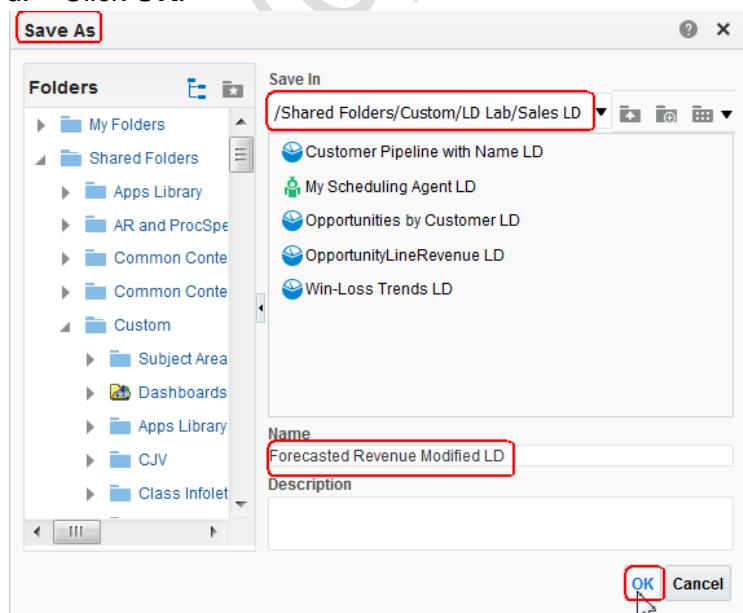


- 6) Click **OK** to close the Edit Action dialog box.
 7) Click **OK** to close the New Action Link dialog box.

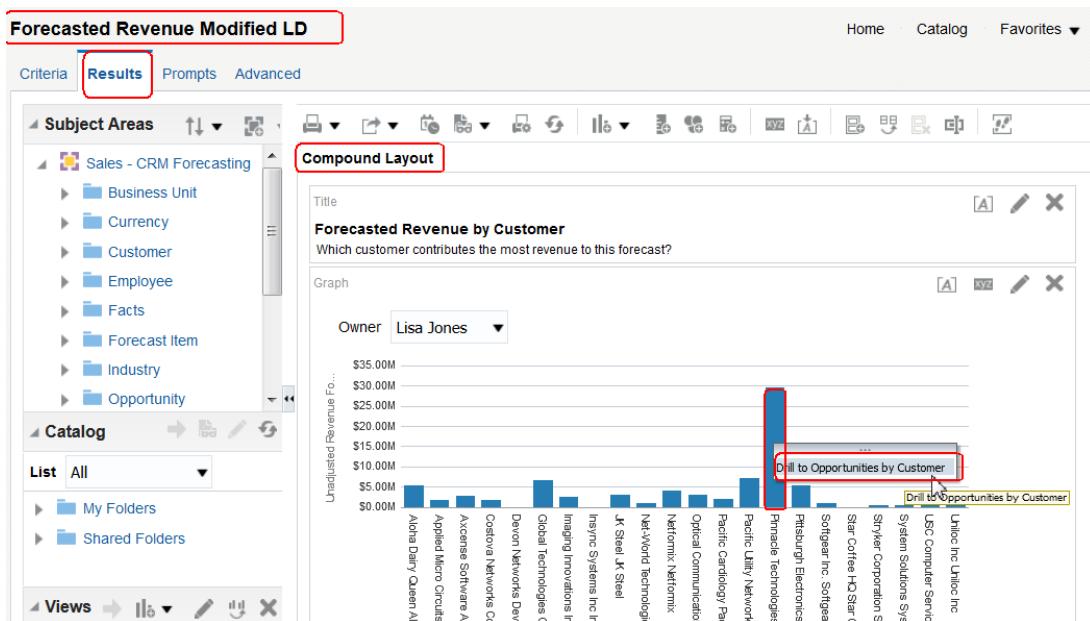
- f. Verify that the new action link is listed under "Action Links".
- g. Click **OK** to close the Columns Properties popup.



7. Save the modified report.
 - a. In the upper right corner, click the **Save As** button.
 - b. Navigate to **Shared Folders > Custom > LD Lab > Sales nn**, where *nn* is your student initials.
 - c. Set Name = **Forecasted Revenue Modified nn**, where *nn* is your student initials.
 - d. Click **OK**.



- e. Verify that no error messages are displayed; that is, that your report saves successfully.
- 8. Test that the navigation works.
 - a. Click the **Results** tab.
 - b. Set **Owner = Lisa Jones**.
 - c. Hover the cursor over a bar, and observe that the Customer Name and Unadjusted Forecast values are displayed exactly as before.
 - d. Click the bar, and observe that the action link you configured appears; that is, you can select "Drill to Opportunities by Customer".



- e. Select the action link "**Drill to Opportunities by Customer**".
- f. Verify that a new tab opens with your modified customer pipeline report and that the report displays information about the customer you selected.
- g. Return to the Oracle BI Answers session browser tab.
- h. Click another customer bar and select "Drill to Opportunities by Customer".
- i. Verify that your modified customer pipeline report appears for the new customer you selected.
- j. **Close** the two customer pipeline report browser tabs.
- k. **Close** any open Oracle BI Answers browser tabs.
- l. If an "Are you sure?" dialog appears, click Leave Page.
- 9. Remain signed in for the next practice.

4.9 Navigating from a Report to an Object Page

Goals

- Configure a report to allow drilling down from a row in a report to the detail page for the record

Overview

In this practice, you will modify a report to enable drilldown to a detail page.

Sign in to the application using **Lisa Jones** login

Tasks

- Examine the reports you will configure in this practice.
 - If necessary, navigate to **Reports and Analytics**.
 - Click the **Browse Catalog** icon to open an Oracle Business Intelligence session in a new browser tab.
 - In the regional area, expand **Shared Folders > Sales > Analytic Library**.
 - Click **Pipeline**.
 - In the local area, under "**Opportunity Sales Stage Detail**" click **Open**.

The screenshot shows a browser window with the Oracle Business Intelligence interface. The URL in the address bar is "/Shared Folders/Sales/Analytic Library/Pipeline". Below the address bar, there's a toolbar with various icons. In the main content area, there's a table with a single row. The first column contains a small icon followed by the text "Opportunity Sales Stage Detail". To the right of this, it says "Last Modified 6/25/16 5:48 AM | Owner". Below the table, there's a toolbar with "Open", "Edit", and "More" buttons. The "Open" button is highlighted with a red box.

- Observe that a tabular report appears and displays several fields for each opportunity.

Name	Days Stalled	Expected Close Date	# of Days in Current Stage	Average Duration of Stage
Pinnacle Technologies Green Server		3/31/12		8
Pinnacle technologies seattle DataCenter Upgrade		3/31/12		8
Pinnacle Technologies NorthWest DataCenter		3/31/12		8
Pinnacle - Virtualization Software Project		9/30/12	870	8
Pinnacle Elite Server Opportunity		9/30/12	870	8
Pinnacle Technologies Green Rack Server	6/30/12			8
Pinnacle technologies Annual Server Maintanence	6/30/12		870	8
Pinnacle Technologies EP600 Power Server Opportunity		12/31/12	870	8
Imaging Innovations Green Rack Server Opportunity		3/31/12		8
Imaging Innovations Annual Server Maintanence		3/31/12		8
Imaging Innovations- Virtualization Software Project		3/31/12	870	8
Imaging Innovations Elite Server Opportunity		9/30/12	870	8
Imaging Innovations New Data Center Opportunity		9/30/12	870	8
Imaging Innovations Server Upgrade Opportunity	6/30/12			8
Pacific Utility Network Green Server		6/30/12		8
Pacific Utility Network seattle DataCenter Upgrade		12/31/12		8

- Hover the cursor over the **Opportunity Name** column for a record and observe **there are no action links enabled** (there is no drilldown on the Opportunity Name).
- Attempt to drill down on other fields. Notice that no drilldowns are enabled at all.

You will configure this report to navigate to the opportunity detail page in Oracle

Sales Cloud for the opportunity. You first will add the Opportunity Id column to the report, as the Id field is required to retrieve the record.

2. Modify the report to show **Opportunity Id**.
 - a. In the secondary application menu, click **Catalog** to return to the catalog page.
 - b. In the local area, under "**Opportunity Sales Stage Detail**", click **Edit**.
 - c. In the upper left, click the **Criteria** tab.
 - d. If the **Opportunity ID** column appears in the Selected Columns pane in the local area, expand the drop-down at the right of Opportunity ID and select **Delete**.

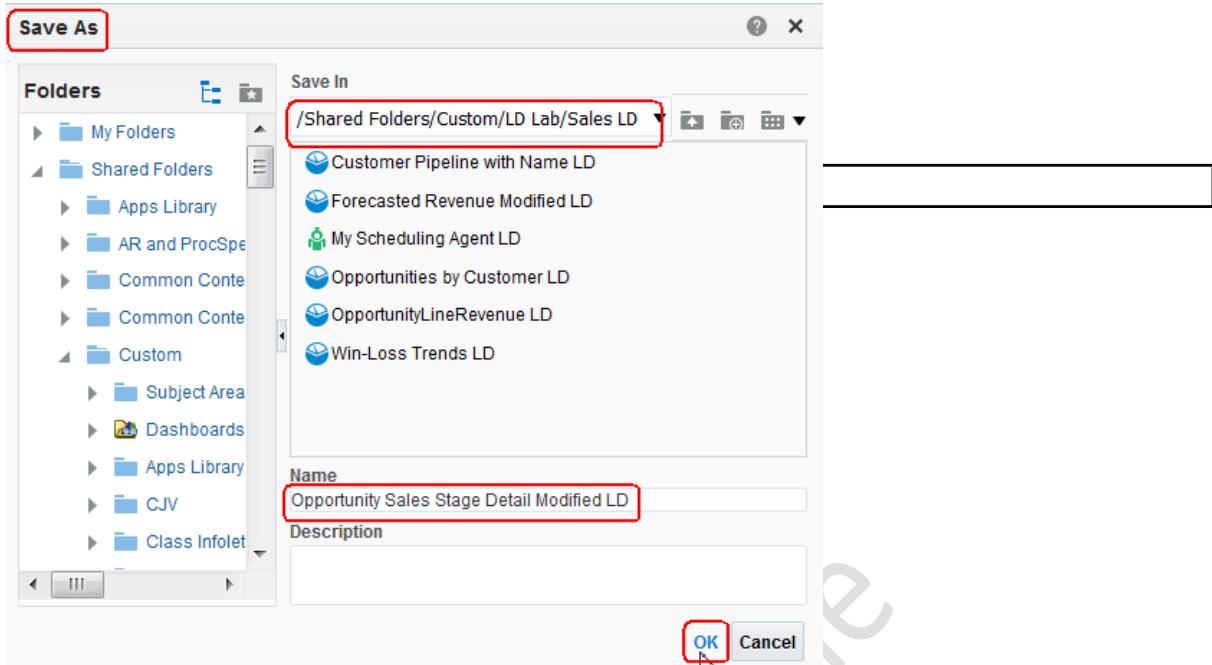
The screenshot shows the Oracle BI Catalog interface. In the 'Selected Columns' pane, there are two sections: 'Opportunity' and 'Time'. Under 'Opportunity', there are columns for 'Name' and 'Opportunity ID'. Under 'Time', there is a column for 'Expected Close Date'. A context menu is open over the 'Opportunity ID' column, with options like 'Sort', 'Edit formula', 'Column Properties', 'Filter', and 'Delete'. The 'Delete' option is highlighted with a red box.

You need to explicitly add the Opportunity ID column to make this practice work in this environment.

- e. Add Opportunity ID back to the report.
 - 1) In the regional area, expand **Opportunity**.
 - 2) Double-click **Opportunity ID**.
 - 3) In the local area, drag and drop to reposition **Opportunity ID** to the right of **Opportunity Name**.

The screenshot shows the Oracle BI Catalog interface. In the 'Selected Columns' pane, there are three sections: 'Opportunity', 'Time', and another unnamed section. Under 'Opportunity', there are columns for 'Name' and 'Opportunity ID'. Under 'Time', there is a column for 'Expected Close Date'. In the unnamed section, there is a column for '# of Days in Current Stage'. The 'Opportunity ID' column is highlighted with a yellow box.

3. Save the modified report.
 - a. In the upper right corner, click the **Save As** button.
 - b. Navigate to **Shared Folders > Custom > LD Lab > Sales nn**, where *nn* is your student initials.
You created this folder in a previous practice. If you do not see it, create it now.
 - c. Set Name = **Opportunity Sales Stage Detail Modified nn**, where *nn* is your initials number.
 - d. Click **OK**.



- e. Verify that you receive no error messages; that is, that the report saves successfully.
4. **Enable an action link on the report.**
- a. Next to **Opportunity Name**, expand the drop-down and select **Column Properties**.
 - b. Click the **Interaction** tab.
 - c. In the **Value** section, set **Primary Interaction = Action Links**.
Be very careful to set the Value rather than the Column Heading. You want the drilldown to be on the record itself, not on the column header.
 - d. Click the **Add Action Link** icon
 - e. In the New Action Link dialog box, set **Link Text = Drill to Opportunity Details**.
This text appears when the user hovers the cursor over a record in the report.
 - f. Click the **Create New Action** icon
 - g. Select **Navigate to a Web Page**. Leave this window open.
 - h. Get the appropriate URL:
 - 1) Return to the "Search - Reports and Analytics" browser tab.
 - 2) Click the **Home** icon to return to the simplified home page.
 - 3) Click the **Opportunities** tile.
 - 4) In the address bar, select and copy the URL up to .com.

This should include the server name, port number, and whether you are using HTTP or HTTPS; for example

<https://adc-fap0123-crm.oracledemos.com>
<https://rws-fap0700-fs.oracledemos.com>
<https://rws-fap1595-crm.oracledemos.com/>

- i. Return to the Oracle BI Answers tab.
- j. In the Create New Action window, paste in the URL you just copied.

k. Add to the end of the URL:

```
/sales/faces/CrmFusionHome?cardToOpen=MOO_OPPTYMGMTOPPORTUNITIES
_CRM_CARD&tabToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM&TF_skipToEdit
OptyId=@{3}
```

Your complete URL should resemble:

```
https://adc-fap0123-
crm.oracledemos.com/sales/faces/CrmFusionHome?cardToOpen=MOO_OPPTYMGMTOPPORTUNITIES
_CRM_CARD&tabToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM&TF_skipToEditOptyId=@{3}
```

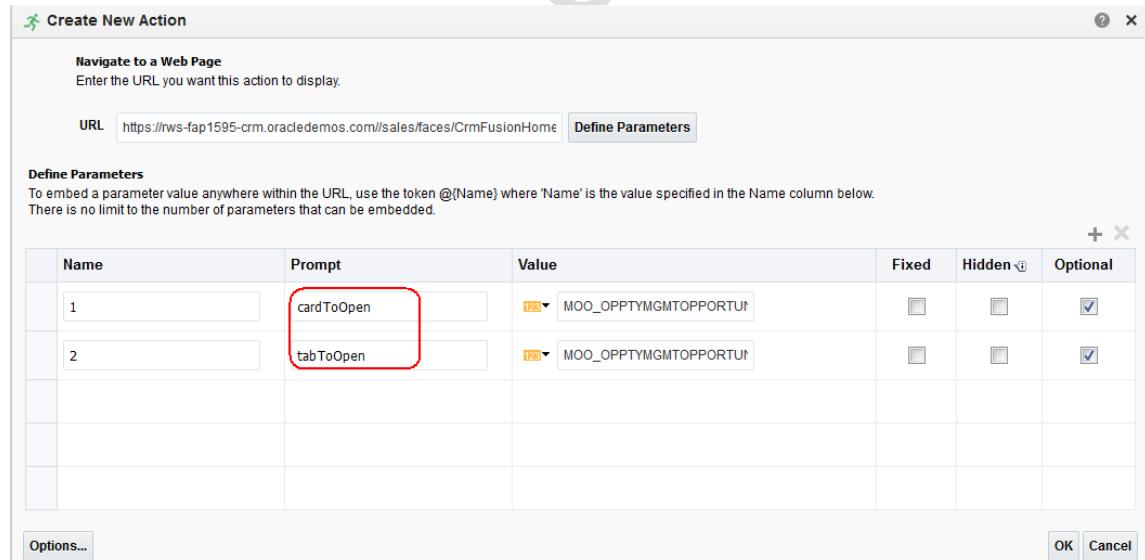
This URL provides:

- The server name, port number, and protocol; for example, **https://adc-fap0123-crm.oracledemos.com**.
- The path to the simplified pages: **/sales/faces/CrmFusionHome**.
- The page type: ?
cardToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM_CARD.
- Which tab to open on that page:
&tabToOpen=MOO_OPPTYMGMTOPPORTUNITIES_CRM.
- Which opportunity to edit: **&TF_skipToEditOptyId=@{3}**.

5. Specify a value for the parameter.

a. Click **Define Parameters**.

b. Notice that the cardToOpen and tabToOpen parameters are already recognized.



c. In the **Define Parameters** section, click the Add Parameter icon **+**.

d. Use the drop-down just to the left of the Value column to select **Value Type = Column Value**.

Create New Action

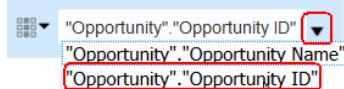
Navigate to a Web Page
Enter the URL you want this action to display.

URL **Define Parameters**

Define Parameters
To embed a parameter value anywhere within the URL, use the token {@Name} where 'Name' is the value specified in the Name column below.
There is no limit to the number of parameters that can be embedded.

Name	Prompt	Value	Fixed	Hidden	Optional
1	cardToOpen	MOO_OPPTYMGMTOPPORT1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2	tabToOpen	MOO_OPPTYMGMTOPPORT1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3	Enter Prompt Here...	<input style="border: none; background-color: transparent; font-size: small;" type="button" value="Value"/> <input style="border: none; background-color: transparent; font-size: small;" type="button" value="Session Variable"/> <input style="border: none; background-color: transparent; font-size: small;" type="button" value="Repository Variable"/> <input style="border: 1px solid red; border-radius: 5px; padding: 2px; font-size: small;" type="button" value="Column Value"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="button" value="Options..."/> <input type="button" value="OK"/> <input type="button" value="Cancel"/>					

- e. Use the drop-down to set **Column Value = "Opportunity"."Opportunity ID"**.



- f. Select the **Hidden** check box for all of the records.

You do not want the user to modify these parameters.

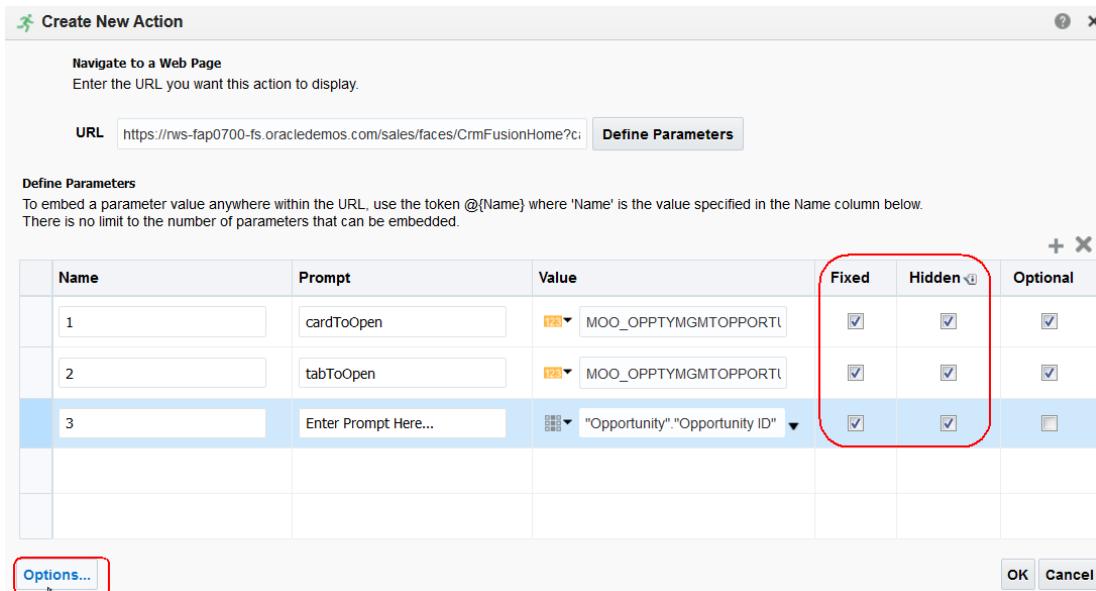
- g. Notice that the **Fixed** check box is automatically selected as well.

If a user cannot see the value, the value must be fixed.

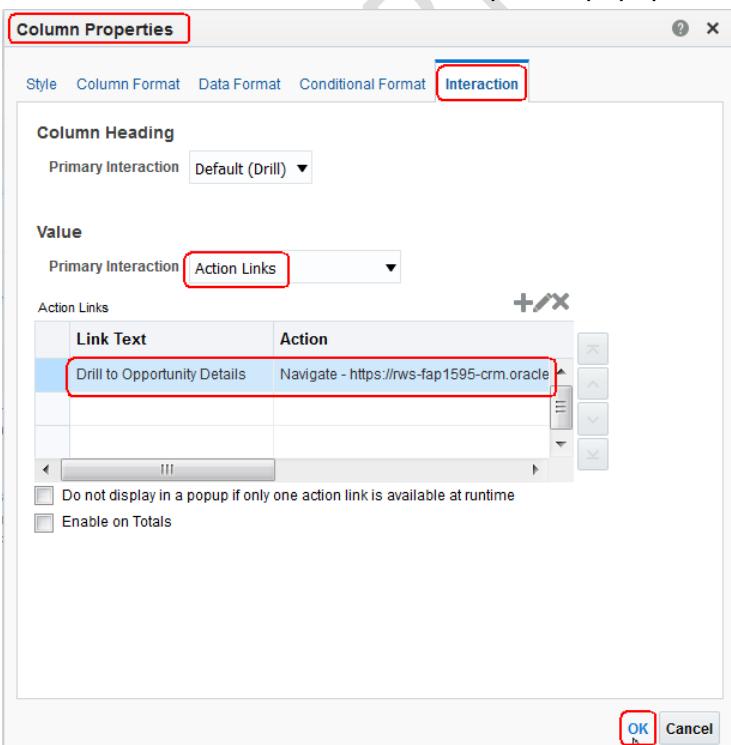
- h. Leave the **Prompt** field at its default.

Since the parameters are hidden, there is no need to provide prompt text.

- i. In the lower left, click **Options**.



- j. In the **Action Options** dialog box, select the "Open In New Window" checkbox.
k. Click **OK** to close the Action Options dialog box.
l. Click **OK** to close Create New Action popup.
m. Click **OK** to close the New Action Link dialog box.
n. Verify that the Action Link was successfully configured; that is, there is an action link listed.
o. Click **OK** to close the Column Properties popup.



6. Click the **Save Analysis** button to save the modified report.

7. Test that the navigation works.
 - a. Click the **Results** tab.
 - b. Verify that the report appears.
 - c. Verify that the **Opportunity Names** are hyperlinked to indicate a configured action link; the hyperlink appears when you hover over an opportunity name.

Opportunity Sales Stage Detail Modified LD

Table

Name	Days Stalled	Expected Close Date	# of Days in Current Stage	Average Duration of Stage	Opportunity ID
A-Green Server-2012-SP0346	5/11/12		828	8	300000073824954
A-Green Server-2012-SP0551	5/11/12		828	8	300000073826389
A-Sentinel Power-2012-SP0965	5/25/16			8	300000073829287
Applied-Green Server-2012-SP0423	5/11/12			8	300000073825493
Applied-Green Server-2012-SP0431	5/11/12		828	8	300000073825549
Applied-Sentinel Power-2012-SP0826	6/24/12			8	300000073828314
Axense-Green Server-2012-SP0457	5/11/12		828	8	300000073825731
Axense-Sentinel Power-2012-SP0923	7/15/12			8	300000073828993
Axense-Ultra Power-2012-SP1182	5/11/12			8	300000073831792

- d. Click the **Opportunity Name** for a record in the report.
- e. Verify that a dialog with "Drill to Opportunity Details" appears.
- f. Select **Drill to Opportunity Details**.
- g. Verify that a new browser tab opens and displays the Edit Opportunity page for the selected opportunity:

Edit Opportunity: 360 new IT Plan: Summary

Actions | Save | Save and Close | Cancel

* Name: 360 new IT Plan

Account: 360 Signs Limited

Primary Contact: Elaine Newman

Owner: Fiona Smith

Win Probability (%): 10

Include in Forecast: When matches forecast criteria

Attachments: None

Registration

Registration Status: Unassigned

Primary Partner

Registration Type:

Products

Type	Name	Quantity	Estimated Price	Amount	Currency
Product	Green Server (Blade) 9500	8		417,500.00	USD

- h. Click the "Oracle BI Answers" browser tab to return to the Oracle BI Answers session.
- i. Select another record and Drill to Opportunity Details.
- j. Verify that a new browser tab opens and displays the Edit Opportunity page for the selected opportunity.
- k. **Close** both new "Fusion Applications" browser tabs; that is, the ones opened when you drilled to opportunity details.
- l. **Close** all open Oracle BI Answers browser tabs.

4.10 Scheduling a Report

Goals

- Schedule an existing report to run at a later time
- Review reports that have run

Overview

In this practice, you will first schedule an existing report. You will then wait for the schedule to complete and review the report.

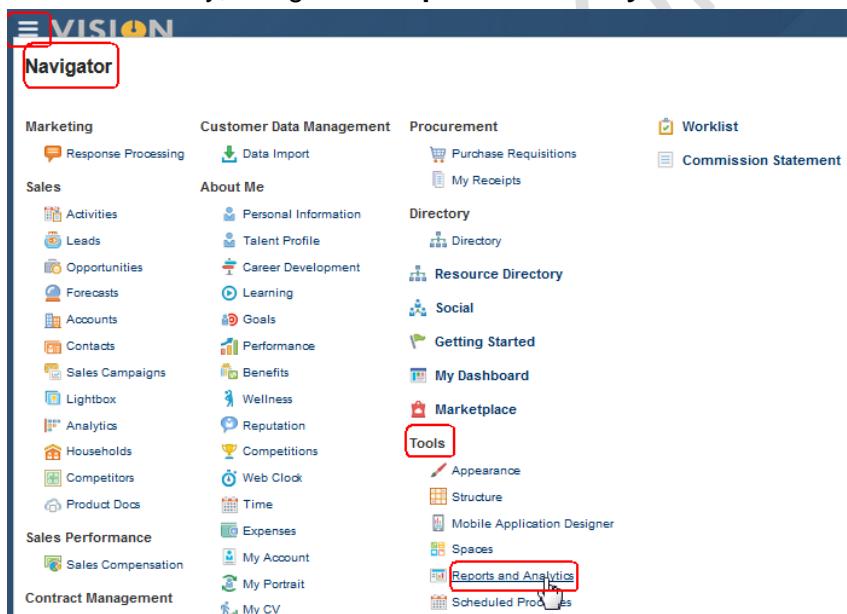
Sign in to the application using **Lisa Jones** login

Assumptions

This is an optional practice because the topic may not be applicable to all projects. If you believe that you understand this content, or it is not relevant at this time please skip this practice. Keep it as a reference for the future.

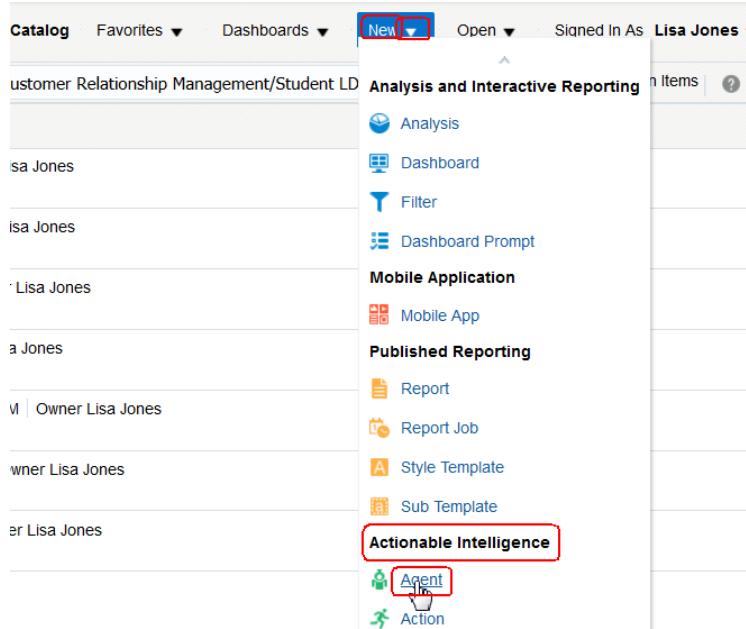
Tasks

1. Navigate to Oracle Business Intelligence.
 - a. If necessary, navigate to **Reports and Analytics**.



- b. In the regional area, click the **Browse Catalog** icon .
2. Invoke the **Oracle BI Agent** to run a report.
 - a. Expand the New drop-down.

- b. Select Agent (under Actionable Intelligence).



3. Configure the agent.

- Verify that the **General** tab is selected.
- Verify that Priority = **Normal**.
- Verify that Run as = **Recipient**.

If you choose to run the report as the report recipient, it will show only the data visible to that recipient. This is the recommended setting. You can also run a report as a specified user and deliver it to a different user. This may be useful when sending subordinates' reports to a manager, for example.

The screenshot shows the 'General' tab selected (highlighted with a red box) in the configuration interface. It includes fields for Priority (radio buttons for High, Normal, and Low, with 'Normal' selected), Run As (radio buttons for Recipient (highlighted with a red box) and Use Agent Owner's Credentials), and impersonation options.

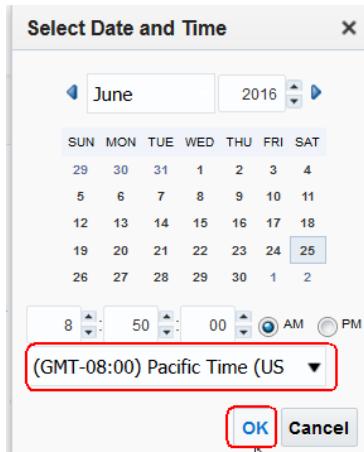
- d. Click the **Schedule** tab.

- e. Set:

Frequency	Once
Start	<Approximately 10 minutes from now>
Re-run Agent Every	<Unchecked>

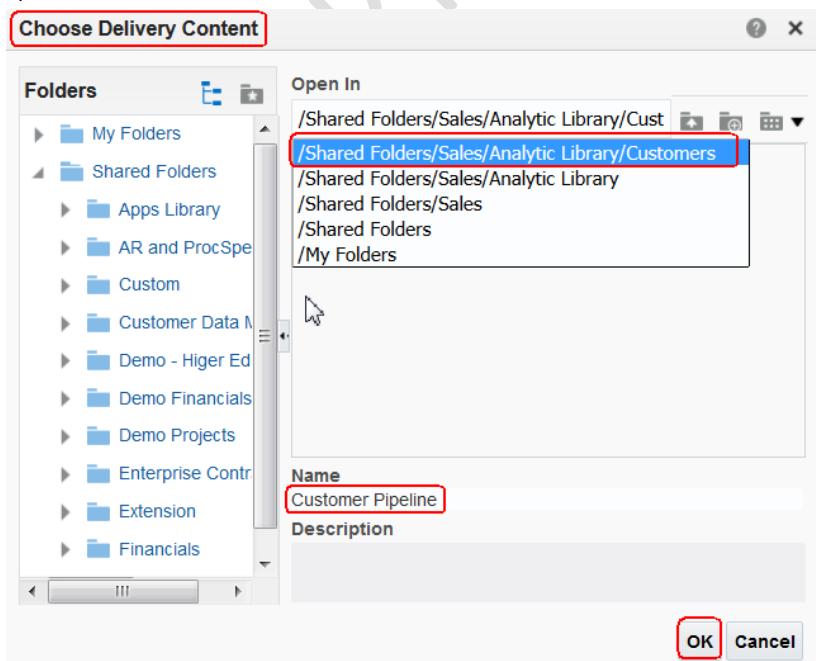
Notice that once you set the frequency to something other than "Never", the Enabled checkbox is enabled and selected. Leave it selected.

Also notice that you can set the time zone to make it easier to tell when the report is going to run:



Be sure to give yourself enough time to complete the rest of the tabs. If 10 minutes is not sufficient, give yourself more time. If it seems excessive, give yourself less time.

- f. Click the **Condition** tab.
- g. Verify that "Do not use a condition" is selected.
You can use a condition to determine whether or not to run a report.
- h. Click the **Delivery Content** tab.
- i. Set Subject = **Scheduled Report nn**, where *nn* is your student initials.
- j. Select the report to run.
 - 1) Click **Browse**.
 - 2) Expand **Shared Folders > Sales > Analytic Library > Customers**.
 - 3) Select **Customer Pipeline**.
 - 4) Click **OK**.



- 5) Notice that you are prompted to adjust the Customer Name parameter.



You can customize report content by adjusting report parameters in the scheduler.

- 6) Leave it at its default ("is prompted") and click **OK**.

- k. Verify that Format = (Device Default).

You may choose from a variety of formats for report delivery.

- I. Click the **Recipients** tab.

- m. Add **Lisa Jones** as a recipient (most likely she has already been added as a recipient).

- 1) Click the Add Recipient icon +
 - 2) Set List = **Users**.
 - 3) Set Name = **Lisa Jones**.
 - 4) Click Search.
 - 5) Select Lisa Jones.
 - 6) Click the right arrow to add her to the Selected Members list.
 - 7) Click **OK**.

- n. Click the **Destinations** tab.

- o. Accept the default destinations.

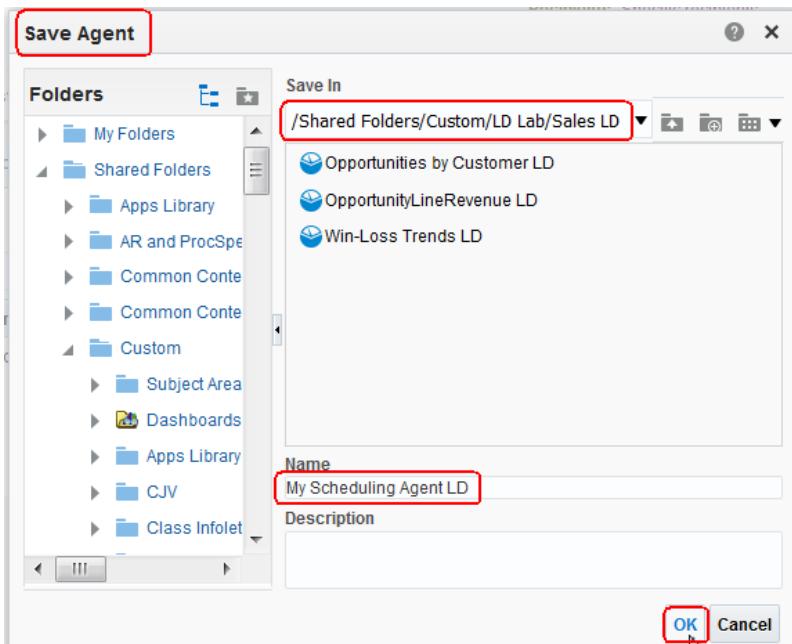
- Home Page and Dashboard delivers the report to the user's home page and dashboard.
- Devices determine to which user devices the report is delivered.

- p. Click the **Actions** tab.

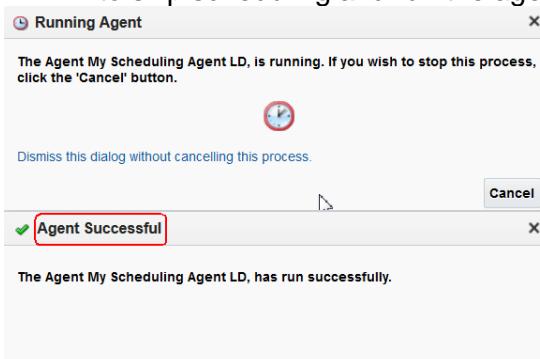
- q. Notice that you can add actions to perform when the agent completes.
- r. In the upper right, click the **Save** icon.

- s. Set Name = **My Scheduling Agent nn**, where *nn* is your student initials.

- t. Click **OK**.

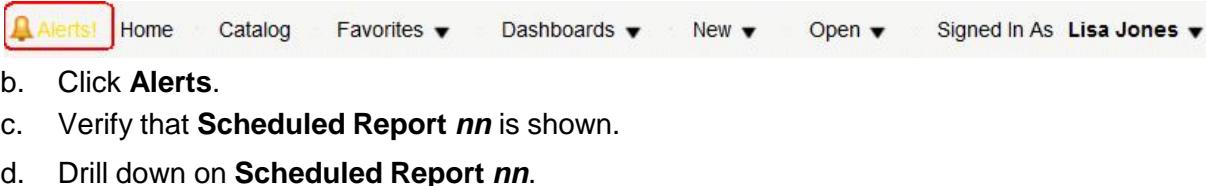


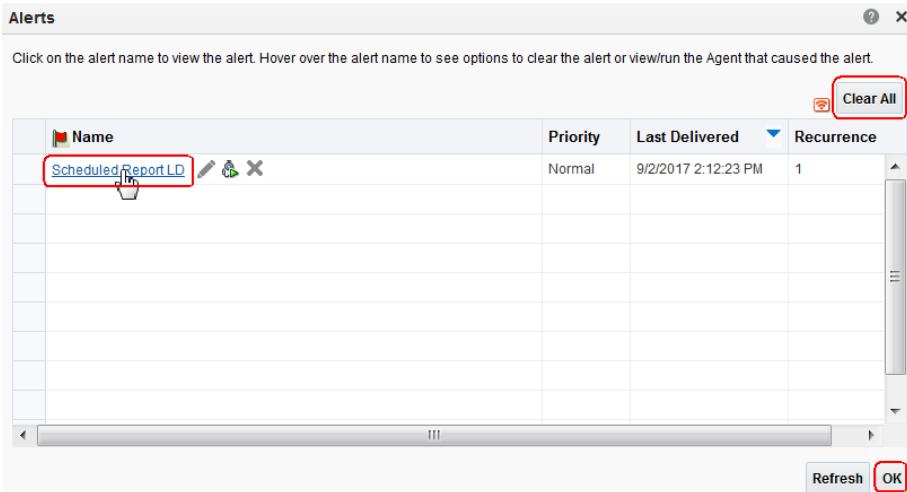
- u. If the time is more than one or two minutes from now, click the Run Agent Now icon  to skip scheduling and run the agent now.



- v. You may receive a warning that does not have a valid e-mail address.
w. Click **OK** to dismiss this warning.

4. Verify the results.
a. Notice that there is a red Alerts link at the top of the page.





- e. Verify that the Customer Pipeline report is displayed.
- f. Click **OK**.
- g. Click **OK or Clear Alert** to dismiss the Alerts pop-up.

The screenshot shows the 'Alert' dialog box for 'Scheduled Report LD'. It displays the following details:

- Scheduled Report LD**
- Priority: Normal
- Delivered: 9/2/2017 2:12:23 PM
- Recurrence: 1
- Source Agent: My Scheduling Agent LD

Below this, the 'Customer Pipeline' report is shown as a table:

Sales Stage Name	Open Opportunity Revenue	# of Open Opportunities
05 - Agreement	6626300	18
07 - Closed		0
06 - Negotiation	6488588	16
04 - Presentation	6915000	9
02 - Discovery	1743000	4
01 - Qualification	4398050	10
03 - Building Vision	5407850	8

At the bottom right of the dialog are 'Clear Alert' and 'OK' buttons, both highlighted with red boxes.

- h. Close the Oracle BI Answers browser tab



4.12 Creating a Cross-Subject Area Report with a Common Dimension

Goals

- Create a cross-subject area report with a common dimension

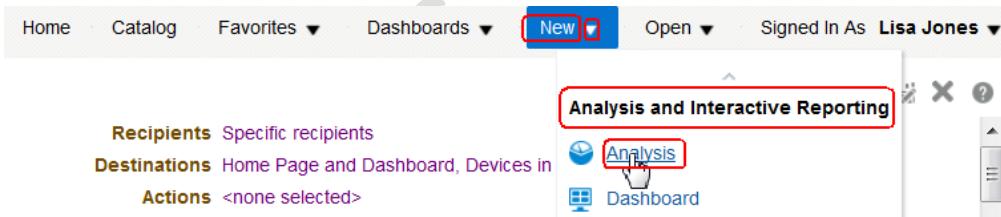
Overview

In this practice you will create a cross-subject area report that uses "Customer" as a common dimension and takes measures from multiple subject areas using that dimension.

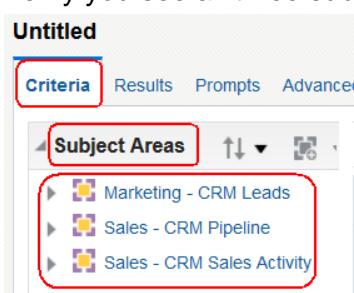
If you must use cross-subject area reports, using common dimensions ensures the measures will be shown at the same granularity level.

Tasks

1. Sign in to the application using **Lisa Jones** login.
2. Start BI Answers.
 - a. Navigate to **Reports and Analytics**.
 - b. In the regional area, click the **Browse Catalog** icon .
3. Create a new analysis using three subject areas.
 - a. Expand the New drop-down and select Analysis.



- b. In the "Select Subject Area" list, select "**Marketing - CRM Leads**".
You may need to scroll down to locate this subject area.
- c. In the regional area, click the Add/Remove Subject Areas icon .
- d. Select "**Sales - CRM Pipeline**" and "**Sales - CRM Sales Activity**".
- e. Click **OK**.
- f. Verify you see all three subject areas listed:



4. Verify that the subject areas all have a common dimension.
 - a. In the regional area, under **Marketing - CRM Leads**, verify that there is a **Customer** folder.

- b. Expand **Customer**.
- c. Verify that " **Name**" is a dimension you can add to your analysis.
- d. Collapse Customer.
These instructions will tell you to collapse folders you will no longer use in order to make navigation easier.
- e. Verify that the "**Customer**" dimension is also contained in the "**Sales - CRM Pipeline**" subject area.
 - 1) Expand **Sales - CRM Pipeline**.
 - 2) Verify that there is a **Customer** folder.
 - 3) Expand **Customer**.
 - 4) Verify that " **Name**" is a dimension you can add to your analysis.
 - 5) Collapse Customer.

-
- f. Verify that the "**Customer**" dimension is contained in the "**Sales - CRM Sales Activity**" subject area.
 - 1) Expand **Sales - CRM Pipeline**.
 - 2) Verify that there is a **Customer** folder.
 - 3) Expand Customer.
 - 4) Verify that " **Name**" is a dimension you can add to your analysis.
 - 5. **Create a cross-subject area report that uses a common dimension.**
 - a. Drag **Customer Name** from **Sales - CRM Sales Activity.Customer** to Selected Columns in the local area.
Since this is a shared dimension, it does not matter from which subject area you take it.
 - b. Collapse **Customer**.
 - c. Add a measure from the **Marketing - CRM Leads** subject area.
 - 1) In the regional area, under **Marketing - CRM Leads**, expand **Lead Facts**.
 - 2) Drag **# of Leads** into the analysis.
 - 3) Collapse **Lead Facts**.
 - 4) Collapse **Marketing - CRM Leads**.
 - d. Add two measures from the **Sales - CRM Pipeline** subject area.
 - 1) In the regional area, under **Sales - CRM Pipeline**, expand **Facts**.
 - 2) Expand **Pipeline Detail Facts**.
 - 3) Drag **# of Opportunity Revenue Lines** into the analysis.
 - 4) Collapse Pipeline Detail Facts.
 - 5) Expand **Pipeline Facts**.
 - 6) Drag **# of Opportunities** into the analysis.
 - 7) Collapse **Pipeline Facts**.
 - 8) Collapse **Facts**.
 - 9) Collapse **Sales - CRM Pipeline**.
 - e. Add a measure from the **Sales - CRM Sales Activity** subject area.
 - 1) In the regional area, under **Sales - CRM Sales Activity**, expand **Facts**.
 - 2) Expand **Activity Facts**.
 - 3) Drag **# of Activities** into the analysis

- 4) Collapse **Activity Facts**.
 - 5) Collapse **Facts**.
 - 6) Collapse **Sales - CRM Sales Activity**.
- f. Verify your analysis.

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reord filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Customer	Lead Facts	Pipeline Detail Facts	Pipeline Facts	Activity Facts
Name	# of Leads	# of Opportunity Revenue Lines	# of Opportunities	# of Activities

- g. Click the **Results** tab.
- h. Verify that the report is successfully generated, and shows number of leads, number of opportunity revenue lines, number of opportunities, and number of activities for each customer:

Compound Layout

Title

Table

Name	# of Leads	# of Opportunity Revenue Lines	# of Opportunities	# of Activities
4G Telecom	0	0	0	6
4M Technologies	0	0	0	53
6 October plast	0	0	0	18
A. C. Networks	0	10	11	44
AB12 Tecnologie	0	0	0	12
ABC Application Software	0	0	0	2
ACME	0	0	0	2
ACUP PROPERTIES LIMITED	0	0	0	12
ADF Energies	0	0	0	31
AOne Electricals LLC	0	0	0	18
ARS Finanziaria	0	0	0	38
ATOC	0	0	0	12
ATW General Trading	0	0	0	18
AZL Deutschland	0	0	0	7

6. Remain signed in to the application for the next practice. You do not need to save this analysis, as you will not be using it again.

4.13 Creating a Cross-Subject Report with a Local Dimension

Goals

- Create a cross-subject area report that includes local dimensions.

Overview

In this practice, you will create an analysis that uses local dimensions (dimensions not shared by all of the subject areas). Because these local dimensions are not shared by all subject areas, facts associated with those dimensions may be repeated in the report.

Assumptions

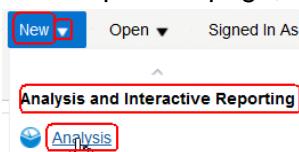
This is an **optional** practice because the topic may not be applicable to all projects. If you believe that you understand this content, or it is not relevant at this time please skip this practice. Keep it as a reference for the future.

Sign in to the application using **Lisa Jones** login.

Tasks

1. Create a new analysis using two subject areas.

- a. At the top of the page, select **New > Analysis**.



- b. In the Select Subject Areas list, select **Sales - CRM Pipeline**.

- c. In the "Are you sure?" dialog, click **Leave Page**.

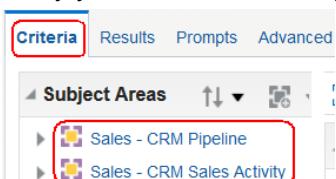
You do not need to save the previous analysis.

- d. In the regional area, click the **Add/Remove Subject Areas** icon.

- e. Select "**Sales - CRM Sales Activity**".

- f. Click **OK**.

- g. Verify you see the two subject areas listed:



2. Add a **common** dimension to the analysis.

- a. In the regional area, under **Sales - CRM Pipeline**, expand **Customer**.

Recall that in the previous practice you determined that Customer Name was a common dimension between these two subject areas.

- b. Drag **Customer Name** into the analysis.

- c. Collapse Customer.

3. Add local dimensions to the analysis.

- a. Verify that **Competitor** is a local dimension for **Sales - CRM Pipeline**.
 - 1) Under Sales - CRM Pipeline verify there is a Competitor folder.
 - 2) Expand **Sales - CRM Sales Activity**.
 - 3) Verify that **there is no Competitor** folder under **Sales - CRM Sales Activity**.
 - b. Under **Sales - CRM Pipeline**, expand **Competitor**.
 - c. Drag **Competitor Name** into the analysis.
 - d. Collapse **Competitor**.
 - e. Verify that **Activity** is a local dimension for **Sales - CRM Activity**.
 - 1) Under Sales - CRM Sales Activity verify there is an Activity folder.
 - 2) Verify that **there is no Activity** folder under **Sales - CRM Pipeline**.
 - f. Under **Sales - CRM Sales Activity**, expand **Activity**.
 - g. Drag **Activity Type** into the analysis.
 - h. Collapse **Activity**.
4. Add measures to the analysis.
- a. Add **Sales - CRM Pipeline** facts.
 - 1) Under Sales - CRM Pipeline expand **Facts**.
 - 2) Expand **Pipeline Detail Facts**.
 - 3) Drag **Opportunity Line Revenue** into the analysis.
 - 4) Collapse **Pipeline Detail Facts**.
 - 5) Collapse **Facts**.
 - 6) Collapse **Sales - CRM Pipeline**.
 - b. Add **Sales - CRM Sales Activity** facts.
 - 1) Under Sales - CRM Sales Activity expand **Facts**.
 - 2) Expand **Activity Facts**.
 - 3) Drag **# of Activities** into the analysis.
 - 4) Collapse **Activity Facts**.
 - 5) Collapse **Facts**.
 - 6) Collapse **Sales - CRM Sales Activity**.
 - c. Verify your analysis:

Selected Columns

Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to change their order, apply properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.

Customer	Competitor	Activity	Pipeline Detail Facts	Activity Facts
[Name]	[Name]	[Activity Type]	[Opportunity Line Revenue]	[# of Activities]

5. Enable local dimensions.
- a. Click the **Advanced** tab.
 - b. Under "Advanced SQL Clauses", select the "**Show Total value for all measures on unrelated dimensions**" checkbox.

Criteria Results Prompts **Advanced**

Advanced SQL Clauses

Use the following fields to include additional clauses in the SQL code for this analysis and to change the behavior of the analysis.

Important: You cannot use the fields in this section, except for the Prefix field, if the analysis is running in a local dimension.

DISTINCT	<input type="checkbox"/> Issue an explicit Distinct
DIMENSIONALITY	<input checked="" type="checkbox"/> Show Total value for all measures on unrelated dimensions
FROM	Enter the name of the Subject Area

- c. At the bottom of the Advanced SQL Clauses section, click the **Apply SQL** button

Apply SQL

- d. Click **OK** to dismiss the warning.

6. Test the results.

- a. Click the **Results** tab.
 b. Notice that some lines are repeated; for example, Opportunity Line Revenue for A. C. Networks on the image on which this practice was developed.

Repeated data is not uncommon when using local dimensions.

Compound Layout

Name	Opportunity Line Revenue	# of Activities	Name	Activity Type
A. C. Networks				
	1100000	16		Meeting
	1100000	22	Apalachee Professional Services	Call
	1100000	1		Demo
	1100000	2		E-mail
	1100000	1		Event
	1100000	9		Meeting
	1100000	16		To do
	518960	22	Noyce Corp.	Call
	518960	1		Demo
	518960	2		E-mail
	518960	1		Event
	518960	9		Meeting
	518960	16		To do

7. Remain signed in to the application for the next practice.

4.14 Using Set Operations to Combine Result Sets

Goals

- Create an analysis that combines two (or more) result sets

Overview

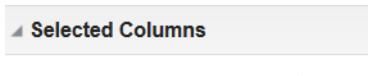
In this practice, you will explore using the Union operation to combine two result sets in a single report.

Assumptions

This is an **optional** practice because the topic may not be applicable to all projects. If you believe that you understand this content, or it is not relevant at this time please skip this practice. Keep it as a reference for the future.

Tasks

1. Create a new analysis.
 - a. At the top of the page, select **New > Analysis**.
 - b. In the **Select Subject Areas** list, select **Marketing - CRM Campaign Performance**.
 - c. In the "Are you sure?" dialog, click **Leave Page**.
You do not need to save the previous analysis.
 - d. In the regional area, expand **Marketing Source**.
 - e. Drag **Campaign (Name)** to the analysis.
 - f. Collapse Marketing Source.
 - g. Expand **Facts**.
 - h. Expand **Response Facts**.
 - i. Drag **# Responses** to the analysis.
 - j. Collapse Response Facts.
 - k. Collapse Facts.
 - l. Verify your analysis.



2. Examine the results.
 - a. Click the **Results** tab.

- b. Verify that you receive the expected report:

Compound Layout	
Title	
Table	
Campaign	# Responses
Big Bang Event at Pinnacle Technologies	16
Green Server Promotional Event	10
New Product Line Announcement	5
	77

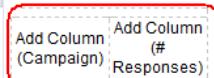
3. Add a union.

- a. Click the **Criteria** tab.
- b. In the local area, in the **Selected Columns** section, click the "Combine results based on union, intersection, and difference operations icon.

The screenshot shows the 'Selected Columns' pane. At the top, there's a toolbar with various icons. One specific icon, which looks like two overlapping circles, is highlighted with a red box. Below the toolbar, there's a message: 'Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.' Underneath, there are two columns: 'Marketing Source' and 'Response Facts'. Each column has a gear icon next to it. At the bottom right of the pane, there's an 'Edit' button.

- c. In the **Select Subject Area** list, select **Sales - CRM Sales Activity**.
- d. In the **Result Columns** section, mouse over the **Union/Intersection/Difference** icon and verify that you are using a **union**.

The screenshot shows the 'Set Operations' section. It has a message: 'Combine criteria from one or more subject areas. Click on the all criteria and Result Columns.' Below this, there's a 'Result Columns' section. It contains two items: 'Criteria ("Marketing - CRM Campaign Performance")' and 'Criteria ("Sales - CRM Sales Activity")'. The second item is highlighted with a red box. At the bottom right of the section, there's an 'Edit' button. Below the 'Result Columns' section, there's another message: 'Double click on column names in the Subject Areas pane to add them to the analysis. Once added, drag-and-drop columns to reorder them. Edit a column's properties, formula and filters, apply sorting, or delete by clicking or hovering over the button next to its name.'



- e. Notice that you are expected to add **two columns**: One to be listed under "**Campaign Name**" and one to be listed under "**# of Responses**".
- f. In the regional area, under **Sales - CRM Sales Activity**, expand **Activity**.
- g. Drag **Activity Type** onto the **Campaign** name column.
- h. Collapse Activity.
- i. Expand **Facts**.
- j. Expand **Activity Facts**.
- k. Drag **# of Activities** onto the **# of Reponses** column.

I. Verify your criteria:

The screenshot shows the 'Selected Columns' section of the Oracle BI Set Operations interface. It includes a 'Set Operations' header with instructions to combine criteria from subject areas. Below is a 'Result Columns' pane containing two items: 'Criteria ("Marketing - CRM Campaign Performance")' and 'Criteria ("Sales - CRM Sales Activity")'. A red box highlights the second item. At the bottom, there are four buttons: 'Activity', 'Activity Facts', 'Activity Type', and '# of Activities'. The 'Activity Type' and '# of Activities' buttons are also highlighted with red boxes.

4. Examine the results.

- Click the **Results** tab.
- Verify that activity types and numbers of such activities are added to the report:

The screenshot shows the 'Results' tab of the Oracle BI interface. The 'Subject Areas' pane contains a note about result columns being returned when multiple criteria are combined. The 'Catalog' pane shows 'All' selected. The main area displays a 'Compound Layout' with a table titled 'Campaign' showing '# Responses' for various activity types. Red boxes highlight the note in the Subject Areas pane and the '# Responses' column of the table.

Campaign	# Responses
Big Bang Event at Pinnacle Technologies	16
Call	9367
Chat	1002
Demo	4532
E-mail	770
Event	744
FYI	31
Fax	1
Internal	1619
Meeting	9186
New Product Line Announcement	5
Seasonal Promotion Event	10
To do	76
WEB CONFERENCE	2

c. Examine the **SQL**.

- Click the **Advanced** tab.
- Examine the "SQL Issued" section and verify that it is indeed a UNION.

The screenshot shows the 'Advanced' tab of the Oracle BI interface. The 'SQL Issued' section contains the following SQL code:

```

SELECT saw_0, saw_1 FROM ((SELECT "Marketing Source"."Campaign Name" saw_0,
"Response Facts"."# Responses" saw_1 FROM "Marketing - CRM Campaign Performance"
UNION (SELECT "Activity"."Activity Type" saw_0, "Activity Facts"."# of
Activities" saw_1 FROM "Sales - CRM Sales Activity")) t1 ORDER BY saw_0

```

A red box highlights the 'UNION' keyword.

5. Sign out of the application.

Oracle Corporation
World Headquarters
500 Oracle Parkway
Redwood Shores, CA 94065
USA

Worldwide inquiries:
Phone: +1 650 506 7000
Fax: +1 650 506 7200

www.oracle.com

Oracle is the information company

Oracle is a registered trademark of Oracle Corporation.
Various product and service names referenced herein may be trademarks of Oracle Corporation. All other product and service names mentioned may be trademarks of their respective owners.

Copyright © 2018 Oracle Corporation

All rights reserved.

