Oracle OTBI

Hands-on Workshop

Student's Lab Book 1

Labs Contribution

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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 and 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

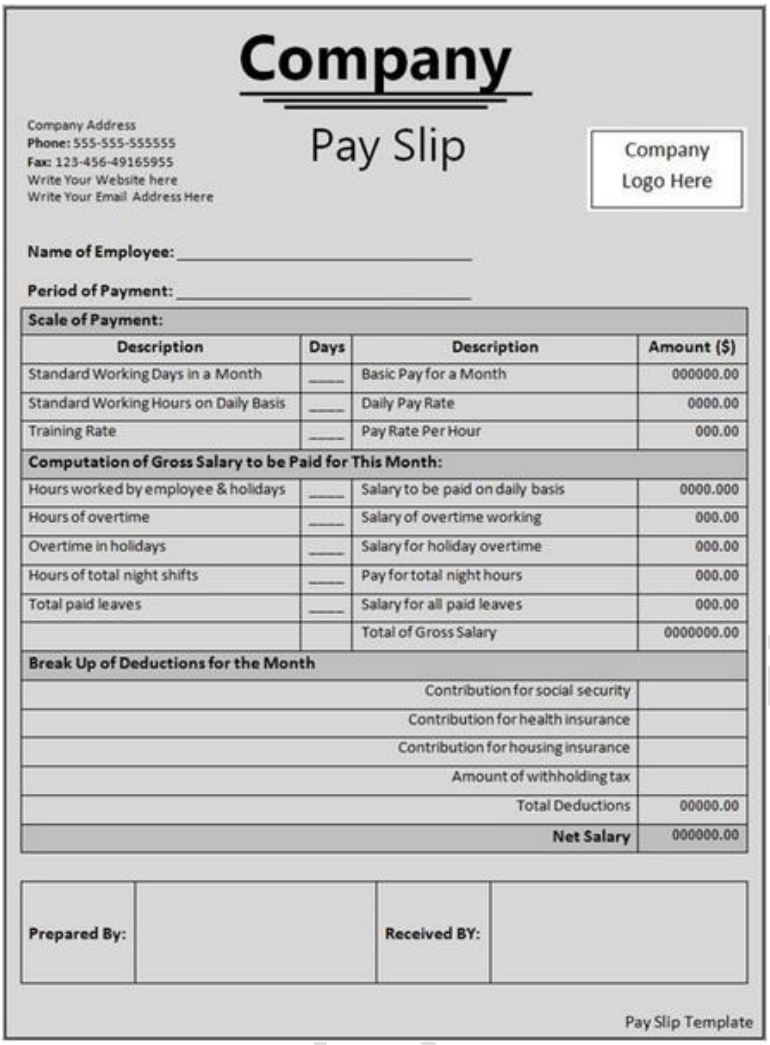
One advantage of BI Publisher reports over OBI EE Answers is that you can print BI Publisher reports on standard templates, also known as fixed format sheets.

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

Company Address
Phone: 555-555-555555
Fax: 123-456-49165955
Write Your Website here
Write Your Email Address Here

Pay Slip

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	0000.000
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:**	

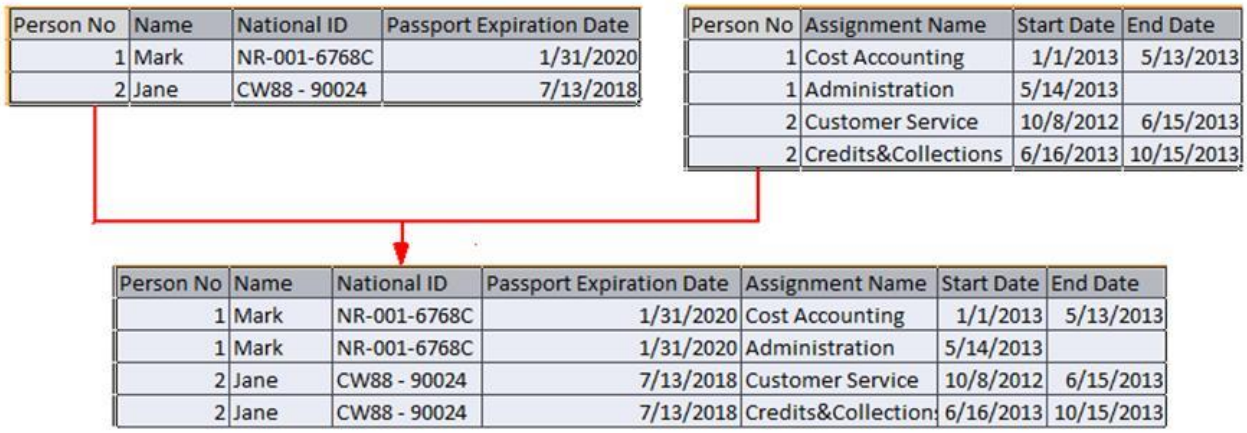
Pay Slip Template

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.



Person No	Name	National ID	Passport Expiration Date
1	Mark	NR-001-6768C	1/31/2020
2	Jane	CW88 - 90024	7/13/2018

Person No	Assignment Name	Start Date	End Date
1	Cost Accounting	1/1/2013	5/13/2013
1	Administration	5/14/2013	
2	Customer Service	10/8/2012	6/15/2013
2	Credits&Collections	6/16/2013	10/15/2013

Person No	Name	National ID	Passport Expiration Date	Assignment Name	Start Date	End Date
1	Mark	NR-001-6768C	1/31/2020	Cost Accounting	1/1/2013	5/13/2013
1	Mark	NR-001-6768C	1/31/2020	Administration	5/14/2013	
2	Jane	CW88 - 90024	7/13/2018	Customer Service	10/8/2012	6/15/2013
2	Jane	CW88 - 90024	7/13/2018	Credits&Collection	6/16/2013	10/15/2013

Report Bursting

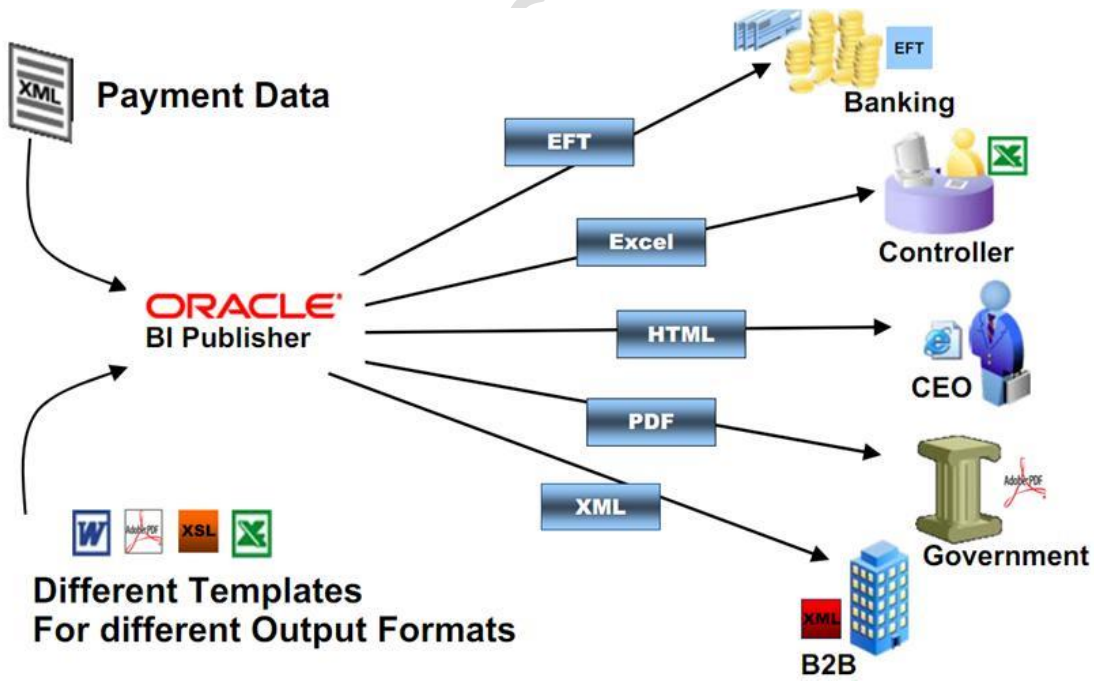
Report bursting enables you to separate a single report with personalized content to multiple output formats and destinations on a scheduled basis.

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**

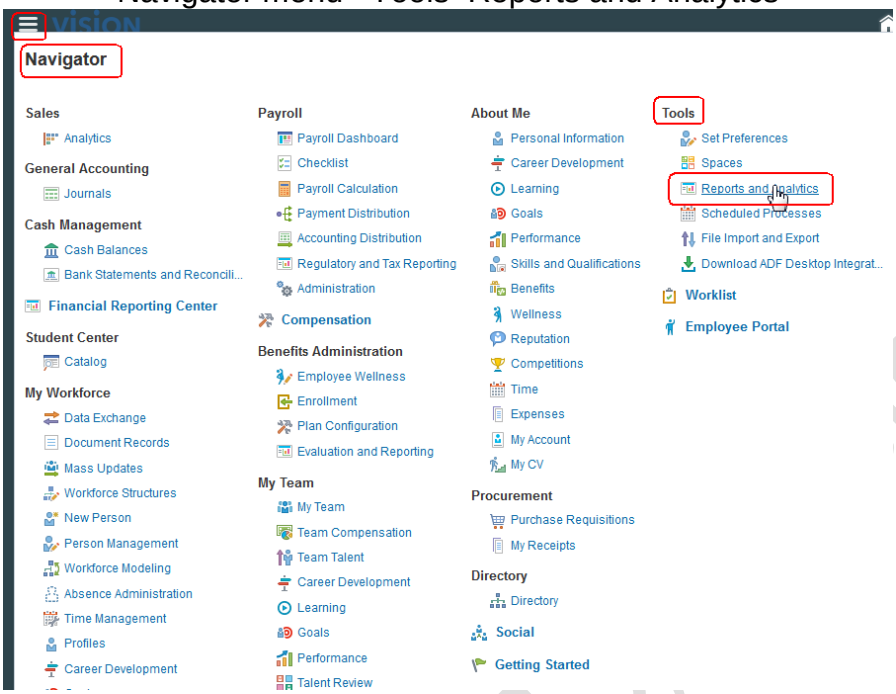
This figure illustrates the same report created in BI Publisher, with the grand total calculated.

				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**

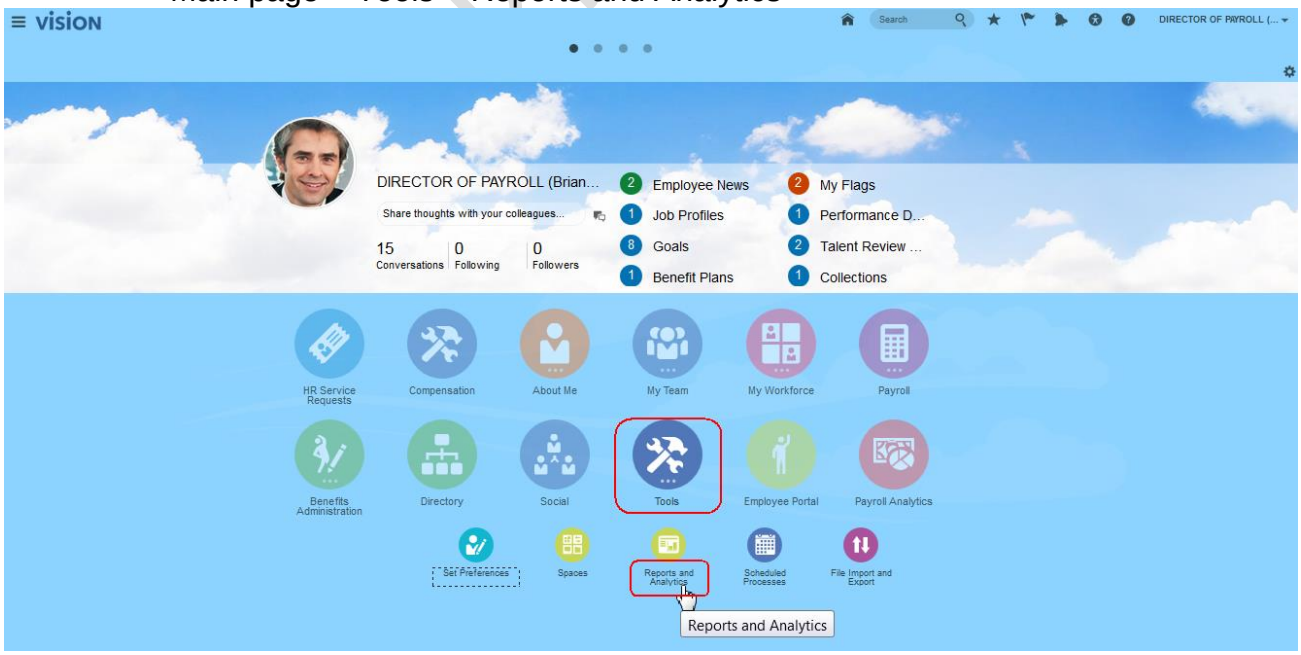
Reports and Analytics Navigation

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:

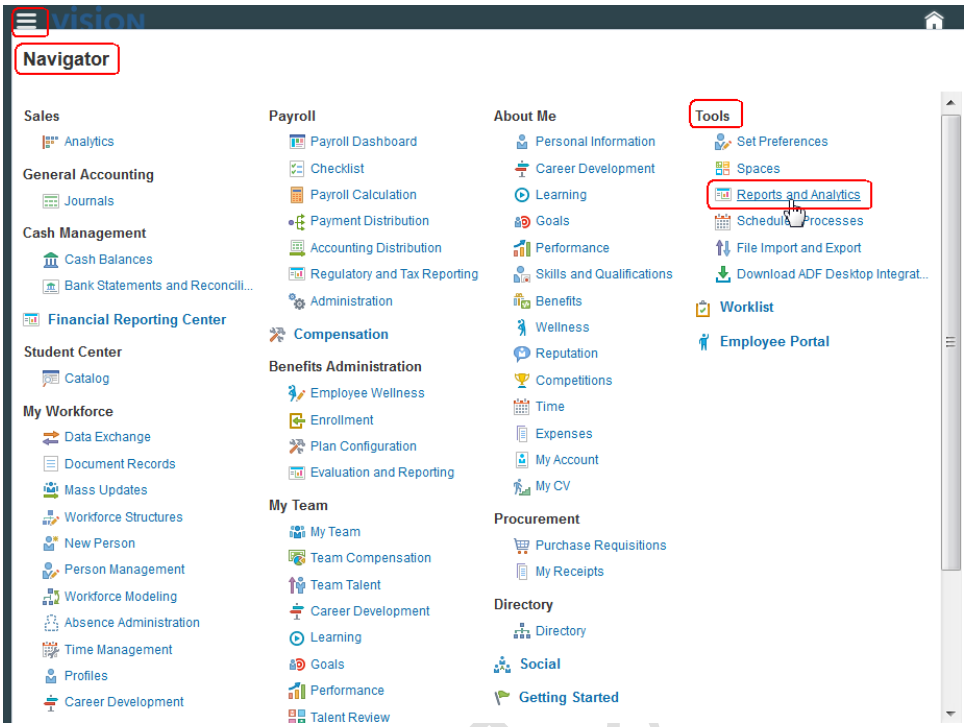
- You might see the same report or analysis in different work areas.
- You can have multiple instances of the same report or analysis in one work area, but with different parameters.

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**

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

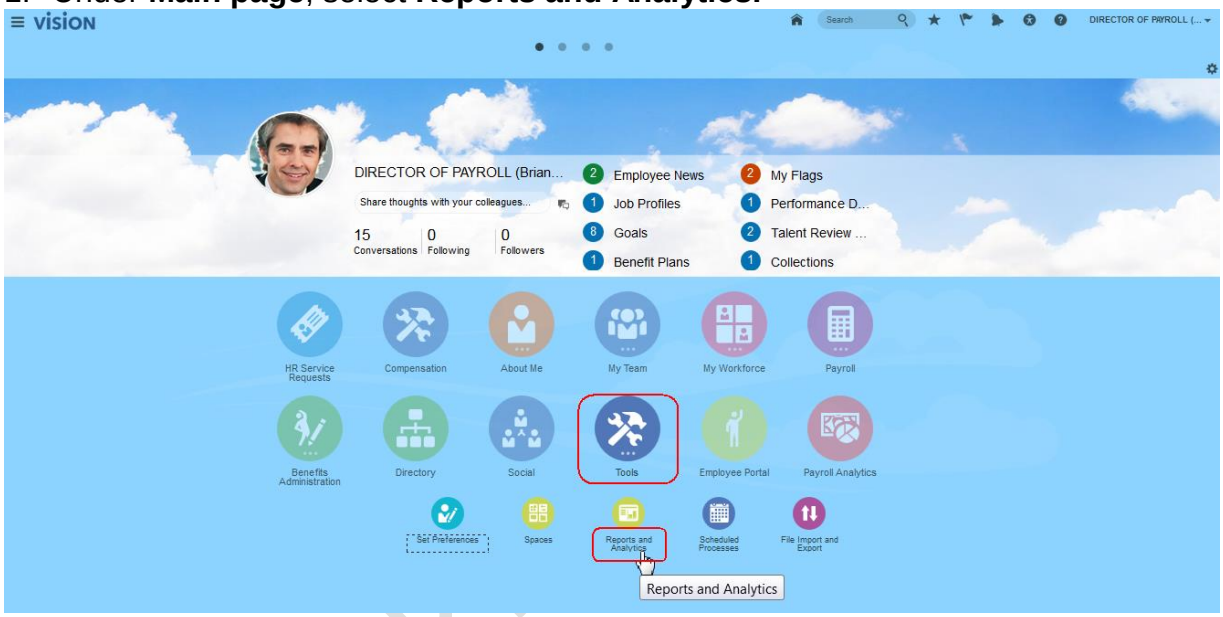
information: User: **Brian.Joseph**

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

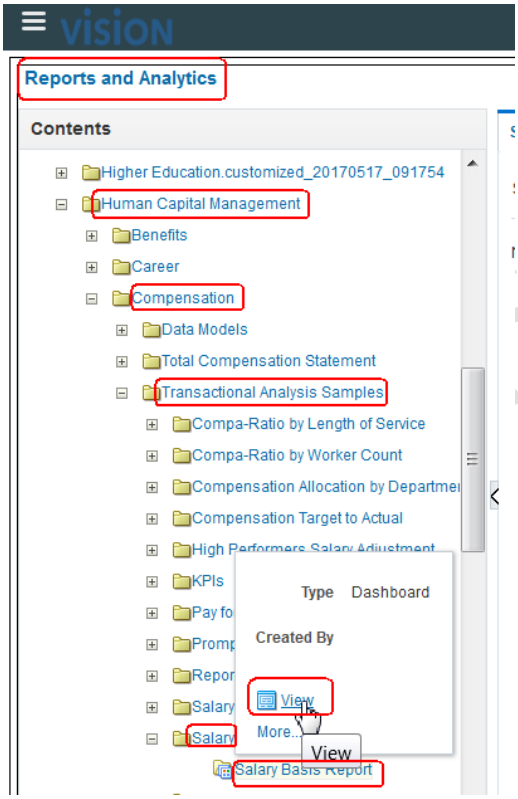
Background
As an HR specialist, you want to review the Salary Basis report.

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.

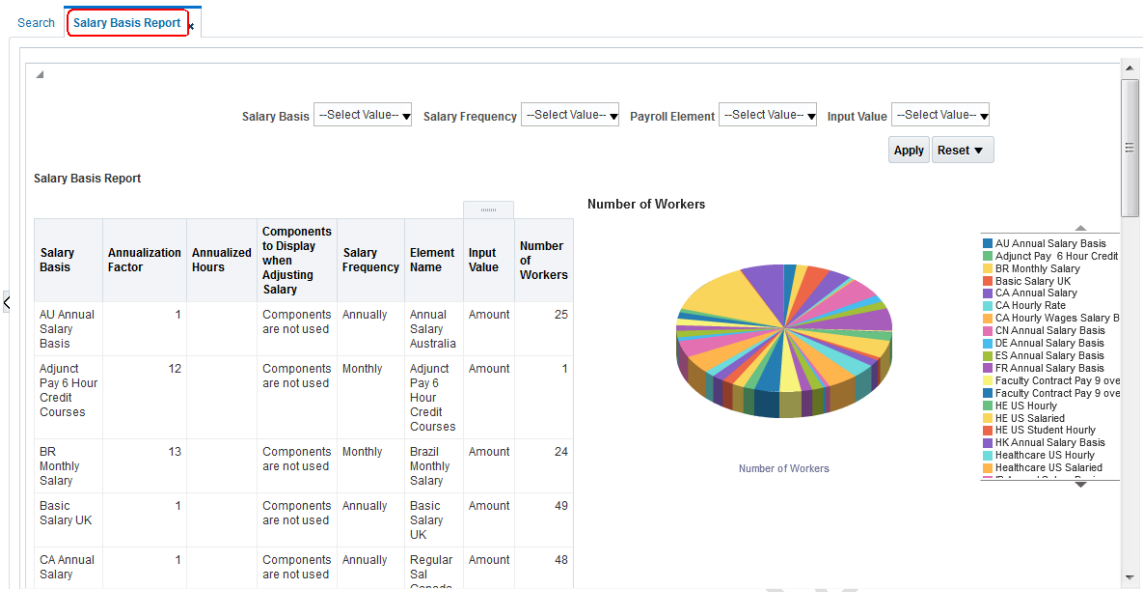
Activity Scope
Sign in as **Brian.Joseph.** Access the **Reports and Analytics** pane from the **Navigator** menu and locate the **Salary Basis** report in the **Transactional Analysis Samples** folder under **Compensation**.

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).



Salary Basis	Annualization Factor	Annualized Hours	Components to Display when Adjusting Salary	Salary Frequency	Element Name	Input Value	Number of Workers
AU Annual Salary Basis	1		Components are not used	Annually	Annual Salary Australia	Amount	25
Adjunct Pay 6 Hour Credit Courses	12		Components are not used	Monthly	Adjunct Pay 6 Hour Credit Courses	Amount	1
BR Monthly Salary	13		Components are not used	Monthly	Brazil Monthly Salary	Amount	24
Basic Salary UK	1		Components are not used	Annually	Basic Salary UK	Amount	49
CA Annual Salary	1		Components are not used	Annually	Regular Sal	Amount	48

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.

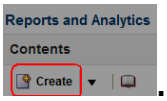
Activity Scope
Sign on as **Brian.Joseph**

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**

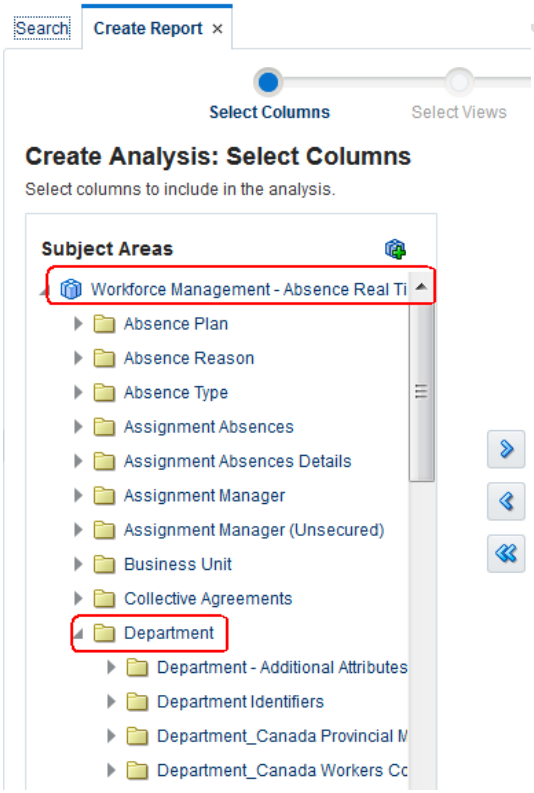
Start Here
Reports and Analytics work area

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.

   Location: **Create Analysis: Select Columns** page
4. Expand the **Department** folder.

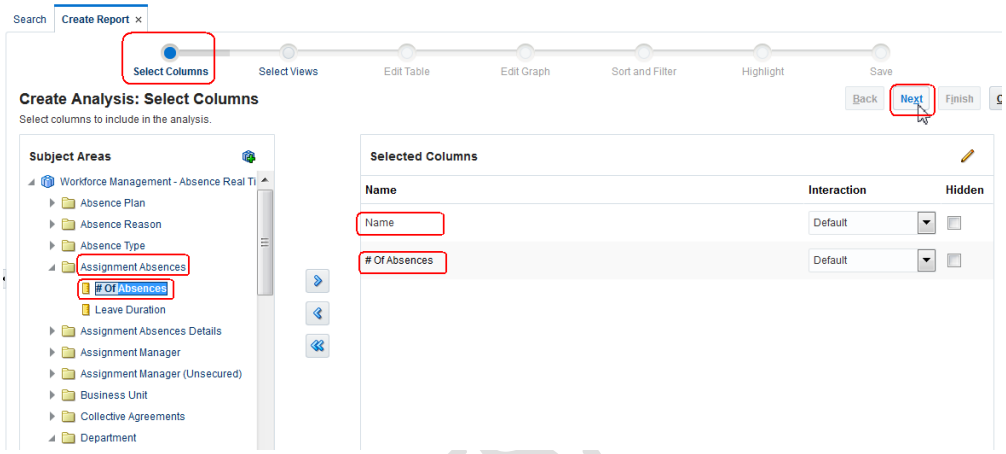


5. Scroll down towards the bottom of the Department folder, select **Name**, and click the **Add** icon button to move the column to the **Selected Columns** area.

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**.



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)**.

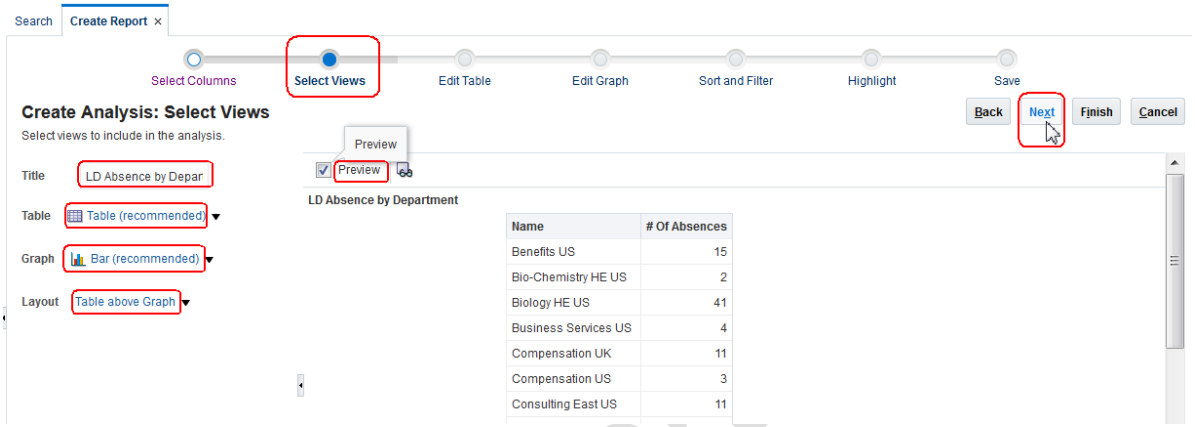
12. Next to the **Graph** field, click **None** to open the **Graph** menu.

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**.



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.

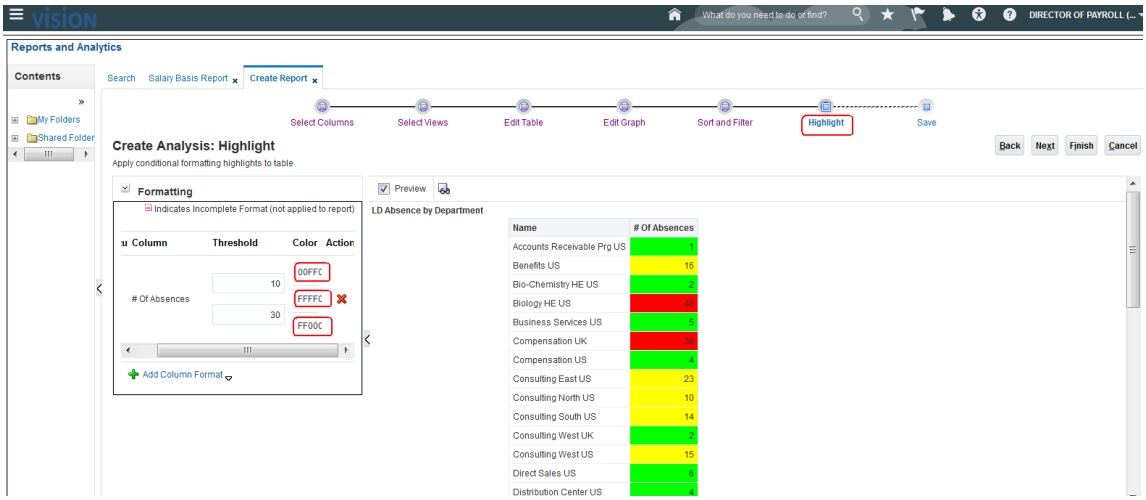
21. Select # **Of Absences**.

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.

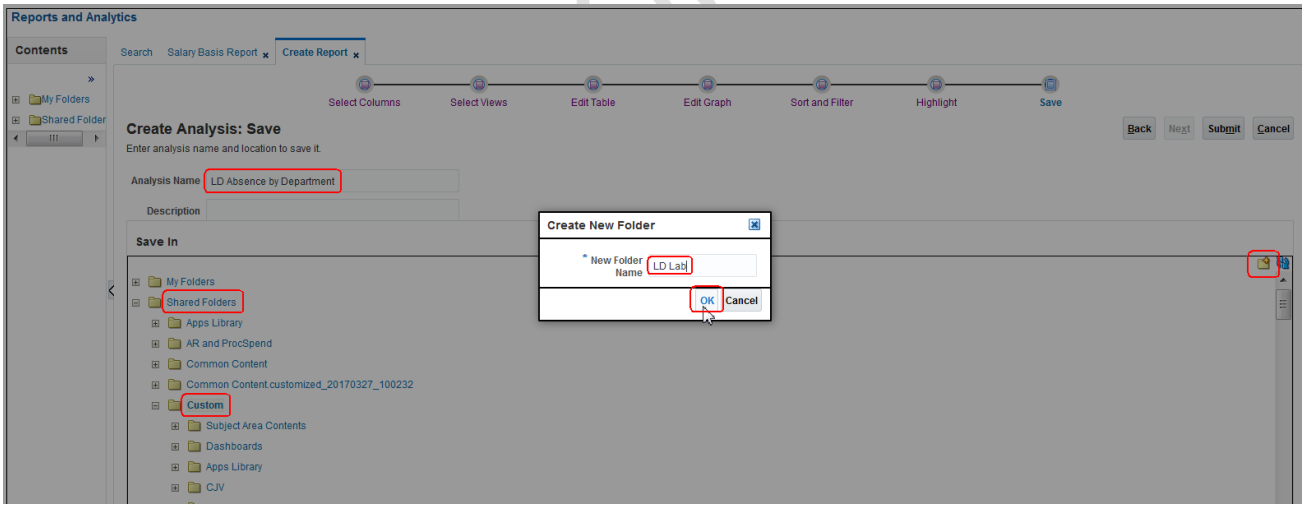
23. In the second **Threshold** field, enter **30,** and click the **down arrow** in the third **Color** field. Select the color FF0000 (**Red)** (leave the second color yellow).

24. Click **Next**.



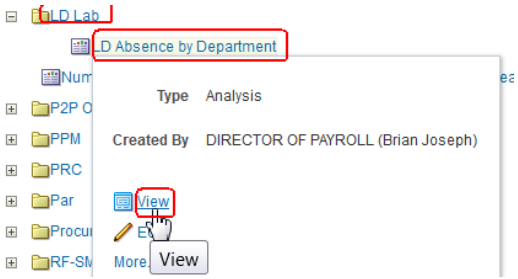
25. Enter **<XX> Absence by Department** in the **Analysis Name** field, enter a description, and then select **Create New Folder <XX> Lab** in **Shared Folders > Custom**.

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.

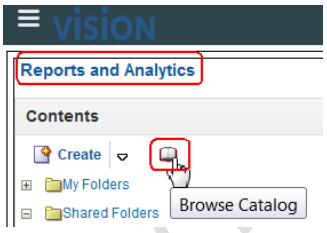
Requirements
You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

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**.

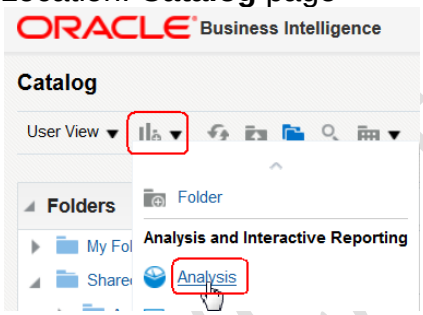
Start Here:
Reports and Analytics work area

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

to open **BI Catalog**.

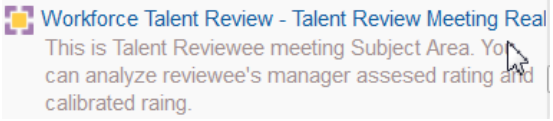
2. Click the **New** icon button and select **Analysis**.

   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.**

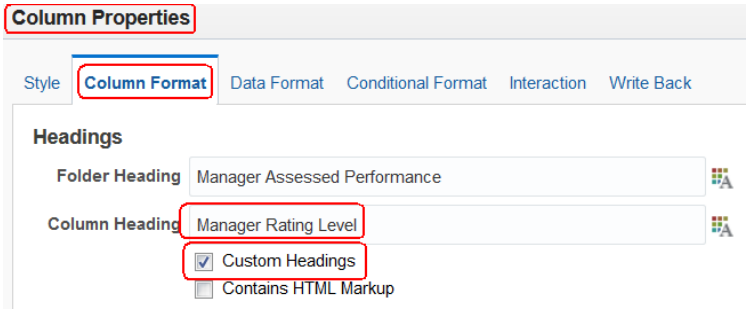
13. Select the **Column Format** tab.

    Location: **Column Properties** window.

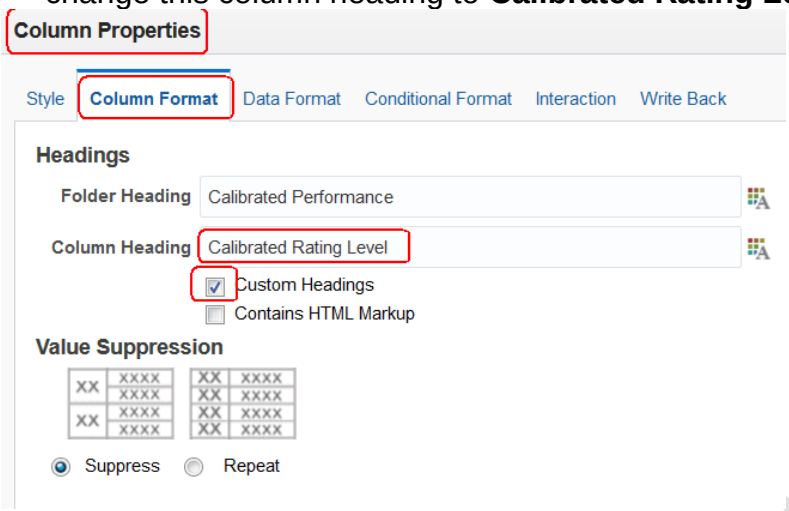
14. Select the **Custom Headings** option.

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.**



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

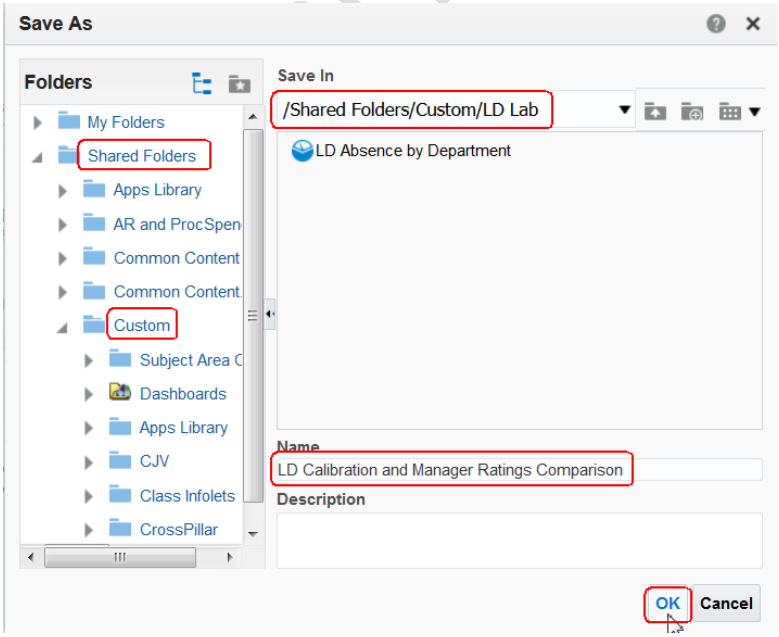
    Location: **Criteria** tab, **Selected Columns** region

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

    Location: **Save As** window

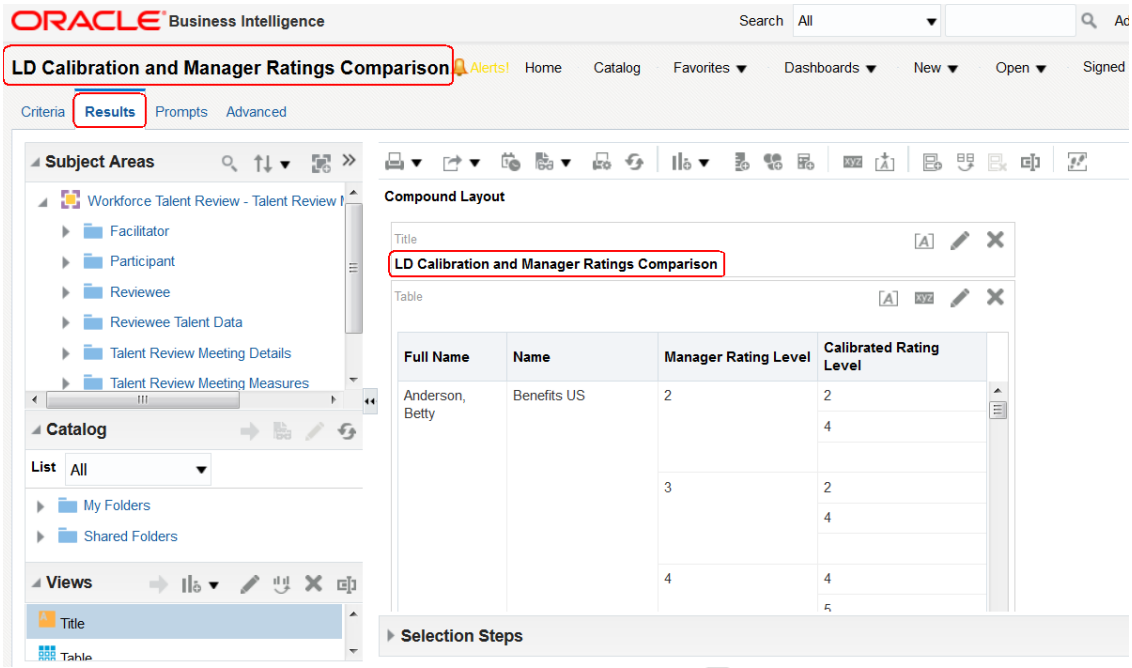
20. Enter **<XX >Calibration and Manager Ratings Comparison** in the **Name** field.

21. Click **OK**.



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

Location: **Criteria** tab



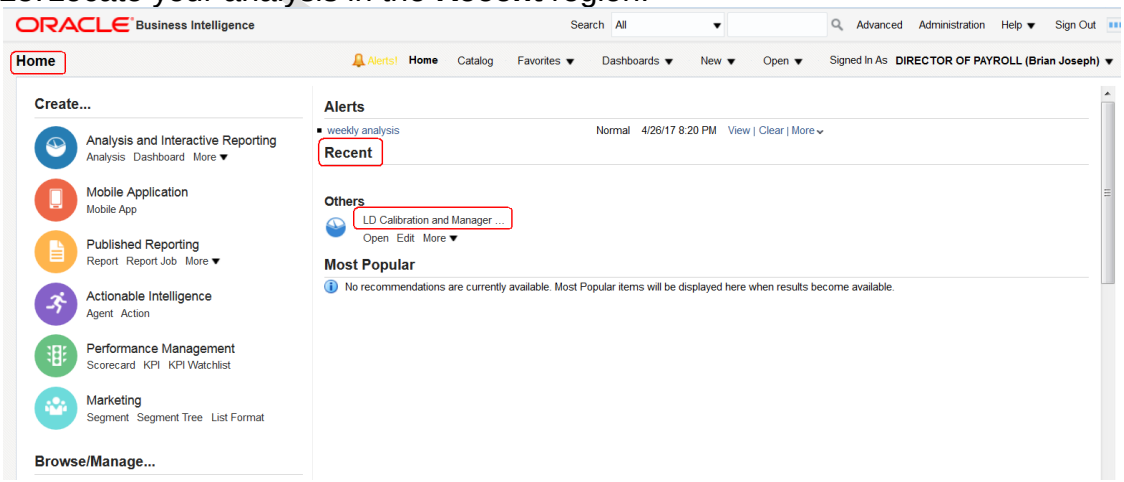
23. Click the **Save Analysis** icon button.

Location: **Results** tab

24. Click **Home** 

. The home page for OBIEE appears.

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



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

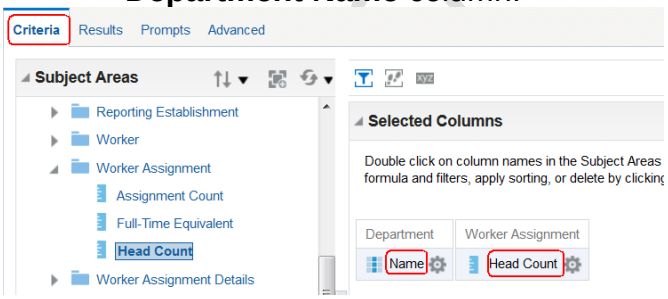
4. Expand the **Department** folder.

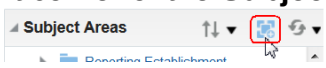
   Location: **Criteria** tab, **Subject Area** region

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.



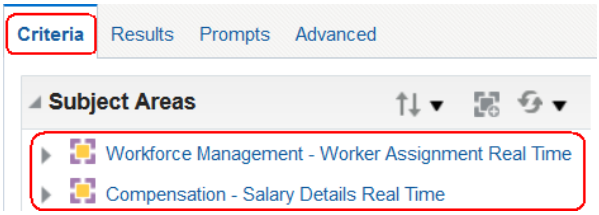
8. In the upper-right corner of the **Subject Areas** region, click the **Add/Remove Subject Areas** 

button.

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

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

10. Click **OK.**

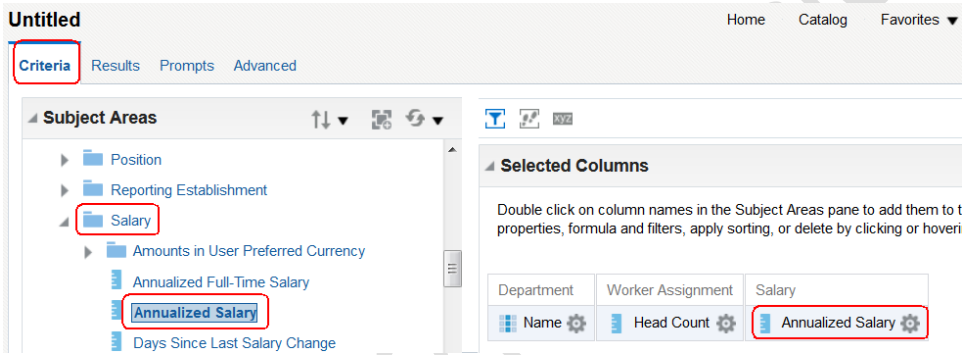


11. Expand the **Compensation - Salary Details Real Time** folder.

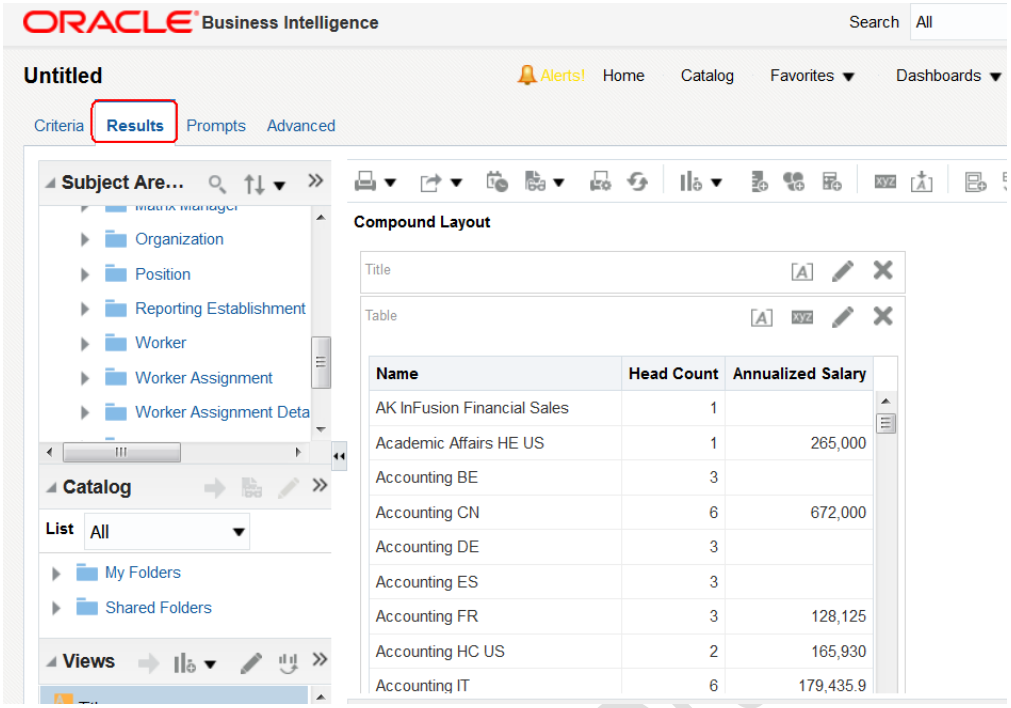
    Location: **Criteria** tab, **Subject Areas** region

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.



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

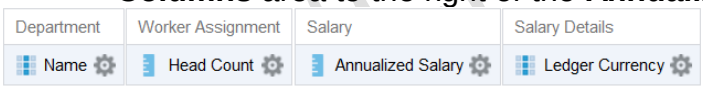


15. Click the **Criteria** tab again to return to the analysis definition.

16. In the **Compensation - Salary Details Real Time,** expand the **Salary Details** folder.

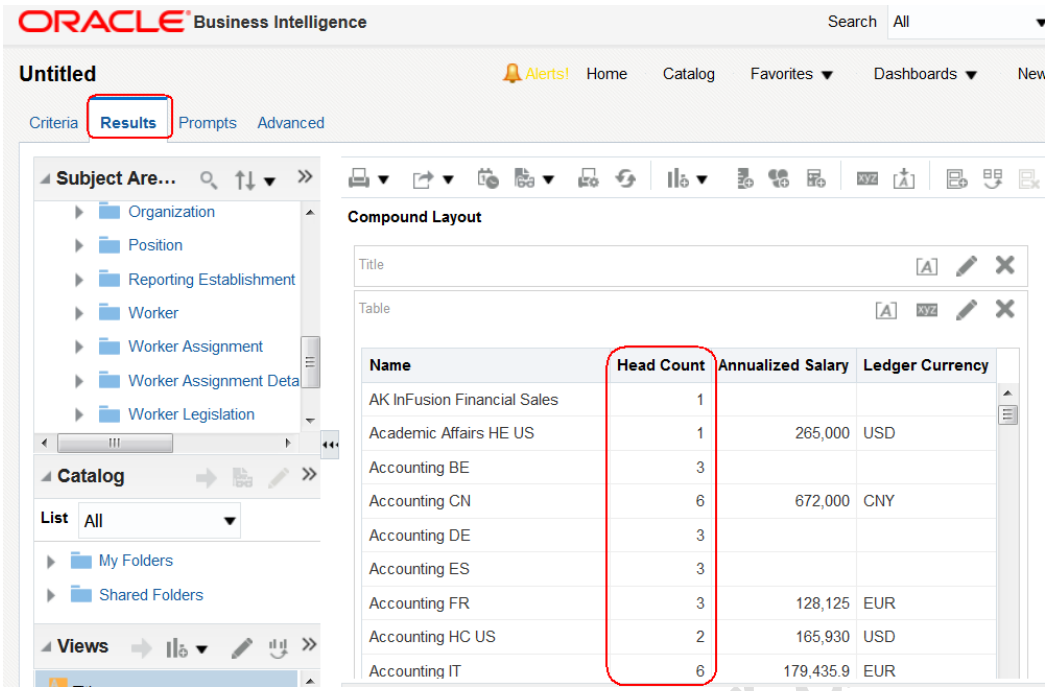
    Location: **Criteria** tab, **Subject Areas** region

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.



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).

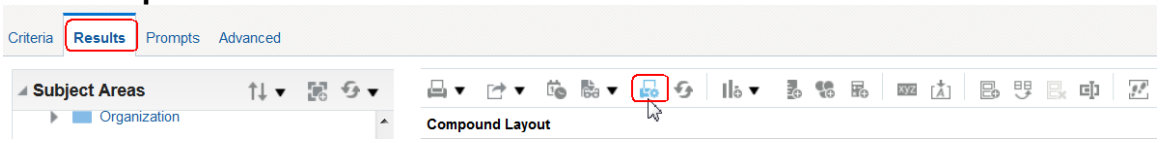


In release 10 there are additional steps necessary to have Head Count numbers. **This steps are not necessary in the current release (R13)**, but we keep it here for your info:

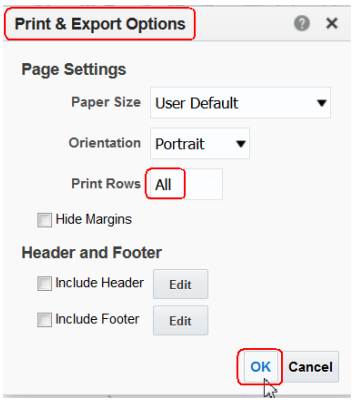
Click the **Advanced** tab.

- 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).

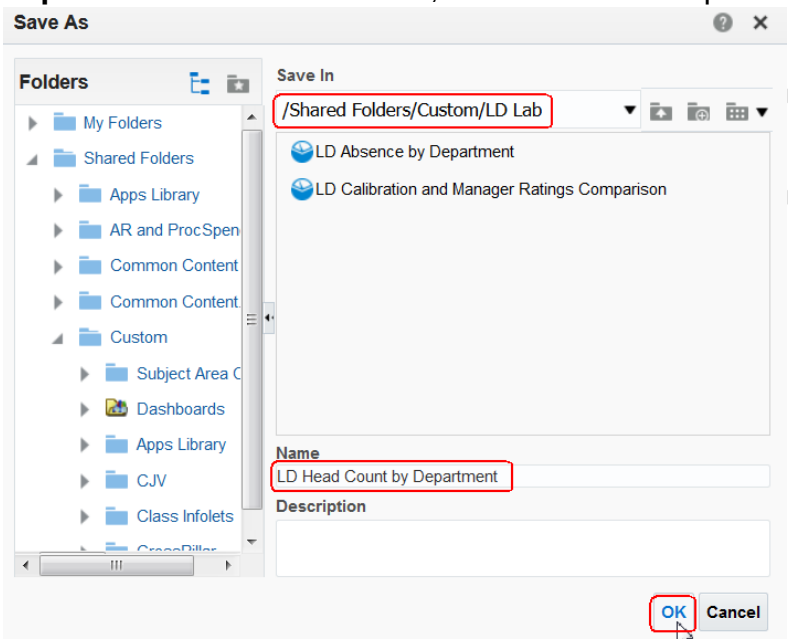
19. Click the **Print and Export Options** button. This is the **Print and Export Options** button:



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**.

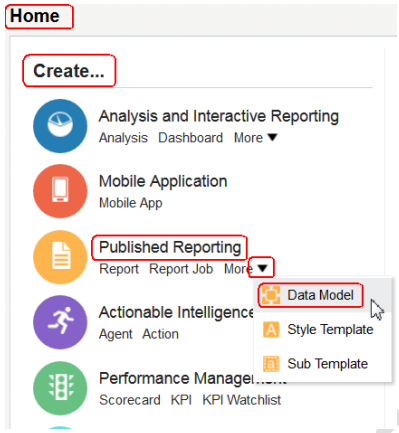
Creating a Data Model

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**.

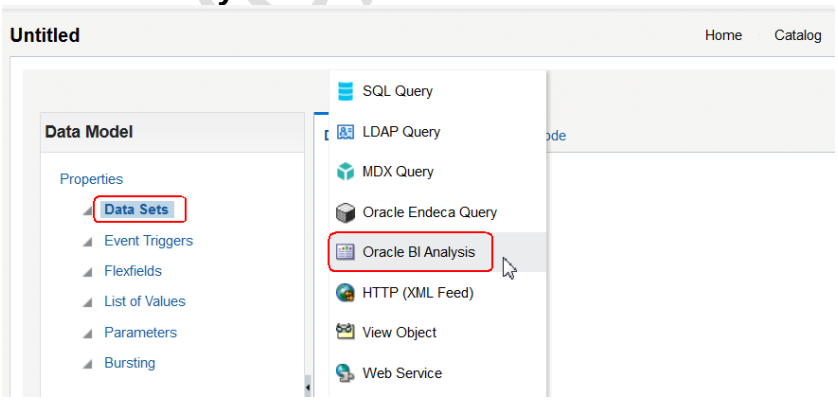
Start Here:
Reports and Analytics work area

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**.



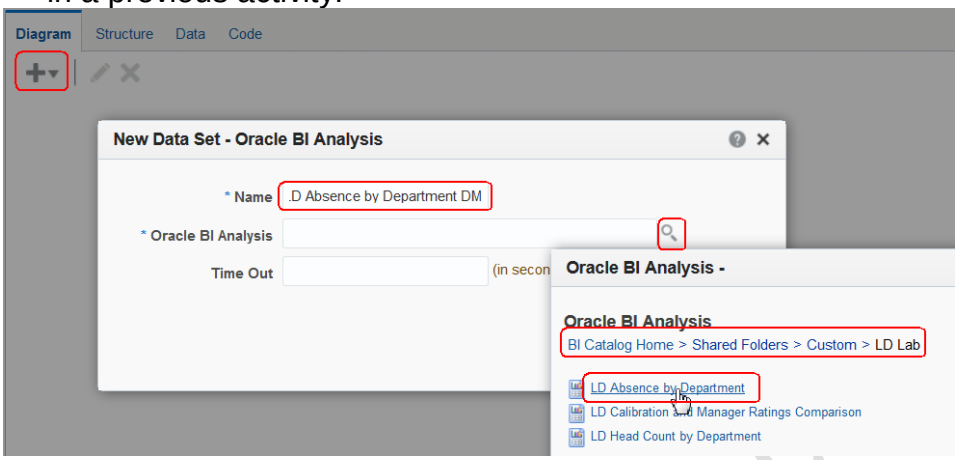
4. In the **New Data Set - Oracle BI Analysis** window, enter **<XX> Absence by Department DM**.

5. In the **Oracle BI Analysis** field, click the **Search** button.

6. In the **Oracle BI Catalog** window, click the **Users** link.

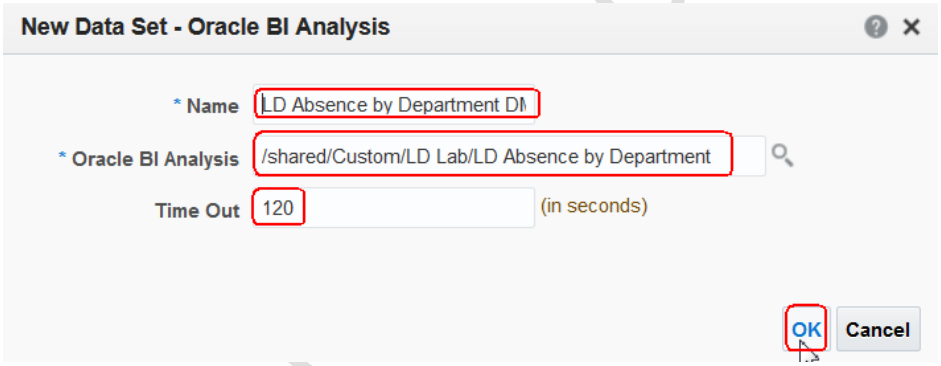
7. Click the **Brian.Joseph** link.

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**.

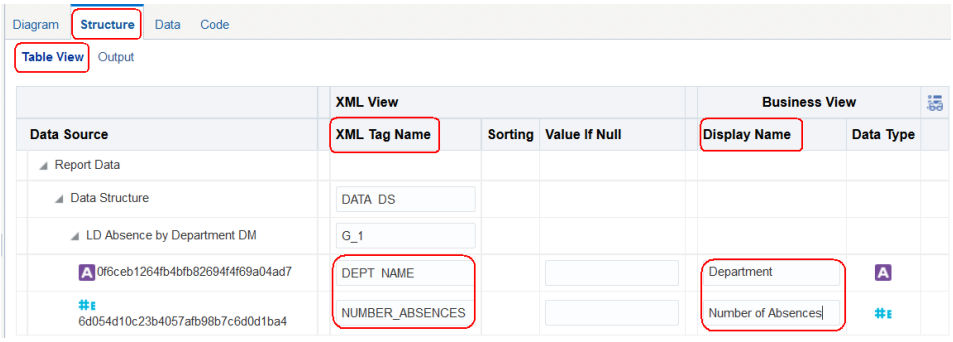


11. Click the **Structure** tab 

.

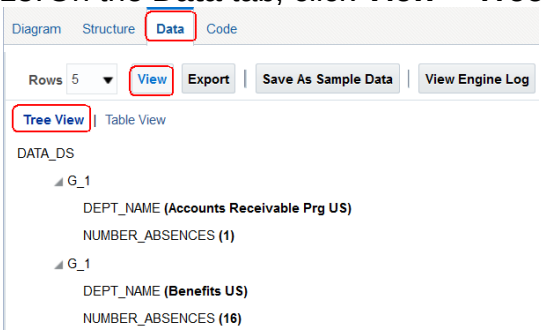
12. In the **XML Tag Name** field for the **Department Name**, replace the default value with **DEPT_NAME**, and replace the default value in the **Display Name** with **Department**.

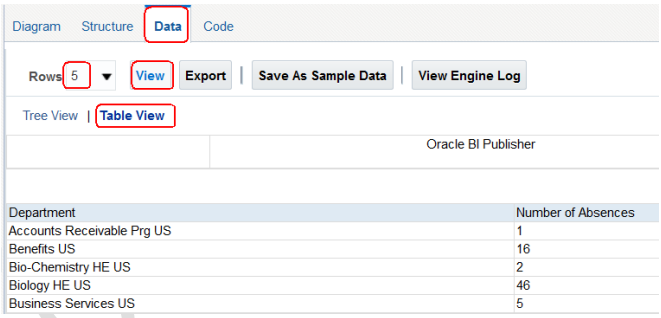
13. In the **XML Tag Name** field for the **Assignment Absences**, replace the default value with **NUMBER_ABSENCES**, and replace the default value in the **Display Name** with **Number of Absences**.

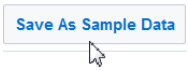


14. Click the **Data** tab.

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

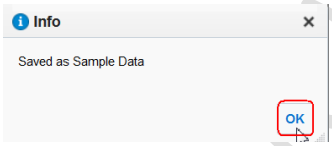




16. View the report structure and click **Save As Sample Data** 

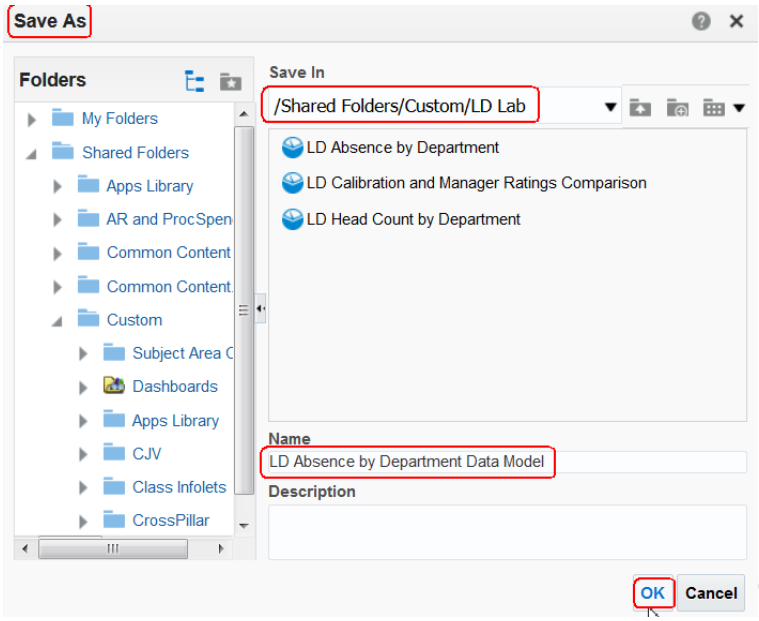
. If you do not save the sample data, you will not be able to complete Activity 8.

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.**


Save As
Folders
My Folders
Shared Folders
Apps Library
AR and ProcSpen
Common Content
Common Content
Custom
Subject Area C
Dashboards
Apps Library
CJV
Class Infolets
CrossPillar
Save In
/Shared Folders/Custom/LD Lab
LD Absence by Department
LD Calibration and Manager Ratings Comparison
LD Head Count by Department
Name
LD Absence by Department Data Model
Description
OK
Cancel

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.

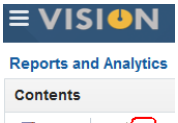
Requirements
You must have access to Oracle Fusion Application training instance (release 13), or your own instance (at your site) on which to complete this practice.

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

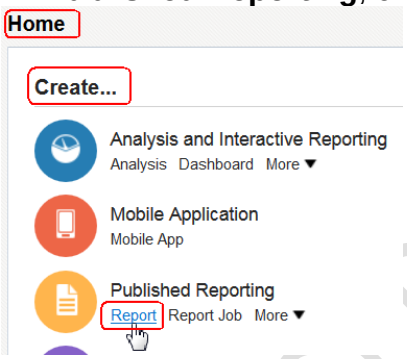
In this activity, you create a BI Publisher report using the data model that you created in the previous activity, and then add additional details to the report.
Sign in as **Brian.Joseph**.

Start Here:
Reports and Analytics work area

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

to open the BI Catalog.

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

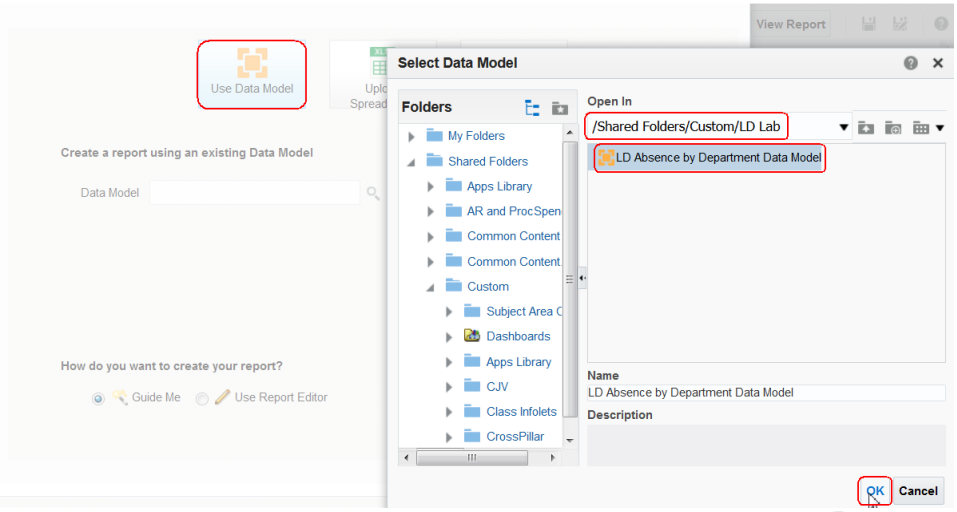


3. In the **Create Report** window, verify that **Use Data Model** is selected.

4. Click the **Search** button in the **Data Model** field.

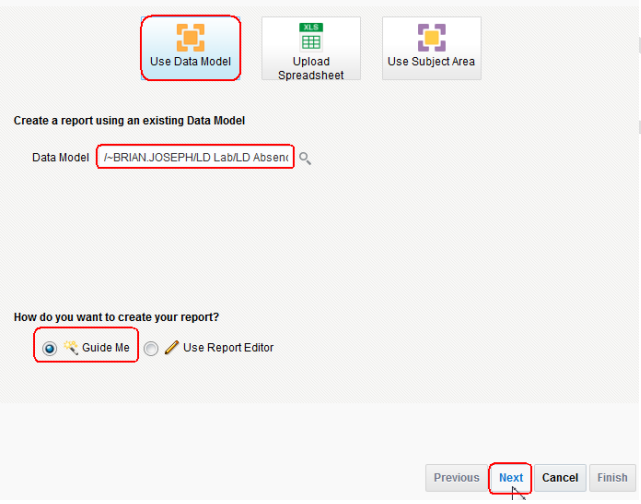
5. In the **Select Data Model** window, select your **<XX> Absences by Department Data Model**.

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 80% to see Next button

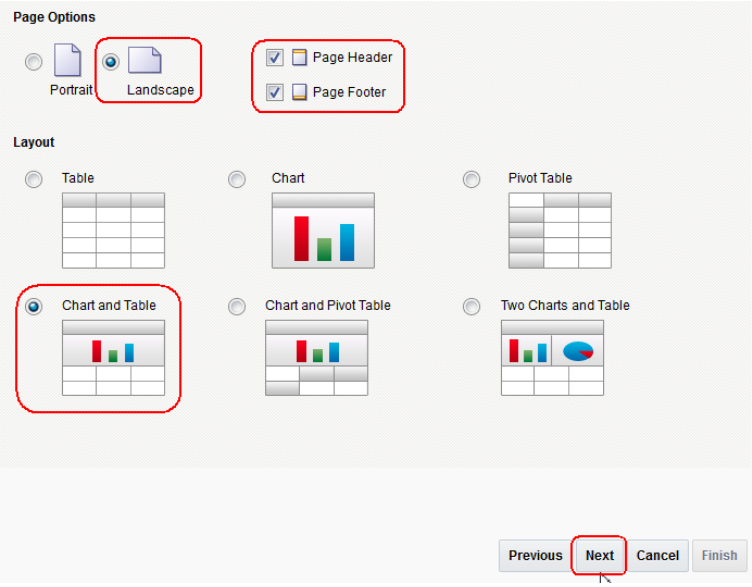


8. On the **Create Report**, **Select Layout page,** select **Landscape** for the layout.

9. Select the **Page Header** and **Page Footer** options.

10. Select the **Chart and Table** option.

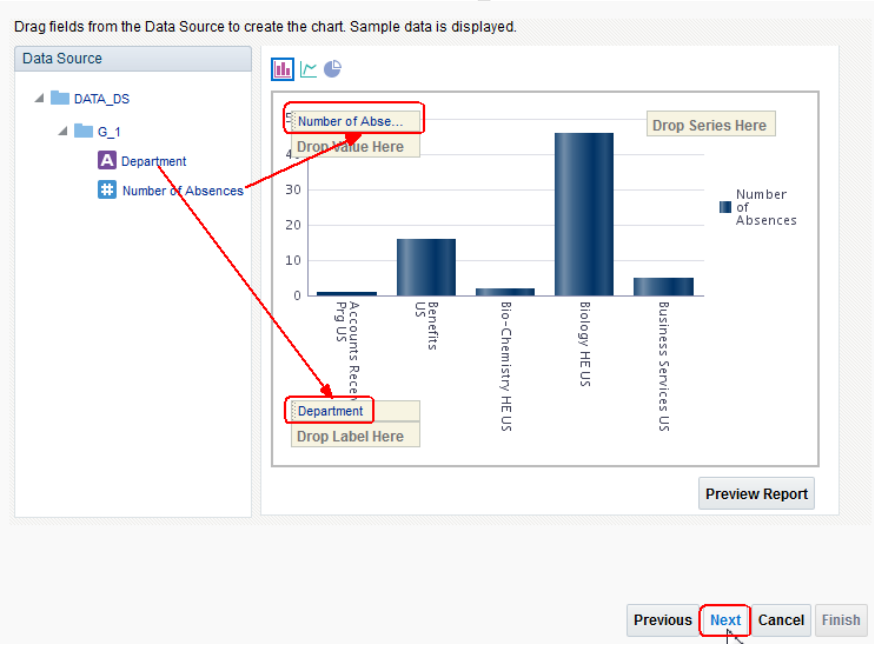
11. Click **Next**.



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

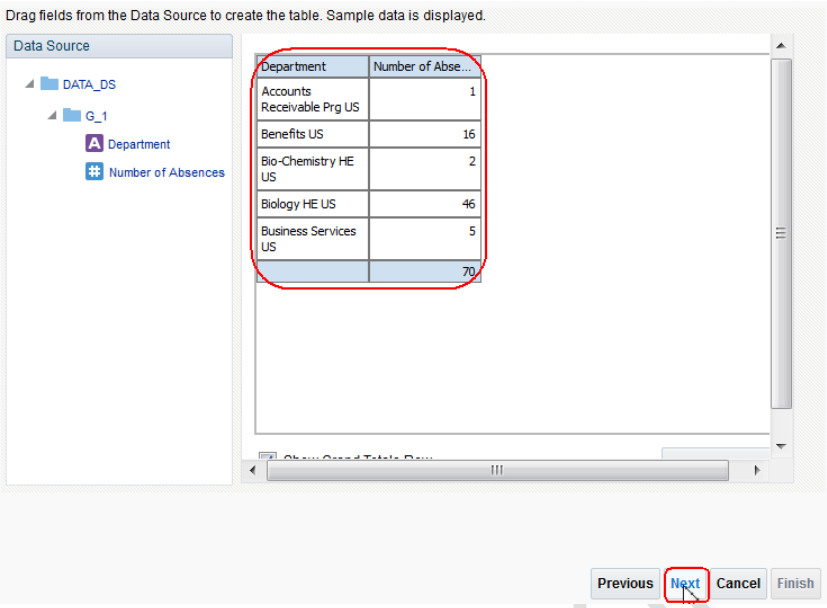
13. Drag **Department** and drop it onto the **Drop Label Here** box.

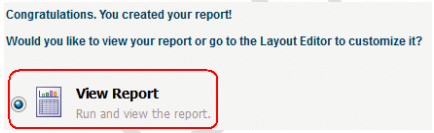
14. Click **Next**.



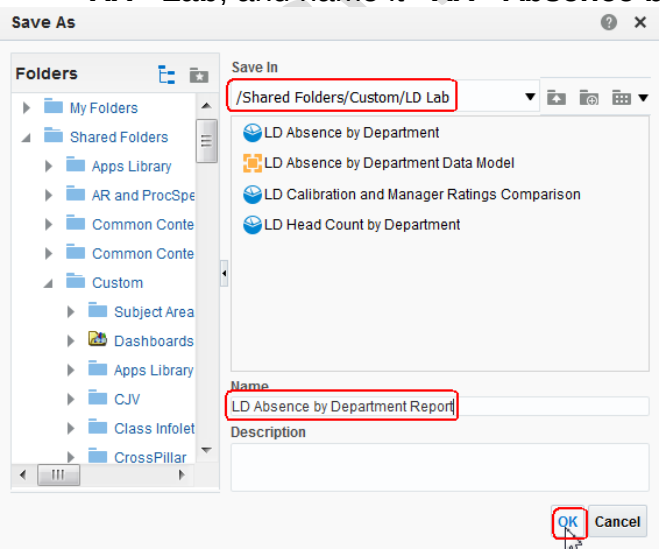
15. On the **Create Report, Create Table** page, review the location of each element in the table to make sure it is formatted correctly.

16. Click **Next**.



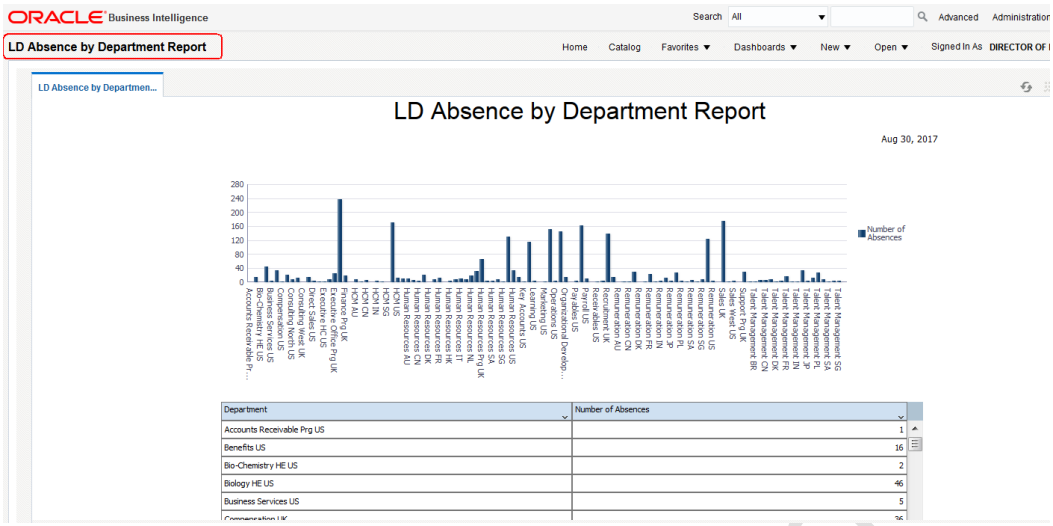
17. Select **View Report**  , and then click **Finish**.

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



19. Click **OK**.

20. The report appears.

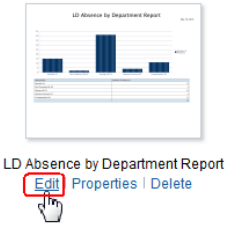


Add Additional Details to the Report

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 

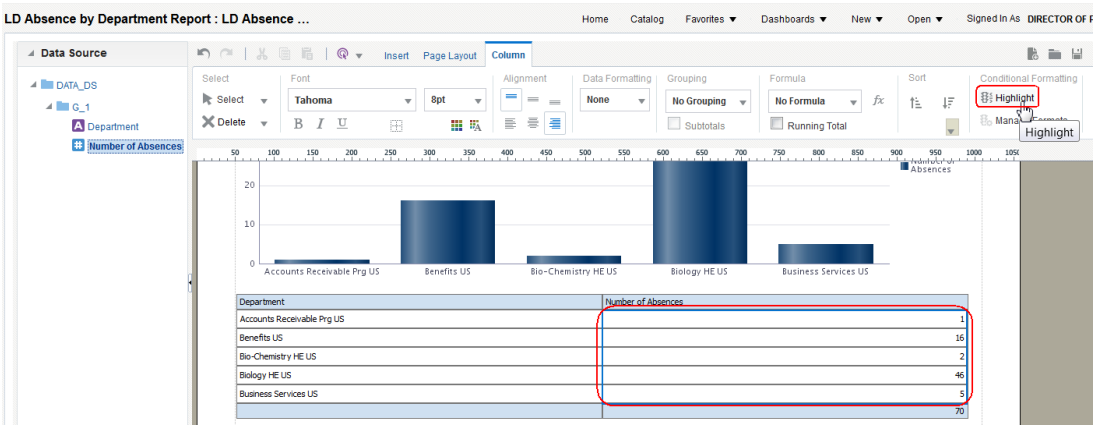
2. Click **Edit Report**.

4. Click **Edit**.

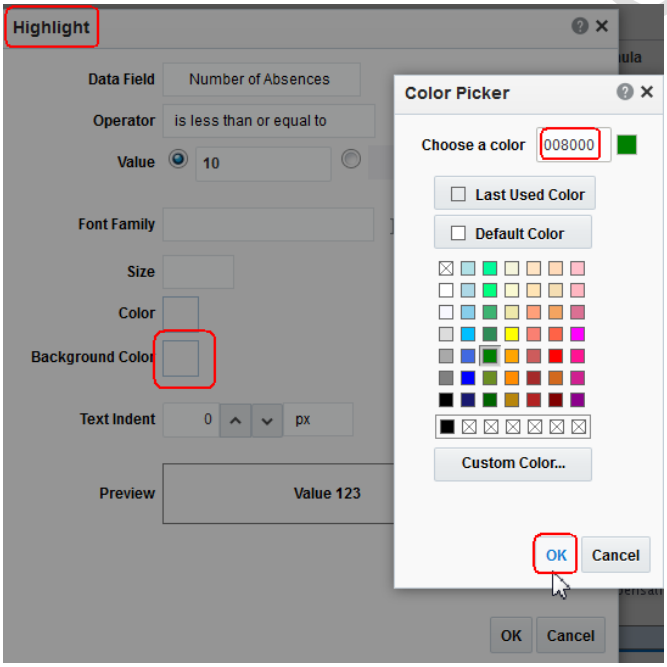


5. In the table, click on the cells in the **Number of Absences** column.

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.**



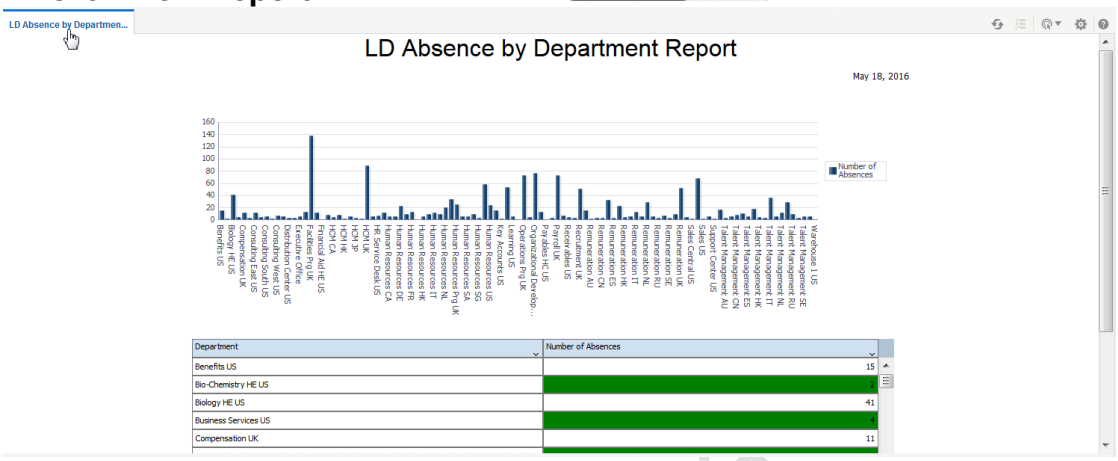
11. In the Highlight window, click **OK.**
12. Click **Save** to save the changes to your report.

13. Click **Done** 

.

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.

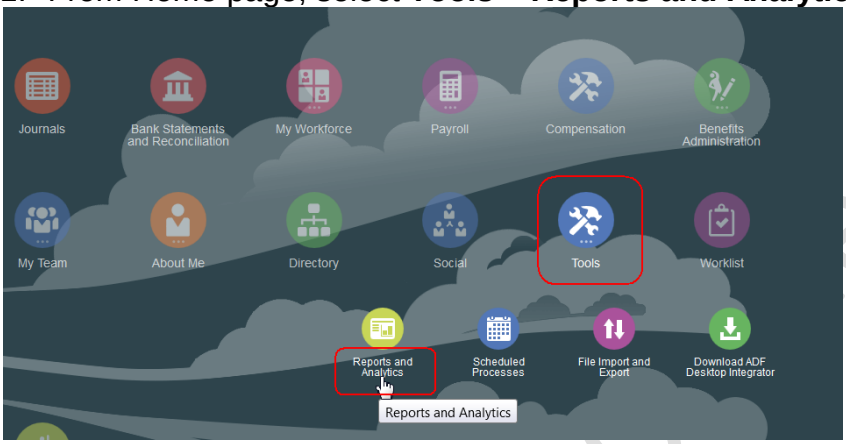
Activity Scope
Add the cross-subject area analysis, **<XX> Head Count by Department,** that you created in a previous lesson to a briefing book. Save the briefing book in Shared Folders > Custom > <XX> Lab, and name it **<XX> Briefing Book**.

Creating a Briefing Book

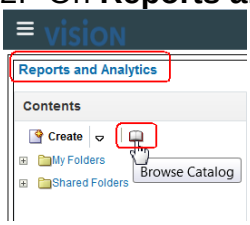
In this activity, you will add the cross-subject area analysis that you created in a previous activity to a briefing book.
Sign in as **Brian.Joseph**.

Start Here:
Home

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



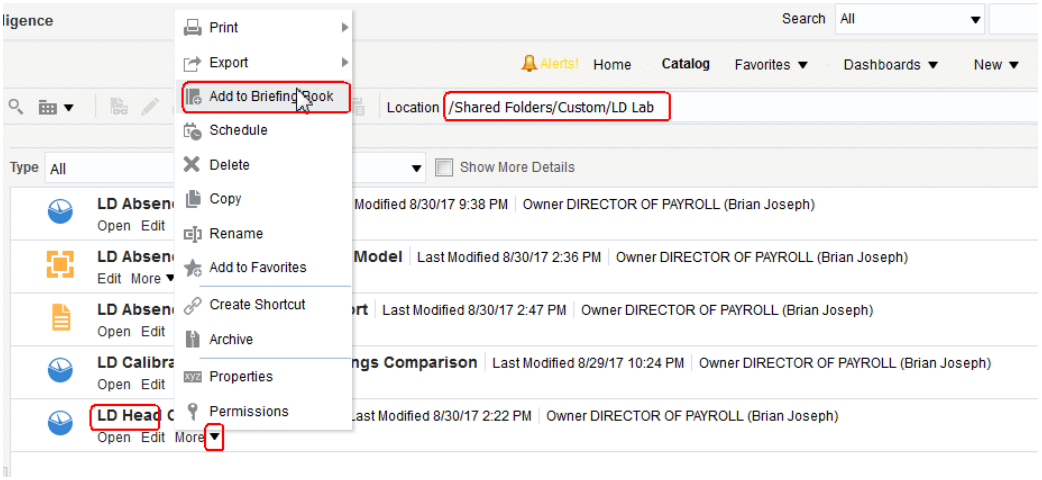
2. On **Reports and Analytics** page, click the **Browse Catalog** icon button.



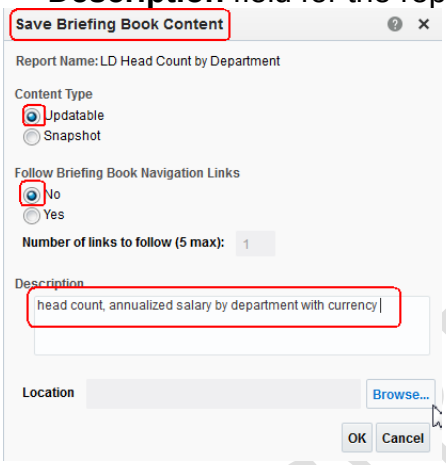
3. On the **Catalog** page, locate your cross-subject area analysis. <**XX> Head Count by Department**.

4. Click **Open** under the analysis name.

4. At the bottom of the analysis, click the **Add to Briefing Book** link.



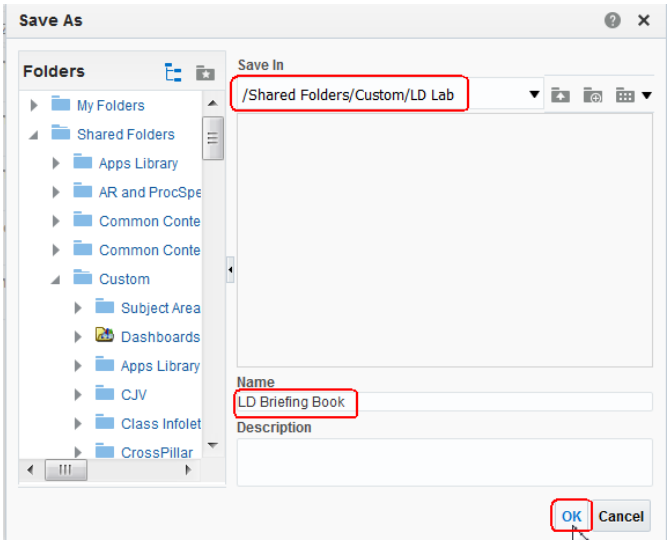
6. In the **Save Briefing Book Content** window, use default values for all fields, but enter **head count, annualized salary by department with currency** in the **Description** field for the report



7. Click the **Browse** button under the **Location** field.

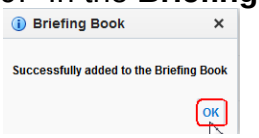
8. In the **Save As** window, select **Shared Folders > Custom > <XX> Lab,** and enter **<XX> Briefing Book** in the **Name** field.

7. Click **OK.**

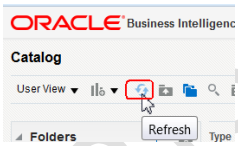


10. On the **Save Briefing Book Content** page, click **OK**.

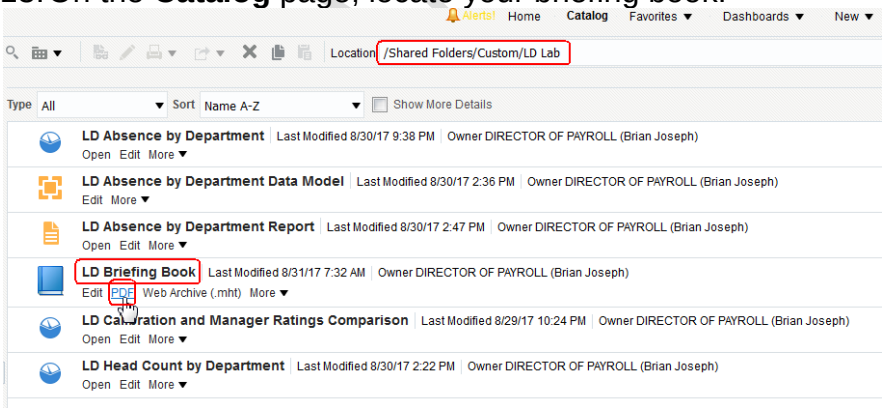
9. In the **Briefing Book** window, click **OK** in the confirmation window.



12. Click the **Refresh**

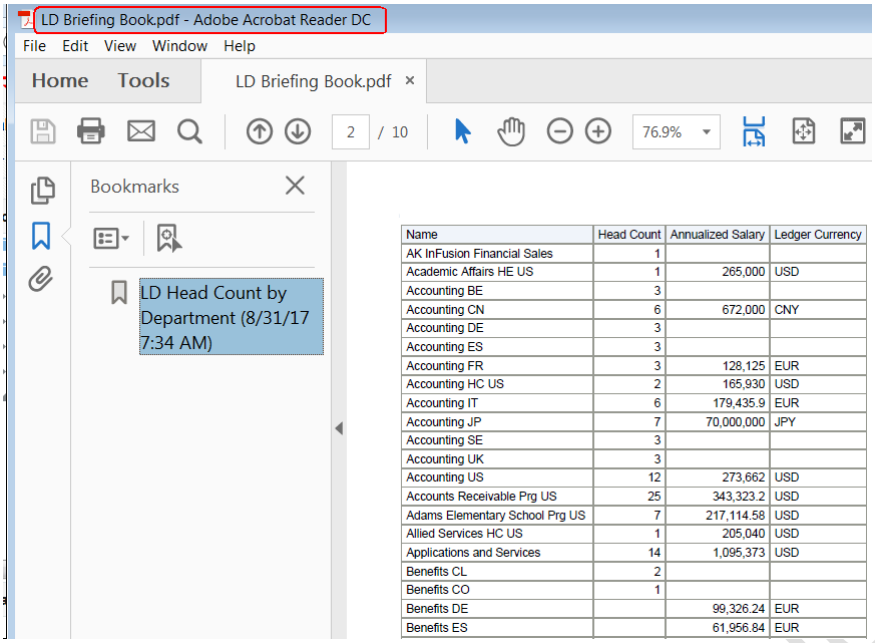


13. On the **Catalog** page, locate your briefing book.



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

15. Review the PDF containing your analysis.



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.

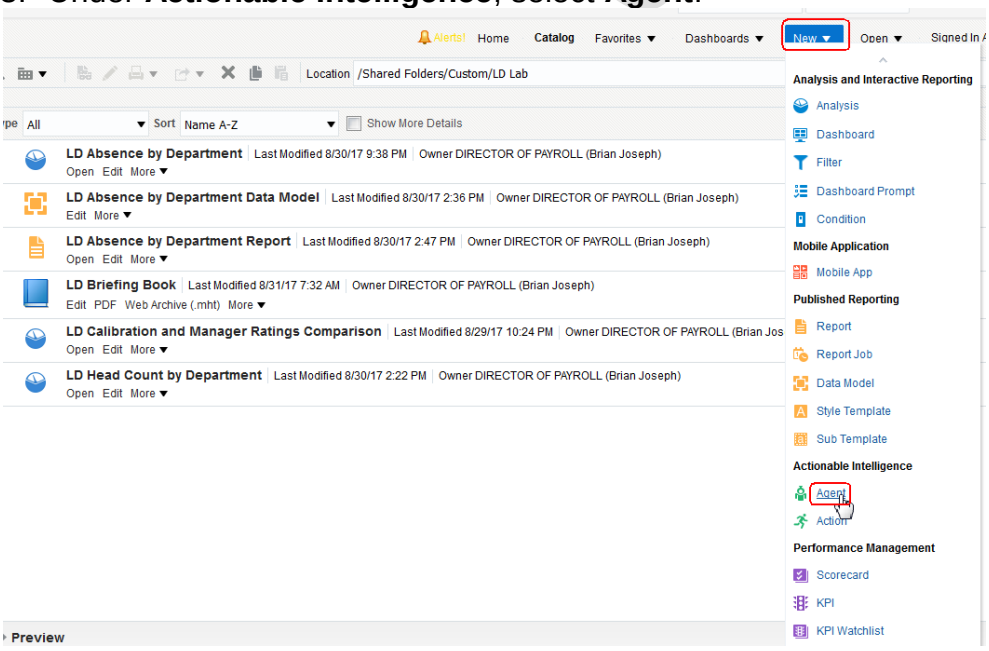
Activity Scope
Create an agent to deliver the briefing book that you created in a previous activity**.**

Creating an Agent

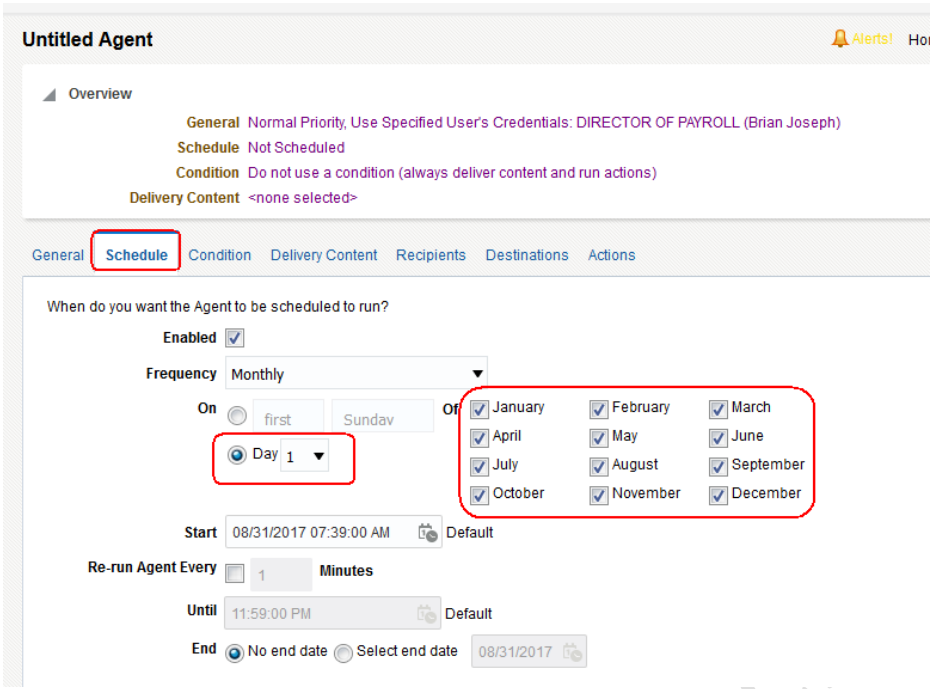
In this activity, you will create an agent to deliver the briefing book that you created in a previous lesson.
Sign in as **Brian.Joseph**.

Star 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.



8. Click the **Delivery Content** tab.

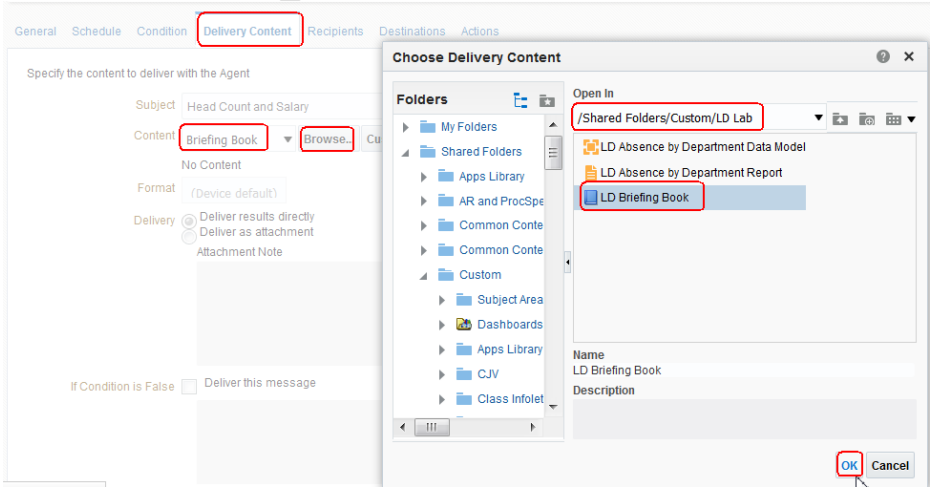
9. On the **Delivery Content** tab, in the **Subject field**, enter **Head Count and Salary**

10. In the **Content** field, select **Briefing Book**.

11. Click the **Browse** button.

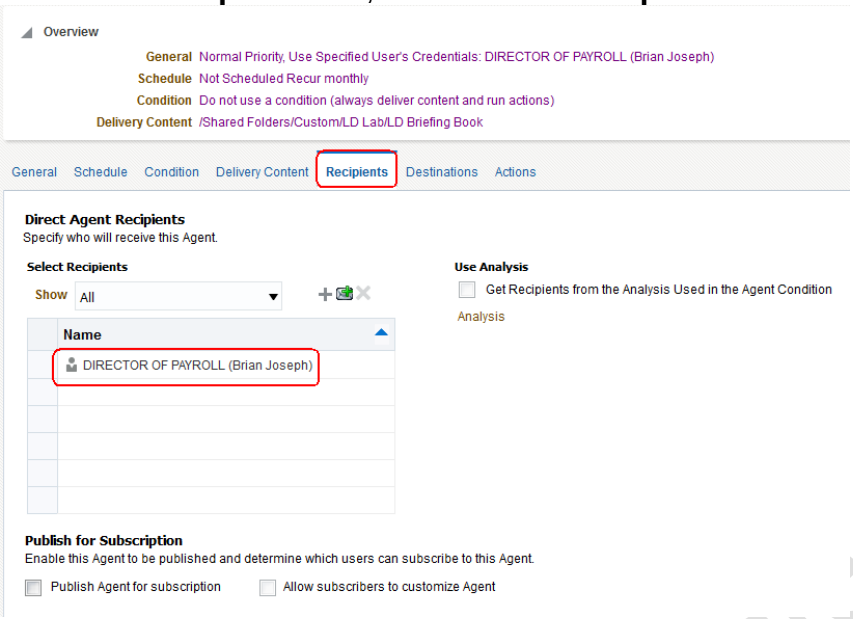
12. In the **Choose Delivery Content** window, locate and select the briefing book that you created in a previous activity.

13. Click **OK.**



14. Click the **Recipients** tab.

15. On the **Recipients** tab, select **Brian.Joseph**

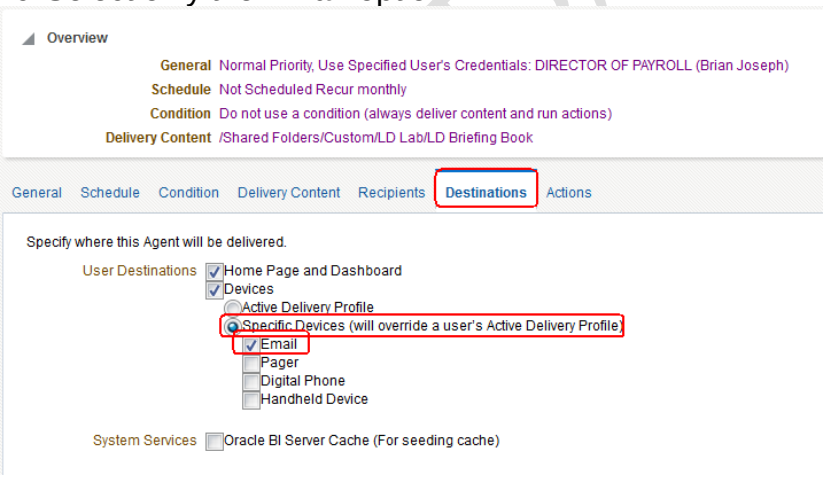


16. Click the **Destination** tab.

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

18. Select the **Specific Devices** option.

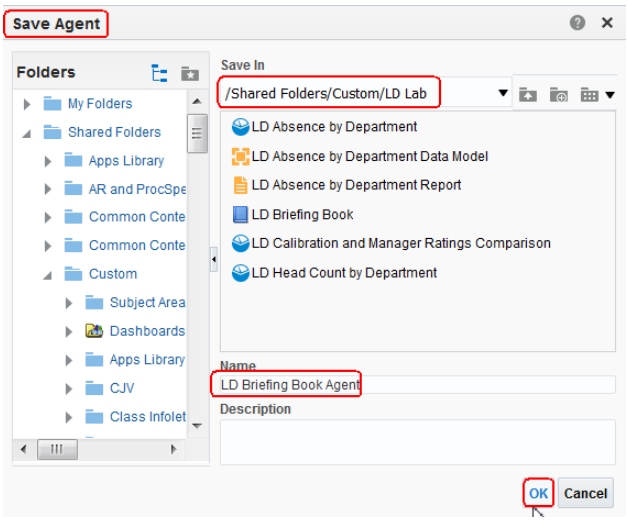
19. Select only the **Email** option.



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

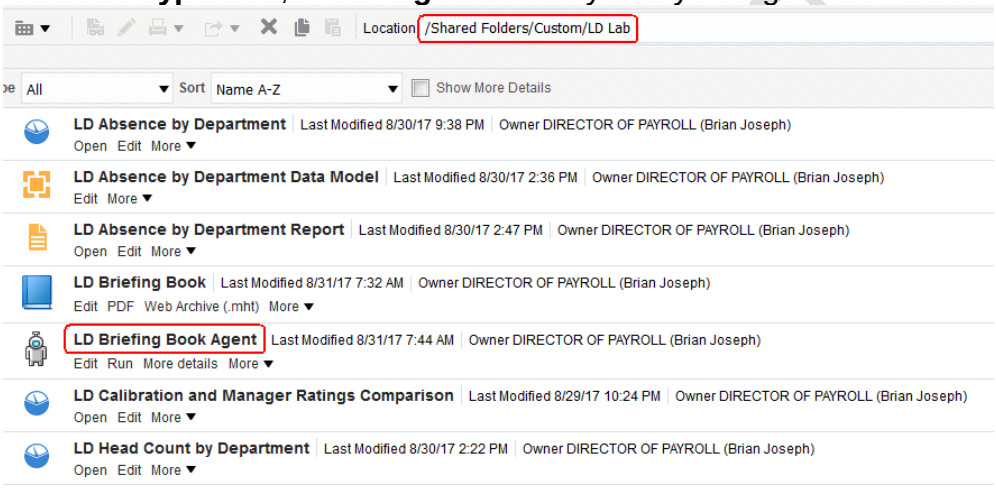
21. In the **Save Agent** window, select **My Folders** and enter **<XX> Briefing Book Agent** for the **Name**.

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.



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.

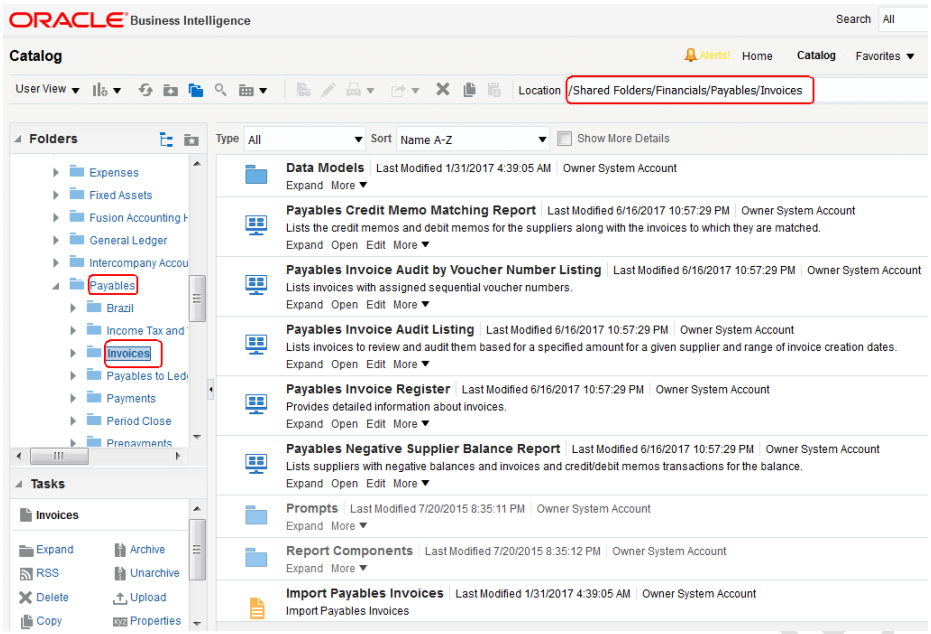
You are new to using Oracle Business Intelligence and need to find predefined Oracle Transactional Business Intelligence reports for Oracle Fusion Payables.

Assumptions

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

3.1 Accessing OTBI Reports

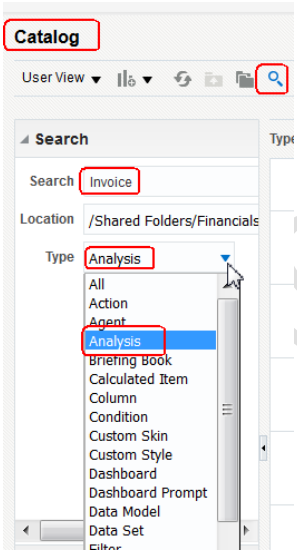
1. **Navigate to: Tools** > **Reports and Analytics.**
2. Click the **Browse Catalog** icon button in the toolbar.
3. Click the **Home** link. (First link on the right side of the top navigation bar.)
4. Use the Create section or the New menu to create analyses, dashboards, and other BI objects such 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.



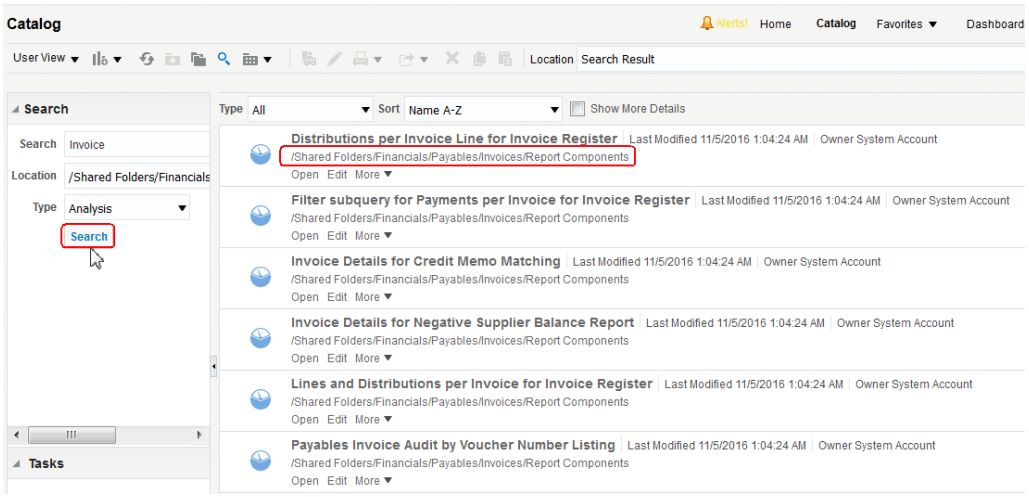
8. Expand the Report Components folder within the Invoices folder. Here you access individual analyses. Note the different icons to indicate the type of BI object you are looking at.

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.

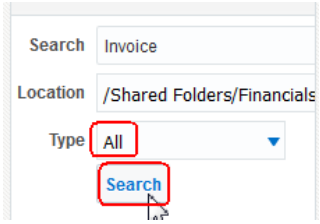
10. Enter **Invoice** as the keyword and click the **Search** icon button.



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.



12. Change *Type* to **All** and click **Search**



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.

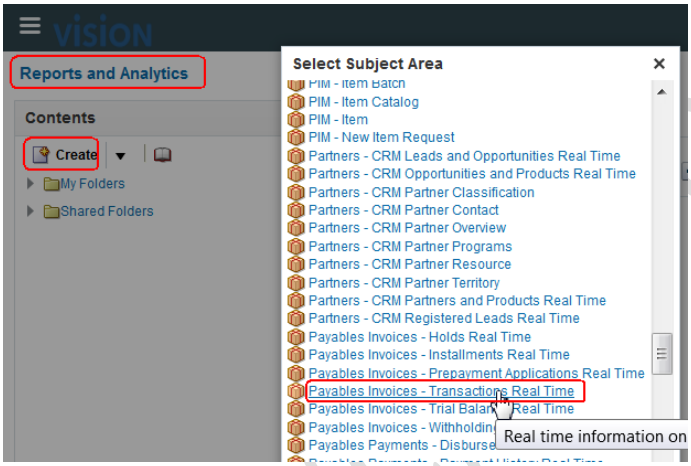
You need a simple listing of suppliers that can be easily exported to a Microsoft Excel file.

Assumptions

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

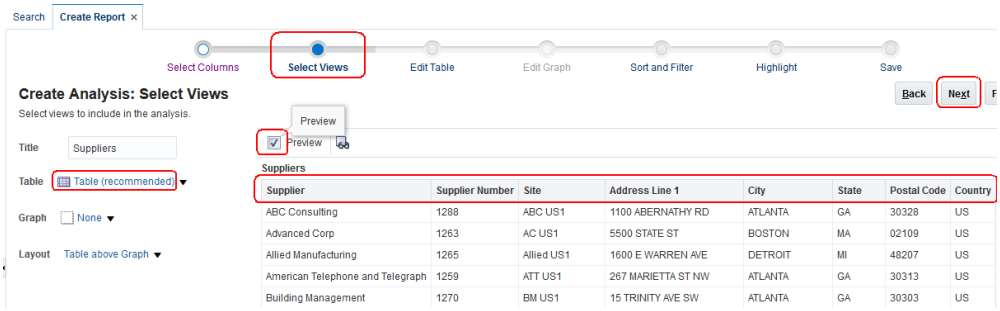
Tasks

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**.

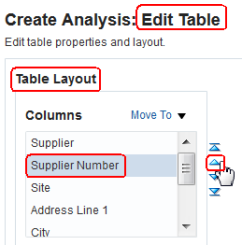


4. Expand the **Payables Invoices - Transactions Real Time** subject area**.**
5. Select the following attributes within the specified folders. Click the **Add** button after each selection to move the selection to the Selected Columns region.
    - Supplier
        - **Supplier**
        - **Supplier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

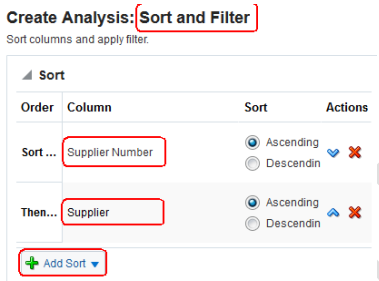
8. For the Table option, select Table (recommended); Preview.
9. Click the **Next** button.



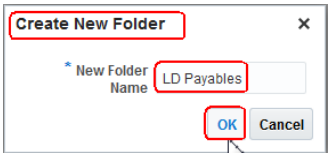
10. Click **Next**, and Move the **Supplier Number** attribute to the top.



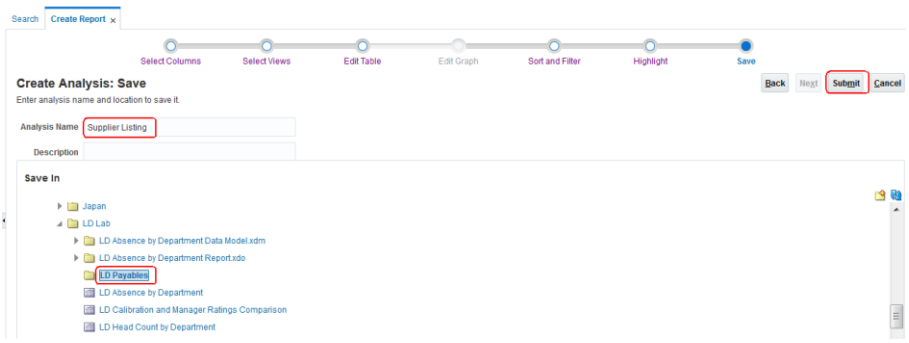
11. Click the **Next** button.
12. Click the **Add Sort** button and select **Supplier Number**.
13. Add another sort and select **Supplier**.



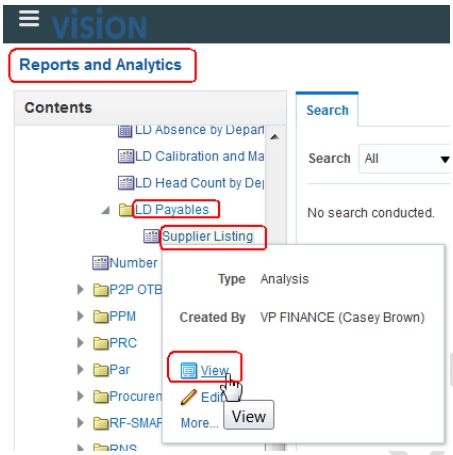
14. Click the **Next** button twice, skipping the highlight.
15. Select **Shared Folders > Custom > <XX> Lab**.
16. Click the **Create New Folder** icon (on the far right).
17. Enter the new folder name, **XX Payables.**
18. Click **OK**.



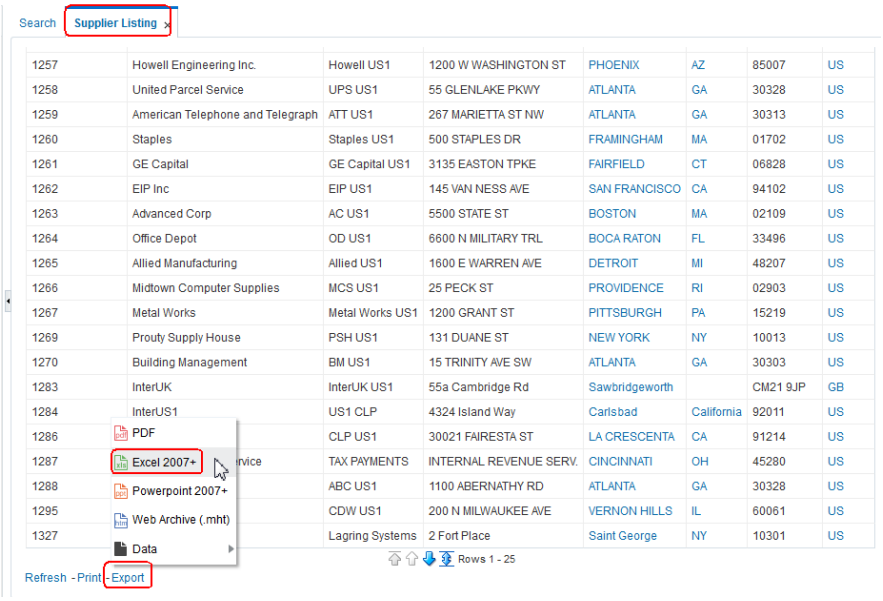
19. Select the new **XX Payables** folder**.**
20. Enter **XX Supplier Listing** in the **Analysis Name** field in the header.



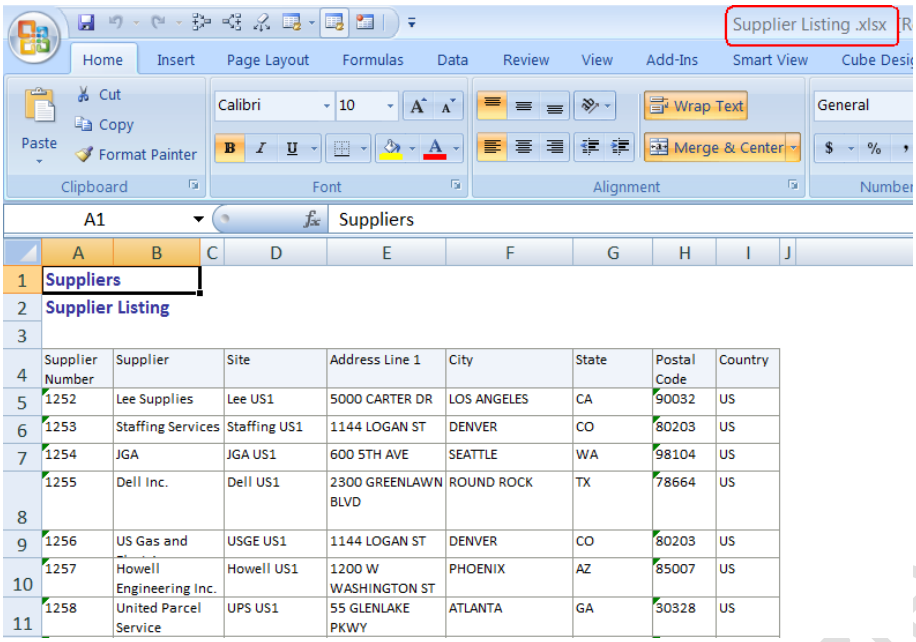
21. Click the **Submit** button.
22. Click the **OK** button.
23. In the Reports and Analytics panel, navigate to the folder you just created and expand it. (**Reports and Analytics > My Folders > XX Payables**.)
24. Click **XX Supplier Listing** and then the **View** link.



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



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



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	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

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.

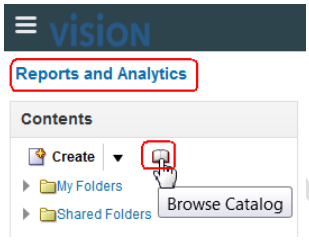
Assumptions

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

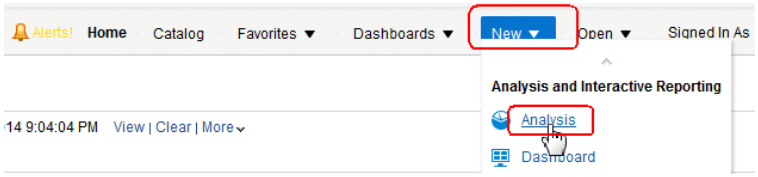
Tasks

Create Analysis and Table View

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



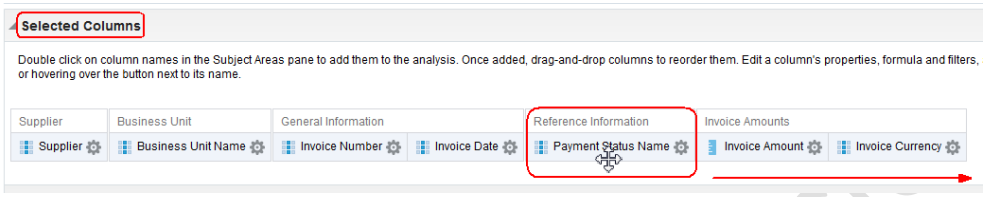
3. From the **Create** menu, select **Analysis**.



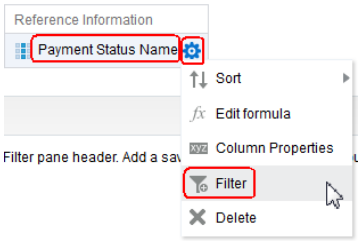
4. From the list of subject areas, select **Payables Invoices - Transactions Real Time**.
5. In the Subject Areas panel, expand the following folders and double-click the specified attributes to add them to the Selected Columns section.
   - Supplier
     - **Supplier**
   - Business Unit
     - **Business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

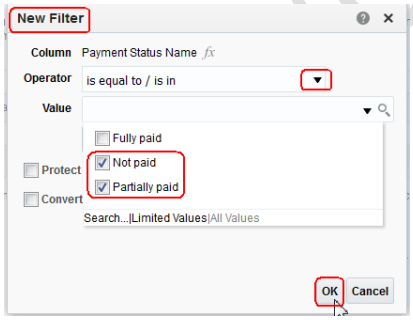
6. Select **Payment Status Name** column (from Selected Columns) and move it at the end of the table.



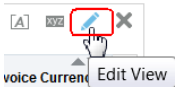
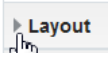
7. Add a filter to the **Payment Status Name** attribute. For the **Payment Status Name** column, open the contextual menu, and select Filter.



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.

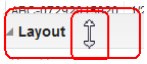


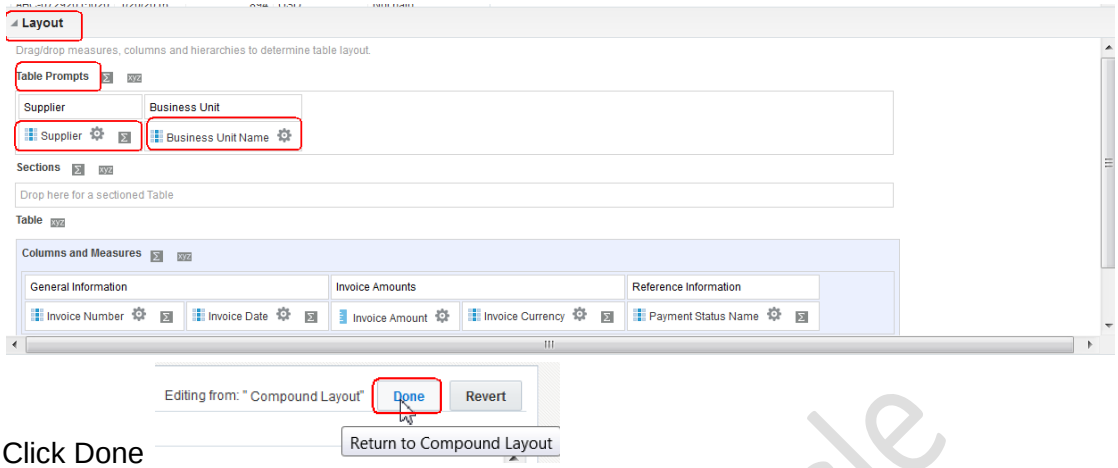
10. Select the Results tab to see the compound layout that displays selected data in a tabular view.

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

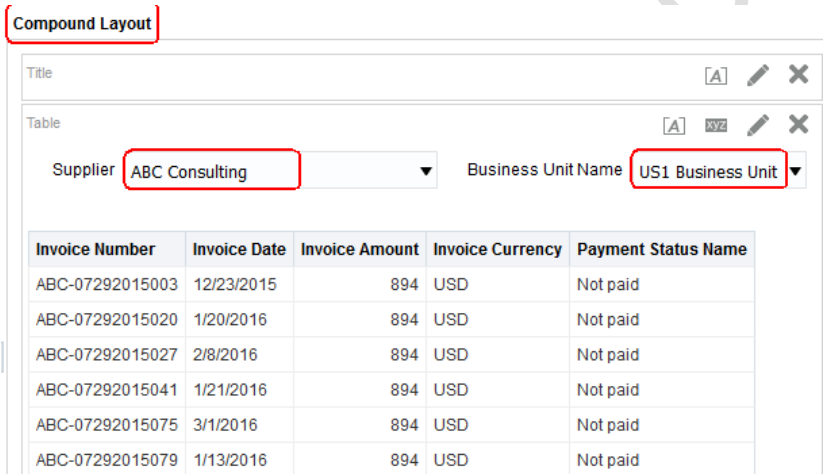
gray bar and drop the Supplier column in the Table Prompts area. Move the Business Unit Names column to the right of the Supplier in the Table Prompts region.

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



Click Done

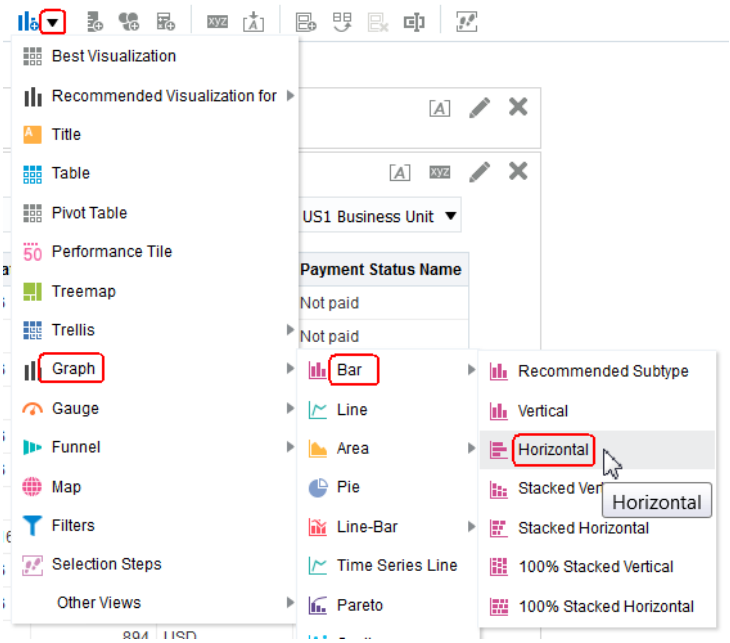
12. Select ABC Consulting for the **Supplier** field and US1 Business Unit for the **Business Unit Name** field. The table refreshes to show all the invoices with a payment status of Not paid or Partially paid, for the specified supplier and business unit.



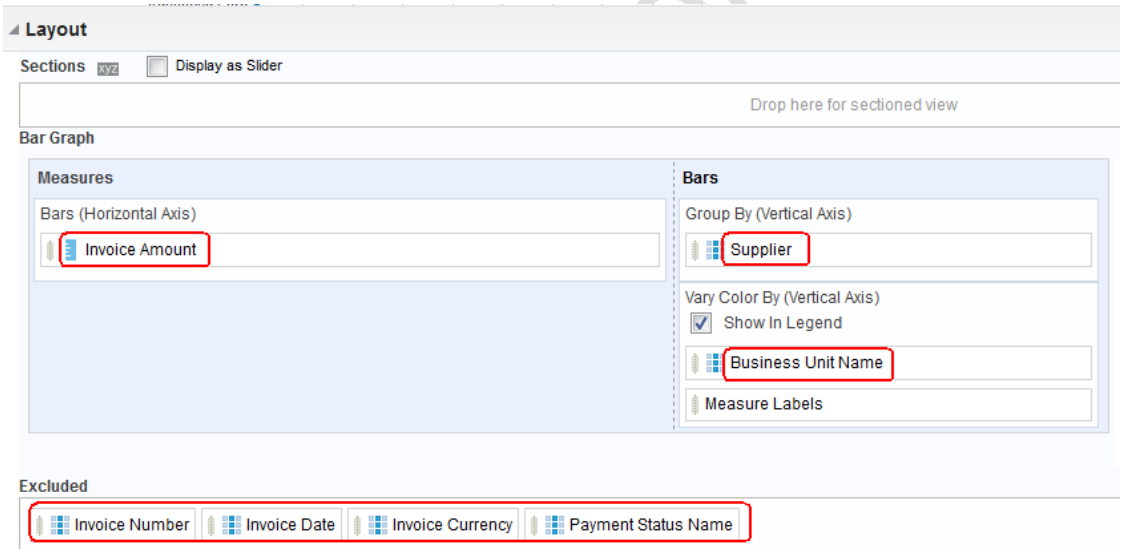
Invoice Number	Invoice Date	Invoice Amount	Invoice Currency	Payment Status Name
ABC-07292015003	12/23/2015	894	USD	Not paid
ABC-07292015020	1/20/2016	894	USD	Not paid
ABC-07292015027	2/8/2016	894	USD	Not paid
ABC-07292015041	1/21/2016	894	USD	Not paid
ABC-07292015075	3/1/2016	894	USD	Not paid
ABC-07292015079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

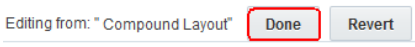
Create Graph View

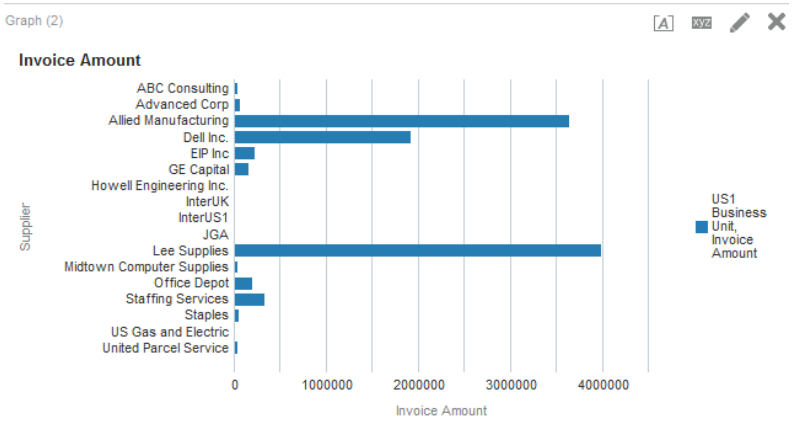
13. In the toolbar of the Results tab, click the **New View** icon button and select Graph > Bar > Horizontal.



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

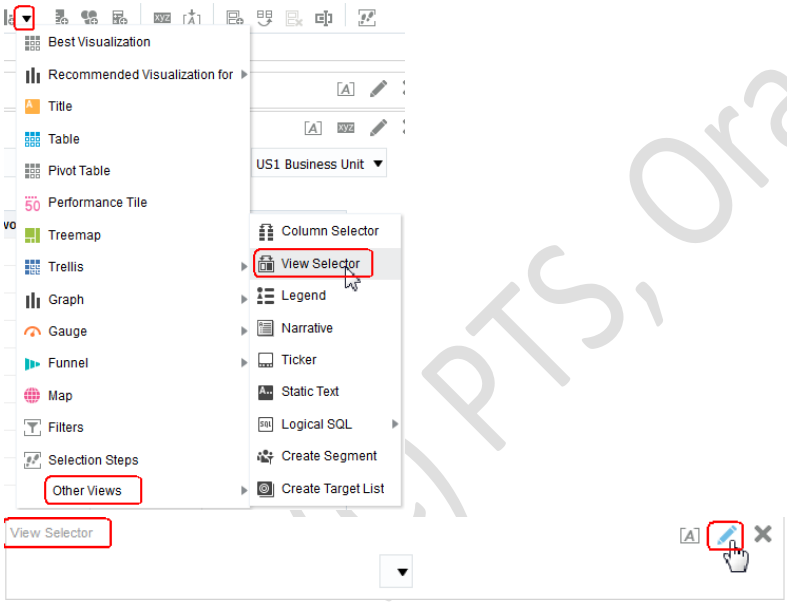


19. Click the **Done** button  .

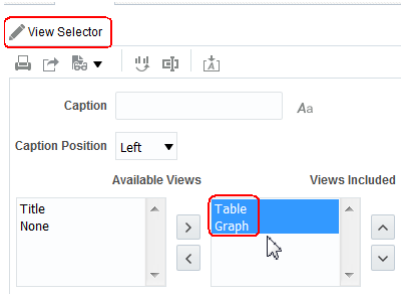


Create View Selector

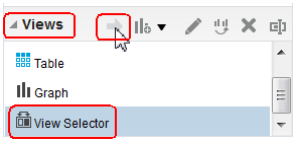
20. In the toolbar of the Views panel on the Results tab, click the **New View** icon button and select **Other Views > View Selector**.



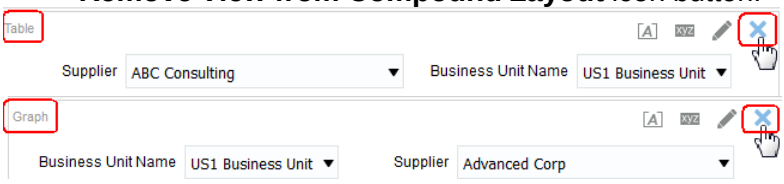
21. Include the **Table** and **Graph** views.



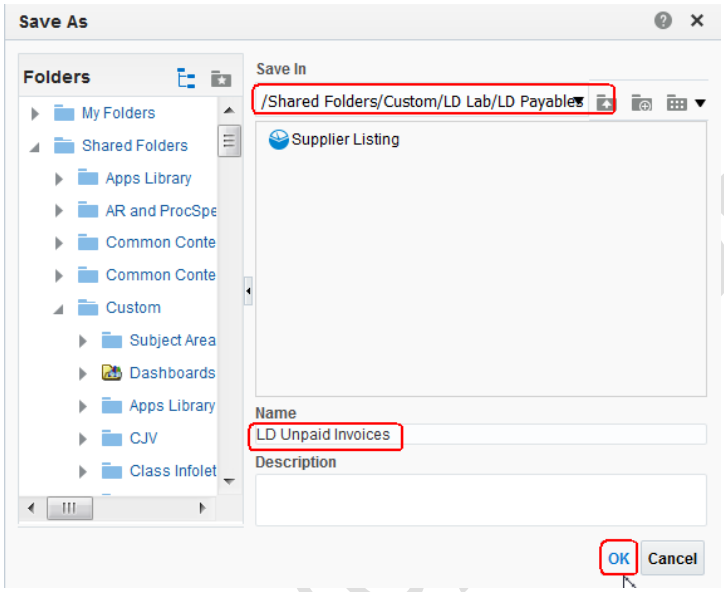
22. Click the **Done** button.
23. With **View Selector** selected in the Views panel, click **Add View** on the panel toolbar.



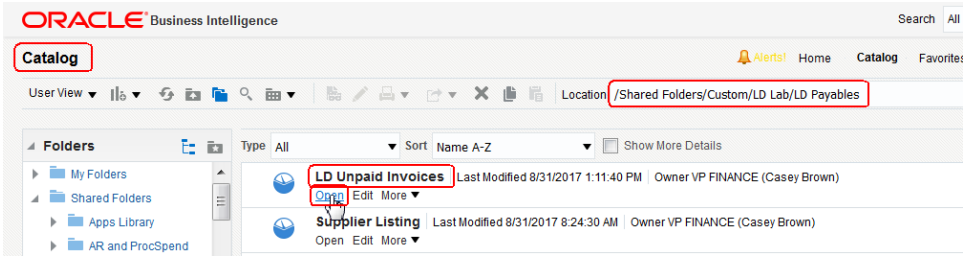
24. For the Table and Graph subsections within the Compound Layout section, click the **Remove View from Compound Layout** icon button.



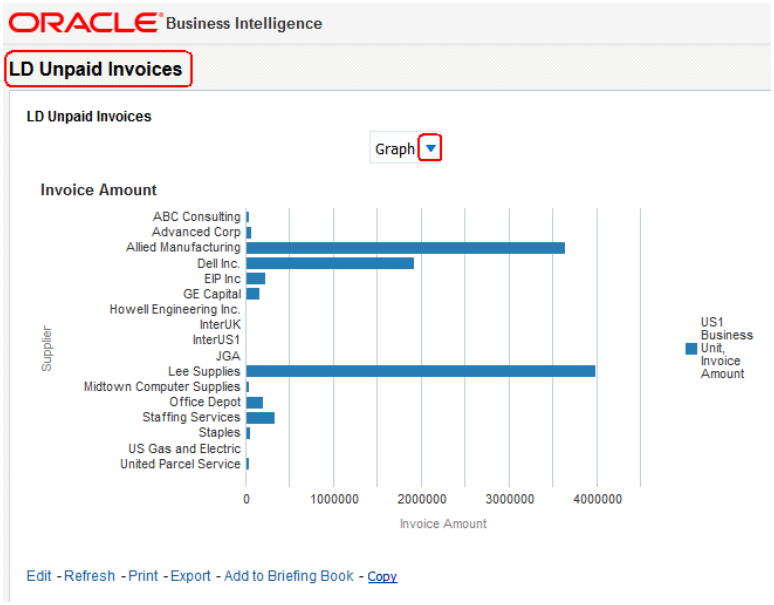
25. Click the **Save Analysis** icon button (diskette icon on the far right).
26. Select **Shared Folders > Custom > XX Payables**.
27. Enter **XX Unpaid Invoices** as the analysis name and click **OK**.



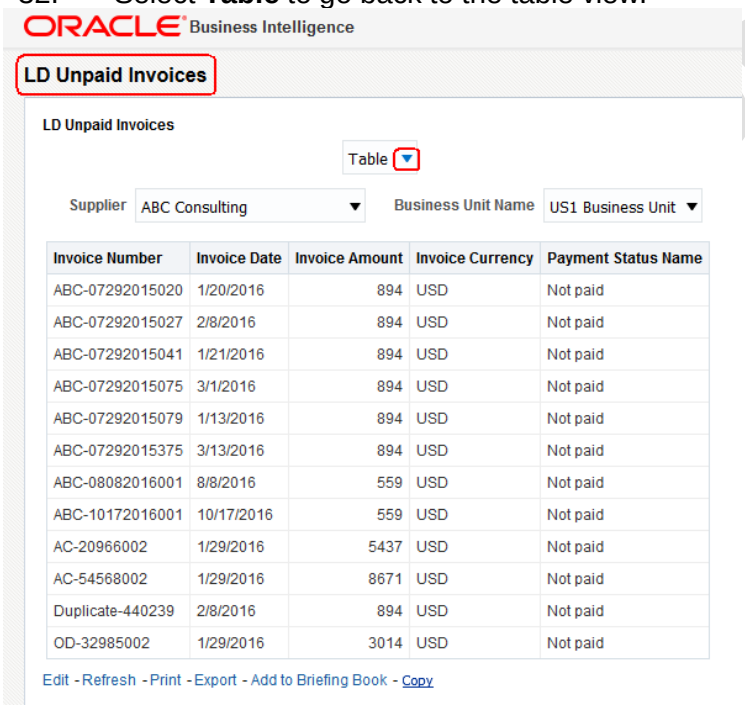
28. Click the **Catalog** link near the top of the page.
29. Go to **Shared Folders > Custom > XX Payables > XX Unpaid Invoices.**
30. Click **Open.**



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



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



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

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.

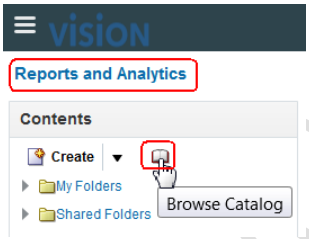
Assumptions

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

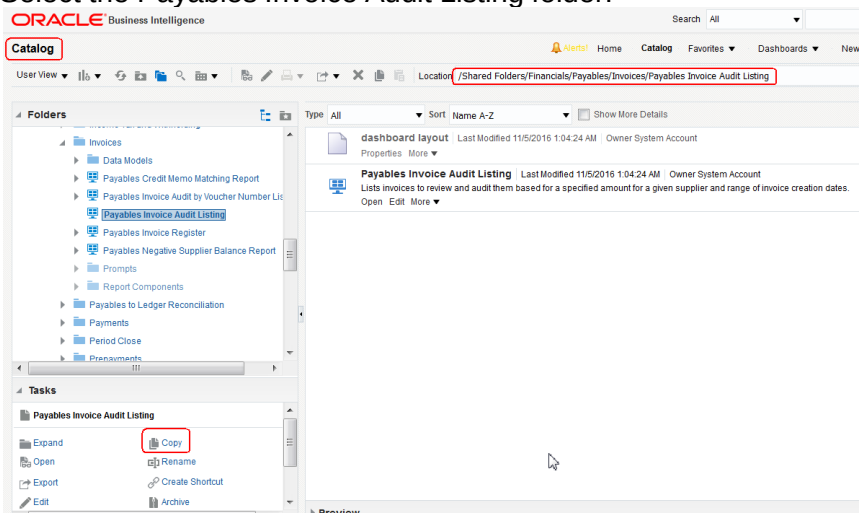
Tasks

Copy Dashboard:

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



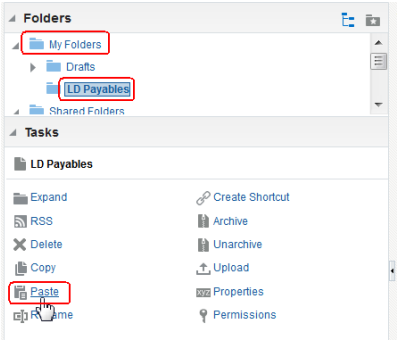
3. In the Folders panel, go to **Shared Folders > Financials > Payables > Invoices > Payables Invoice Audit Listing**.
4. Select the Payables Invoice Audit Listing folder.



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

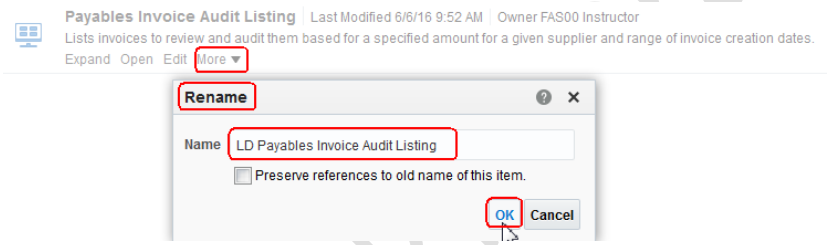
5. Click the **Copy** icon button in the toolbar.

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

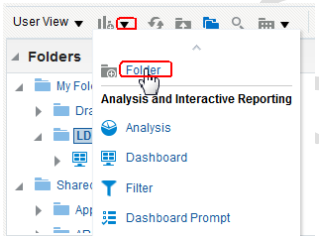


8. For the pasted Payables **Invoice Audit Listing** dashboard, click the **More** link and select **Rename**.

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

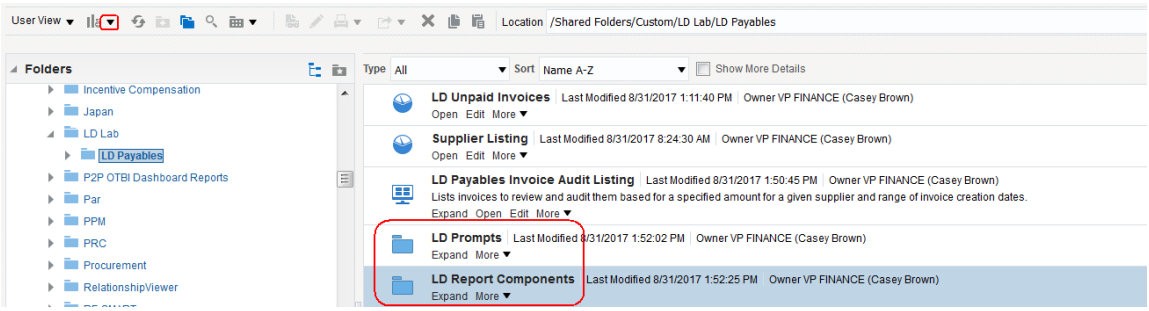


8. In the toolbar directly above the Folders panel, click the **New** icon button and select **Folder**.



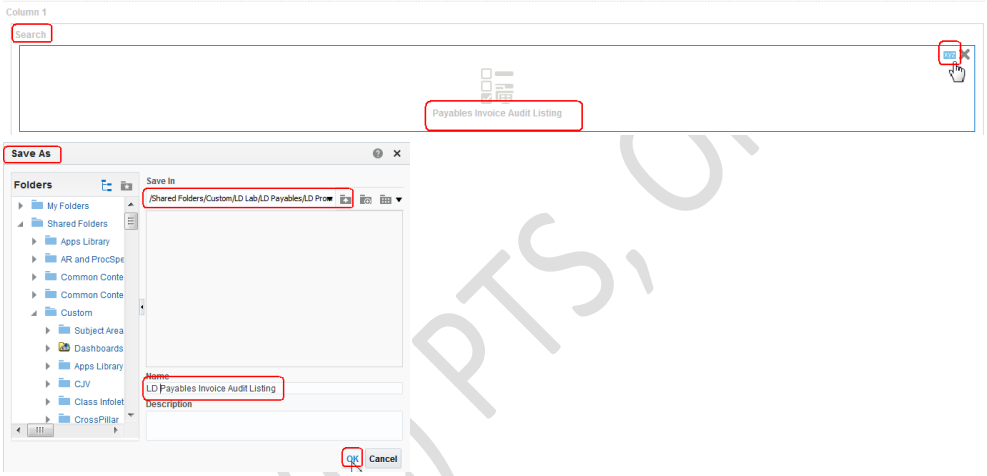
9. Enter **XX Prompts** in the Name field and click OK.

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

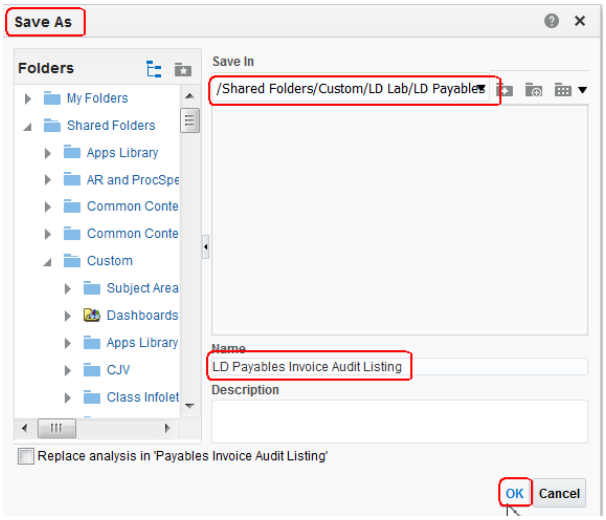


13. In the Folders panel, go to **Shared Folders > Financials > Payables > Invoices > Payables Invoice Audit Listing**. From the Open, Edit and More links available, click on the **Edit** link

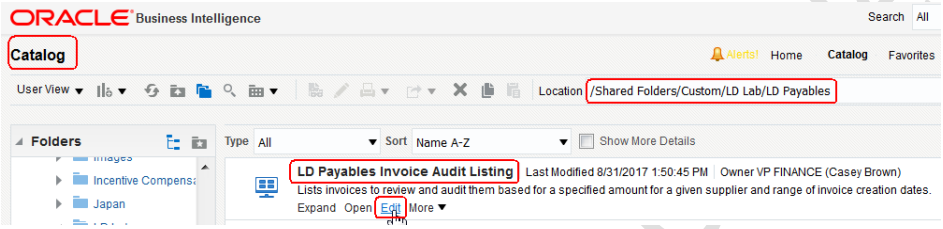
14. Place your mouse on the icon representing the **prompt** "**Payables Invoice Audit Listing**" in the dashboard edit screen (Search Region), towards the right you will find a properties icon, click and select "**Edit**", the Prompt will open up for edit, from the top right select "**Save As**" icon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



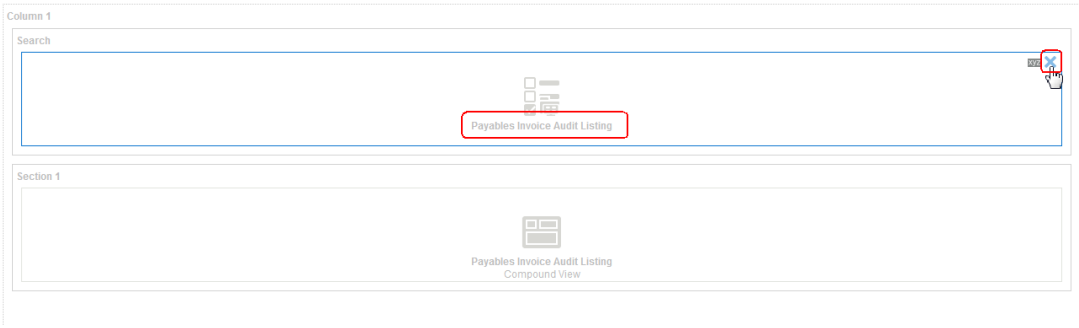
15. Place your mouse on the icon representing the compound view "**Payables Invoice Audit Listing**" in the dashboard edit screen (Section 1 Region), towards the right you will find a **properties** icon , click and select "**Edit Analysis**", the Analysis will open up for edit, from the top right select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



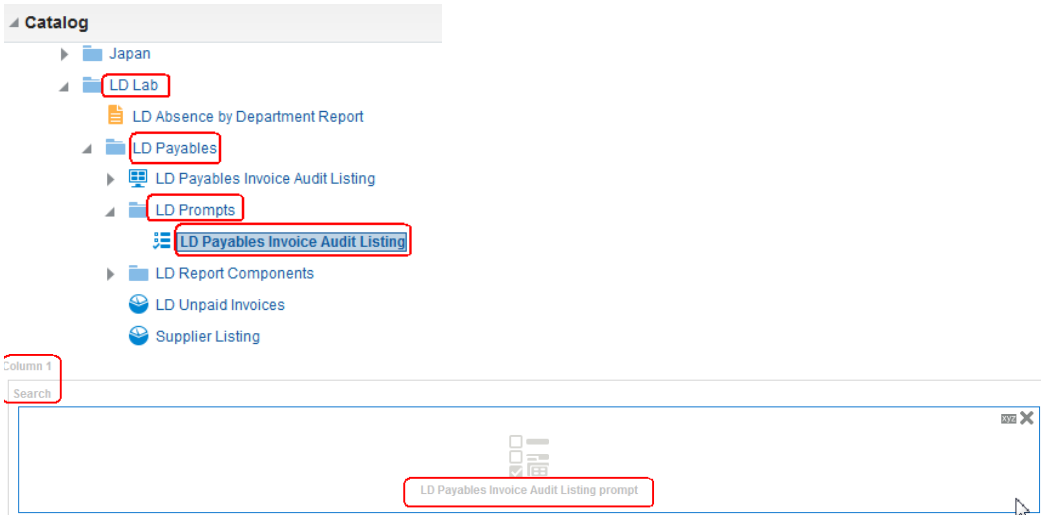
16. Go to **Shared Folders > Custom > XX Payables > XX Payables Invoice Audit Listing**.
17. Click the **Edit** link for the **Payables Invoice Audit Listing** dashboard.



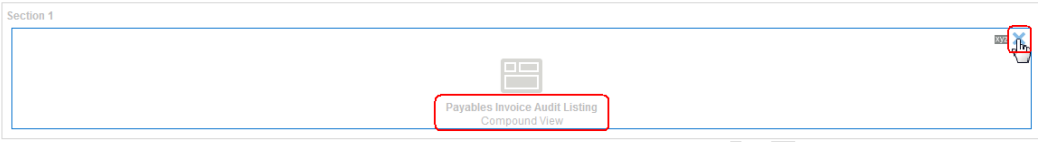
18. Click the **Delete** icon button for the **Payables Invoice Audit Listing** dashboard prompt within the Search region. The button appears after you hover inside the region.
    Note: Click **Delete** from the **Payables Invoice Audit Listing** region that is inside the Search region. Note that a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



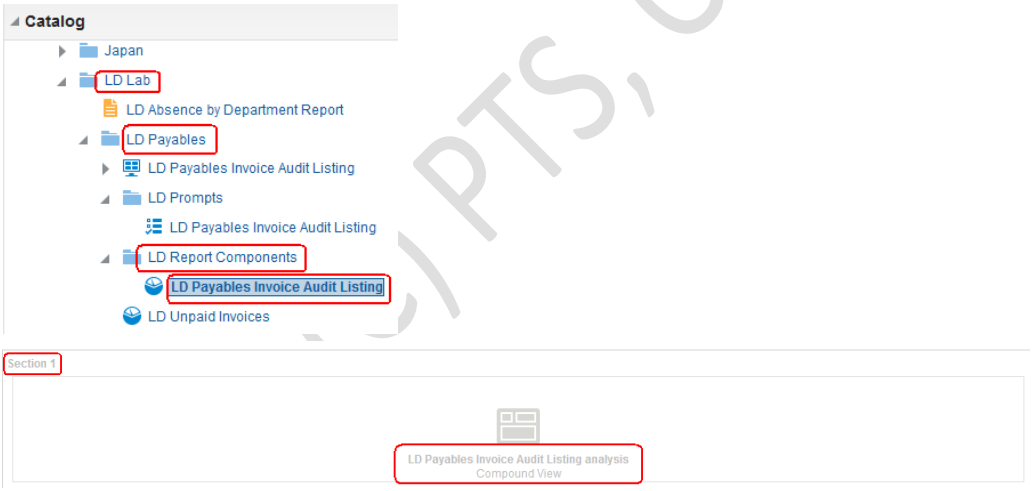
19. In the Catalog panel, select **Shared Folders > Custom > XX Payables > XX Prompts > "XX Payables**
    Invoice Audit Listing prompt" and drag it into the **Search** region.



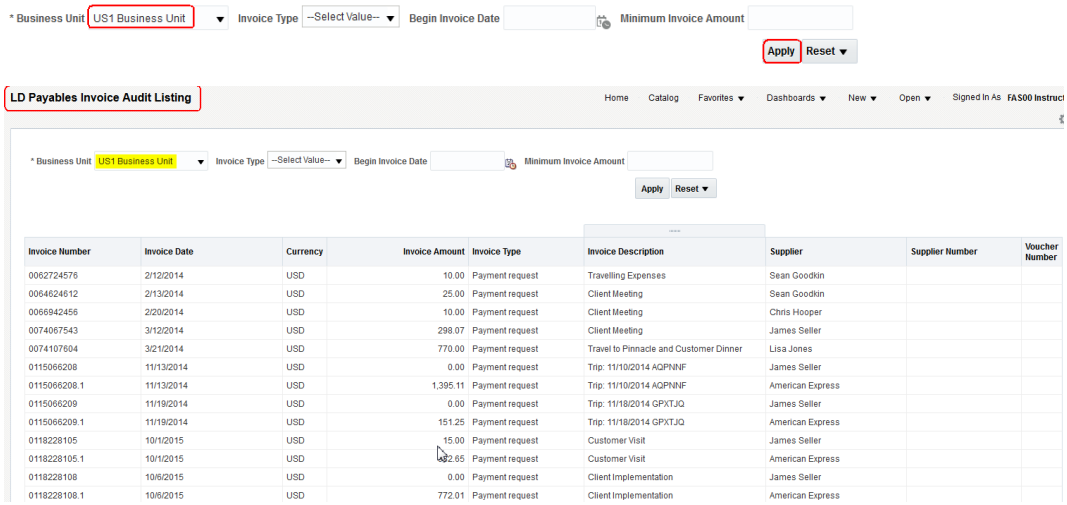
20. Delete the **Payables Invoice Audit Listing** compound view within the **Section 1** region.



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.

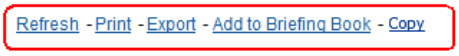


22. Click the **Save** icon button .
23. Click the **Run** button .
24. Select **USA1 Business Unit** for the **Business Unit** prompt and click the **Apply** button.



Create Graph View

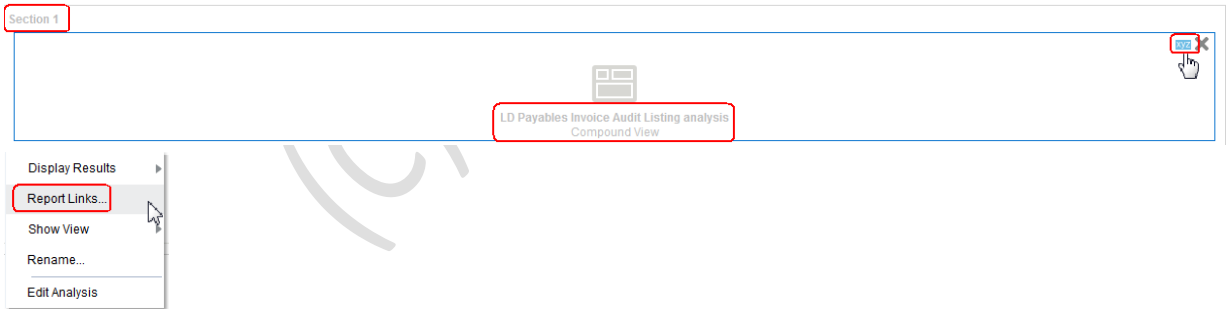
25. Notice there is no **Edit** link at the bottom of the report



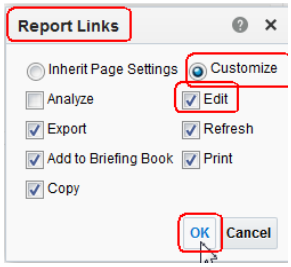
Click on LD Payables Invoice Audit Listing: Payables Invoice Audit Listing

Click on > Edit Dashboard

Go to **Section 1**, **Properties**



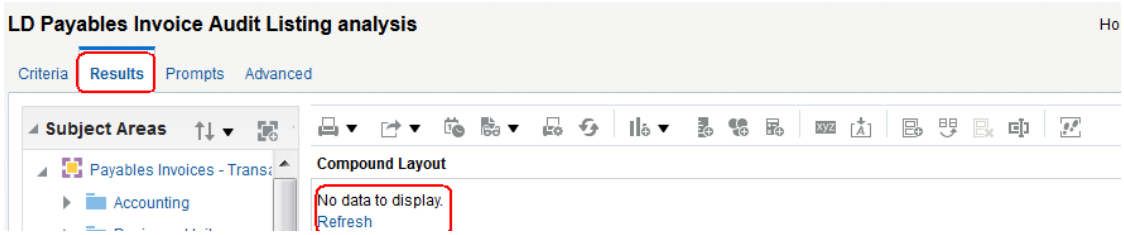
Report Links > **Customize** > select **Edit** > click **OK**



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

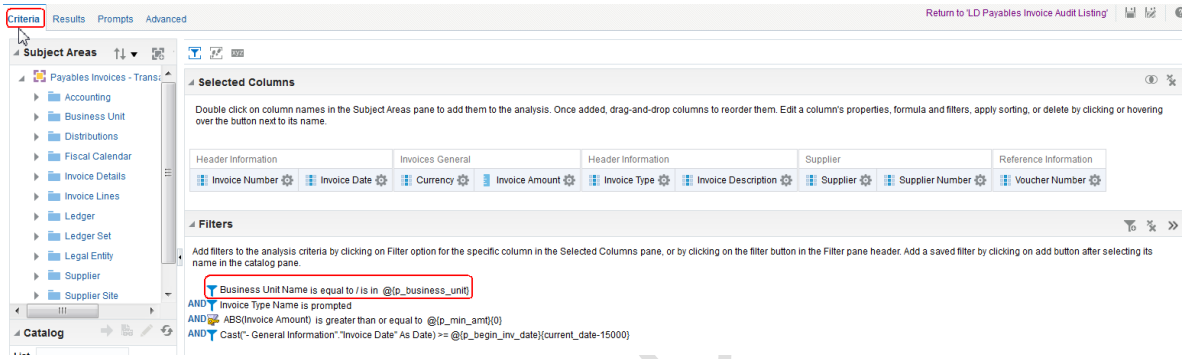
Click the **Edit** link at the bottom of the report.

Notice there is "**No data to display**"

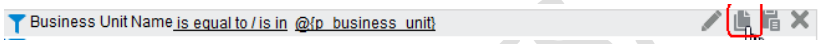


You cannot add new visualization at this time, unless you modify the filter that restrict the data:

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

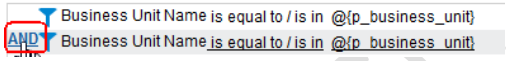


> Go to the **Filters** pane and copy '**Business Unit Name**' filter

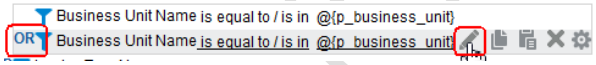


> Then click on **Paste**

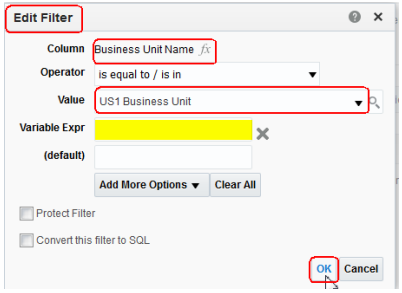
> Click on '**AND**'



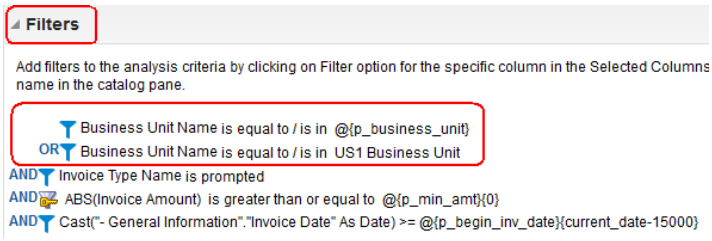
> Check the '**OR**' change and click on '**Edit**'



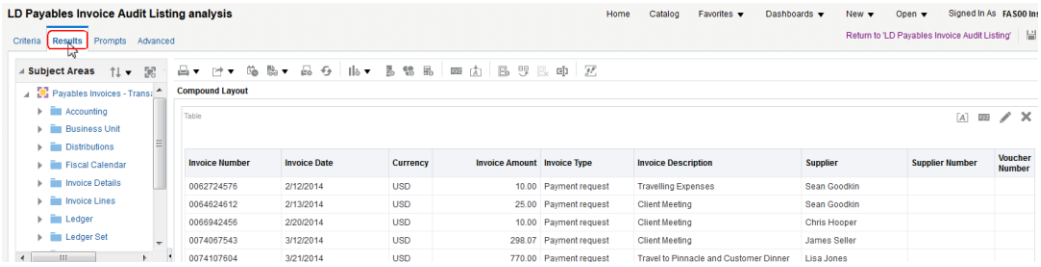
- Choose 'US1 Business Unit' and remove Variable Expr '**p_business_unit**' and click '**OK**'



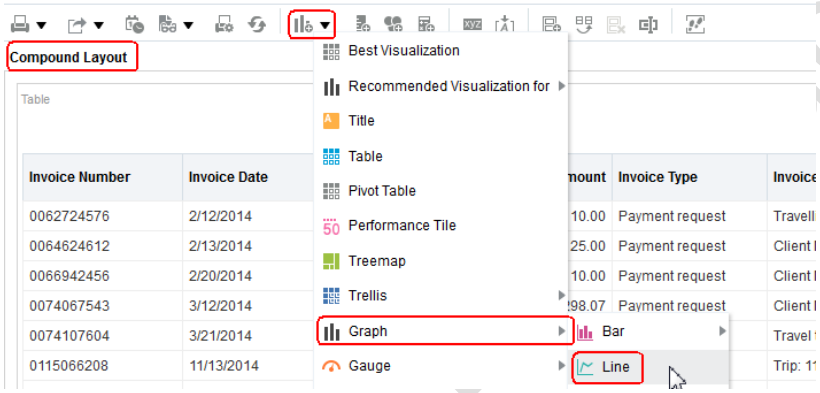
- Make a final check of the Filters



> Go to '**Results'** tab and check the data

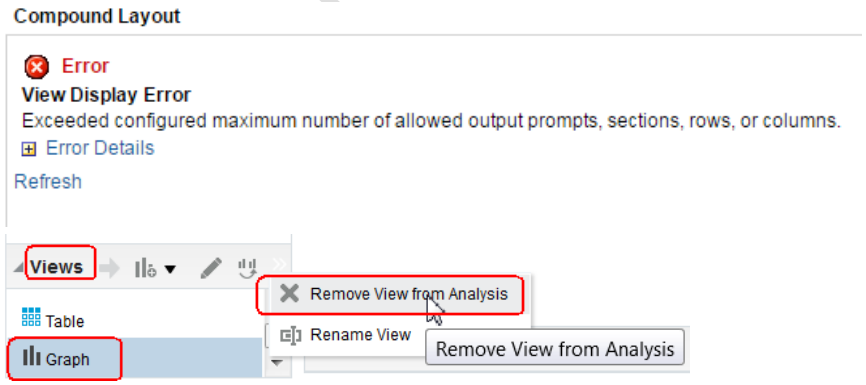


26. In the toolbar of the Views panel in the '**Results'** tab (bottom left), click the **New View** icon button and select **Graph** > **Line**.



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



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.

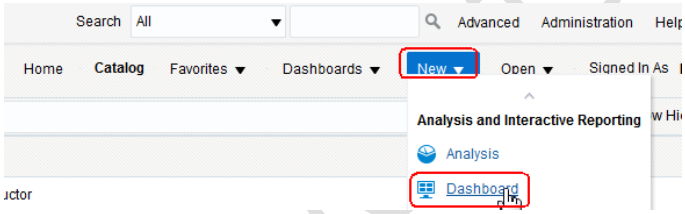
Assumptions

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

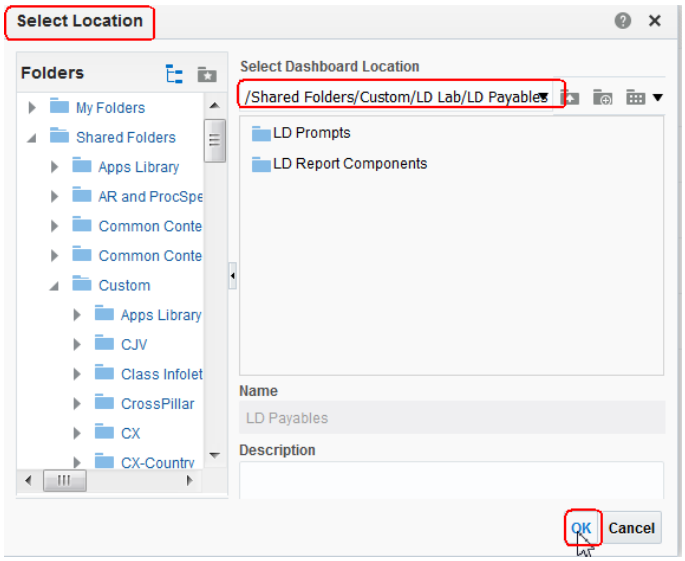
Tasks

Create Dashboard

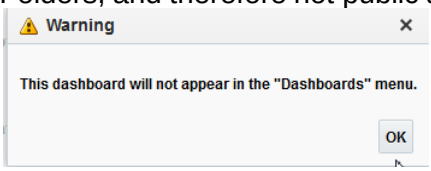
1. **Navigate to: Tools > Reports and Analytics**.
2. Click the **Browse Catalog** icon button in the toolbar.
3. From the **New** menu, select **Dashboard**.



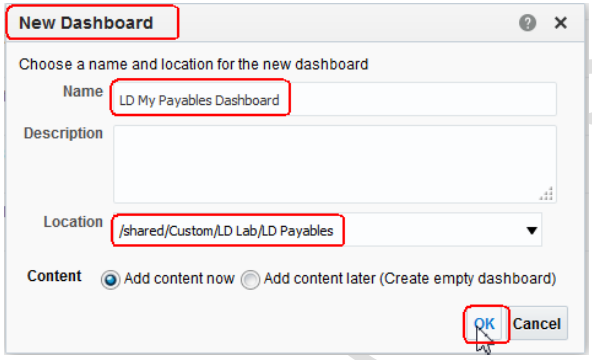
4. Enter **XX My Payables Dashboard** as the name for the dashboard.
5. For the location, select the **XX Payables** folder in **Shared Folders > Custom.**
6. Click **OK**.



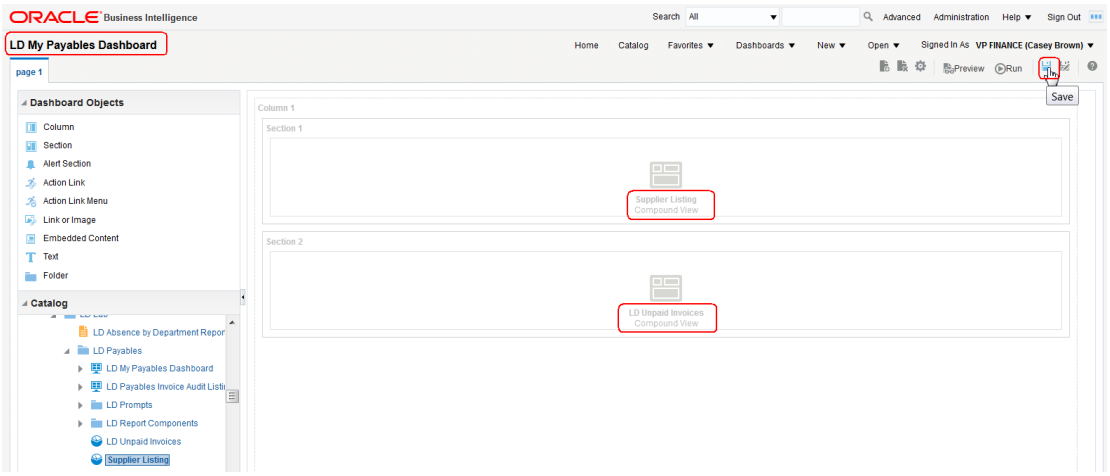
7. Dismiss the warning. The warning appears because the dashboard is to be saved in My Folders, and therefore not public and available in the list of dashboards.



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

.

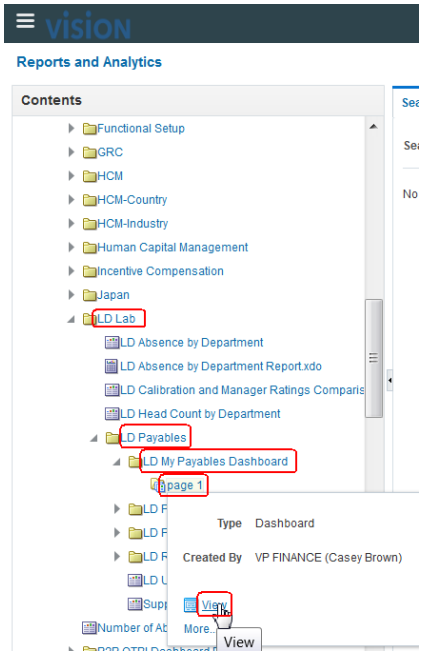
15. In the Folders panel, go to **Shared Folders > Custom > XX Payables** and select your dashboard

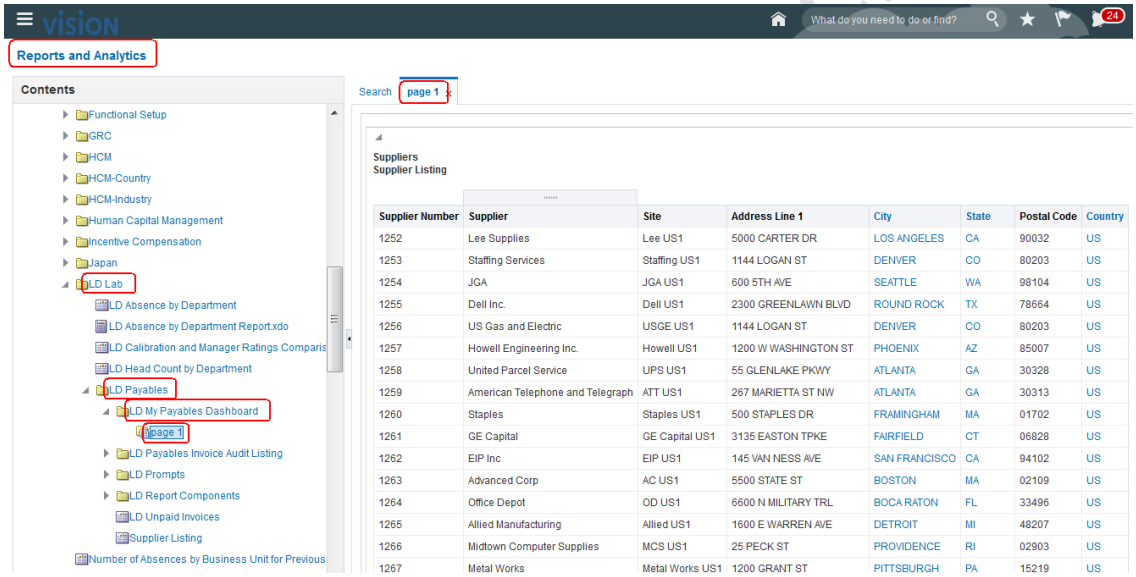
16. Click the **More** link and select **Rename**.

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.



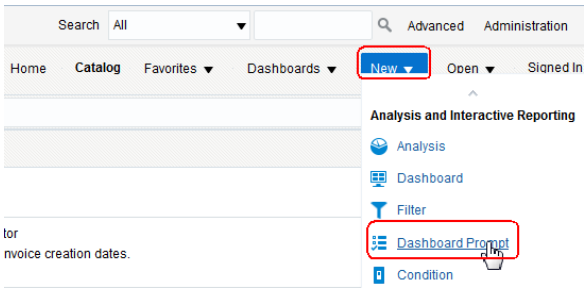


Supplier Number	Supplier	Site	Address Line 1	City	State	Postal Code	Country
1252	Lee Supplies	Lee US1	5000 CARTER DR	LOS ANGELES	CA	90032	US
1253	Staffing Services	Staffing US1	1144 LOGAN ST	DENVER	CO	80203	US
1254	JGA	JGA US1	600 5TH AVE	SEATTLE	WA	98104	US
1255	Dell Inc.	Dell US1	2300 GREENLAWN BLVD	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 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

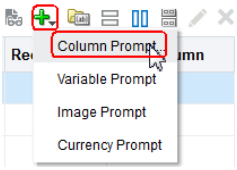
Note: The Name column in the screen shot is now **Supplier**.

Create Dashboard Prompt

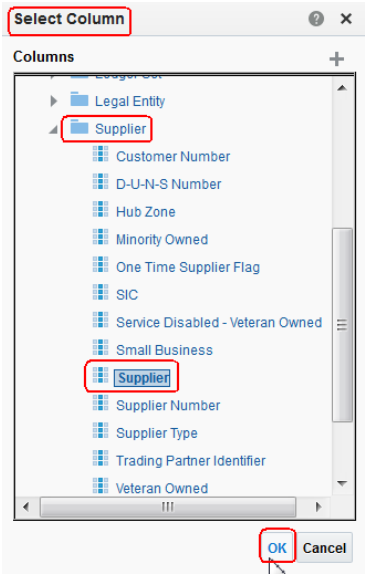
20. Click the **Browse Catalog** icon button in the Reports and Analytics work area.
21. From the **New** menu, select **Dashboard Prompt**.



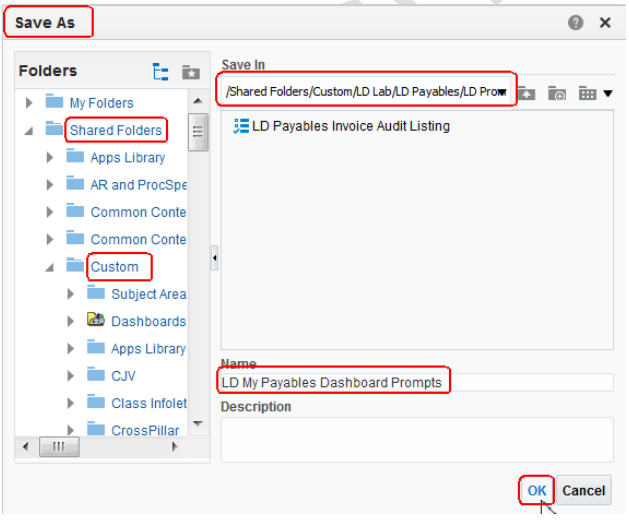
22. Select the **Payables Invoices - Transactions Real Time** subject area.
23. In the Definition region, click the **New** icon button and select **Column Prompt**.



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

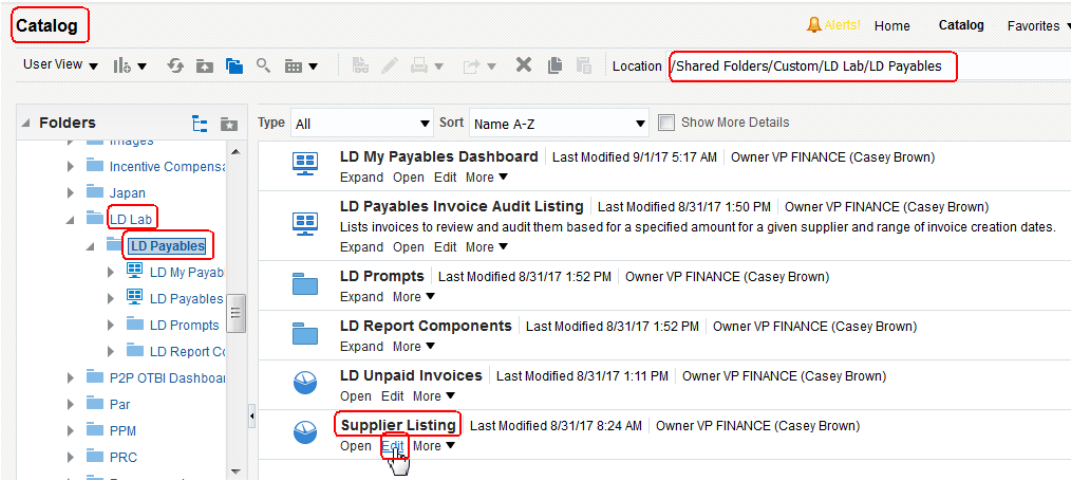


25. Click the **Save Prompt** icon button .
26. In the Folders panel, go to **Shared Folders > Custom** > **XX Payables** > **XX Prompts**.
27. Enter **XX My Payables Dashboard Prompts** in the **Name** field.
28. Click the **OK** button.

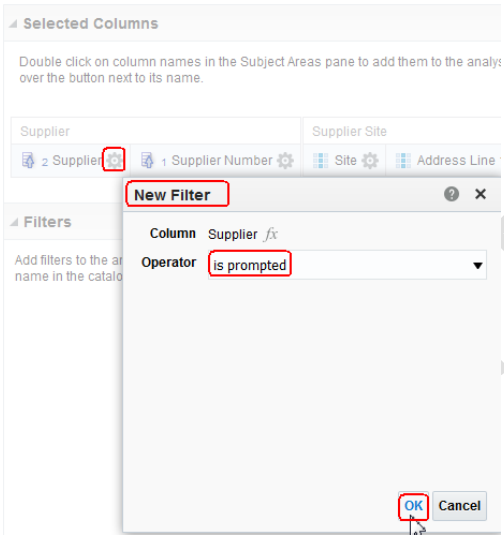


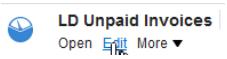
Add Filters

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.

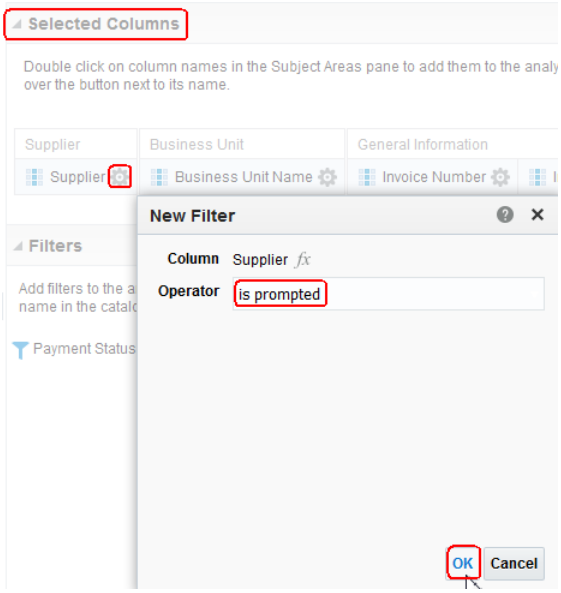


32. Select the **Criteria** tab.
33. In the **Selected Columns** section, for the **Supplier** column, open the contextual menu and select **Filter**.
34. In the **Operator** field, select **is prompted**.
35. Click the **OK** button.



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 

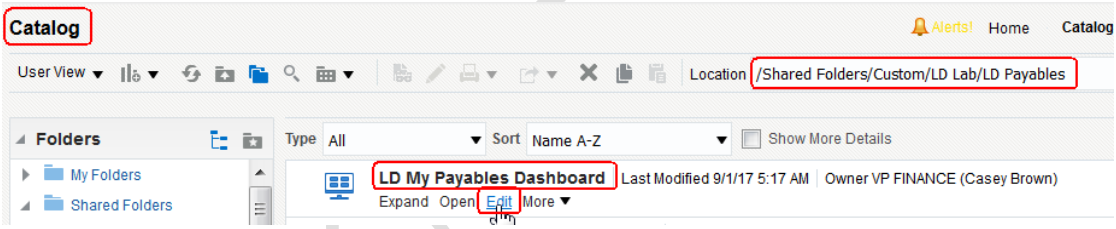
.
40. Select the **Criteria** tab.
41. In the Selected Columns section, for the **Supplier** column, open the contextual menu and select **Filter**.
42. In the **Operator** field, select **is prompted**.
43. Click the **OK** button.



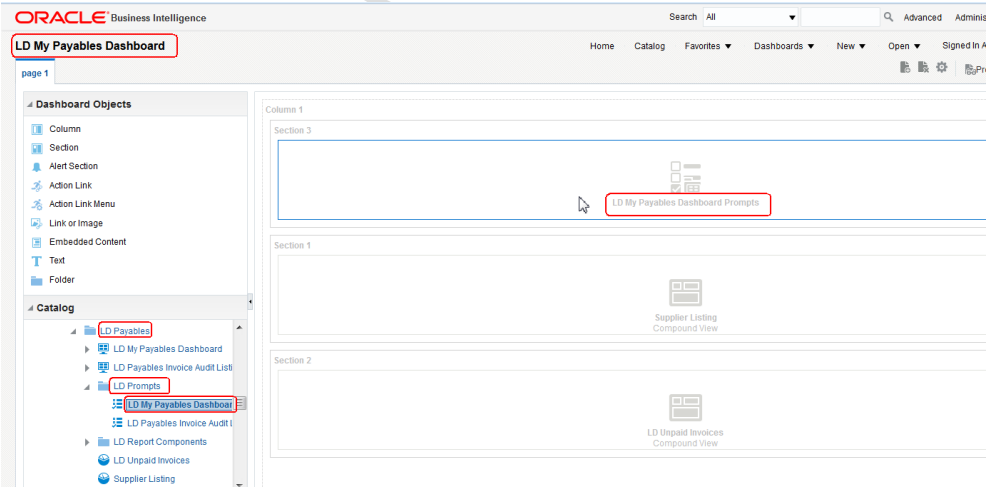
44. Click the **Save Analysis** icon button .

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**.



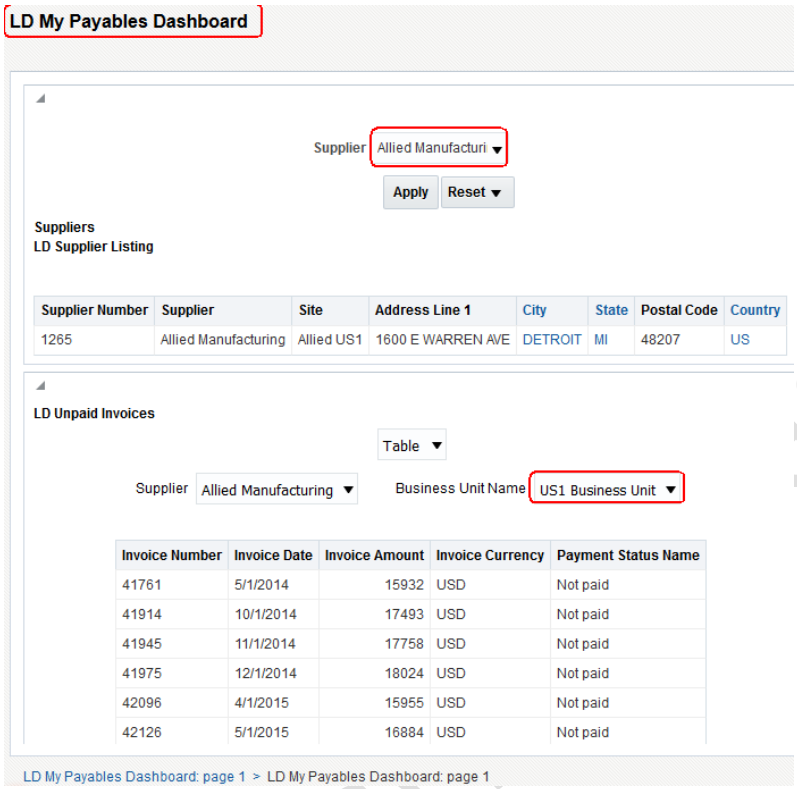
48. In the Catalog panel, go to **Shared Folders > Custom** > **XX Payables** > **XX Prompts**.
49. Select the **XX My Payables Reports dashboard prompt** and drag it above the Section 1 region.



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.



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

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

Goals

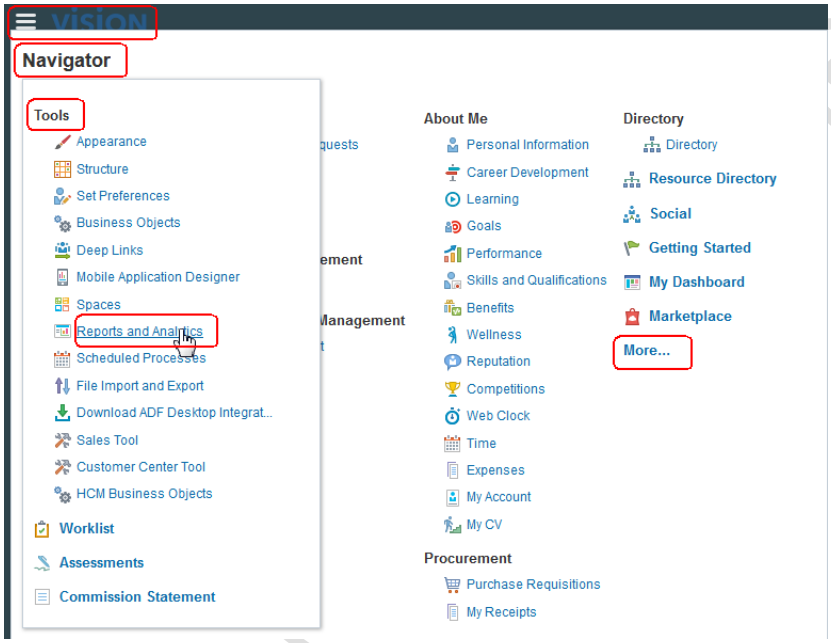
- Access an Oracle Sales Cloud report
- Observe a variety of report formats

Overview

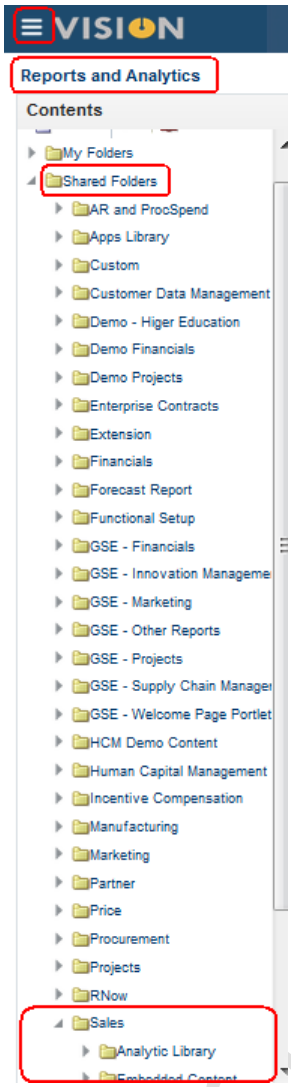
In this practice you will generate reports from the report catalog.

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**.

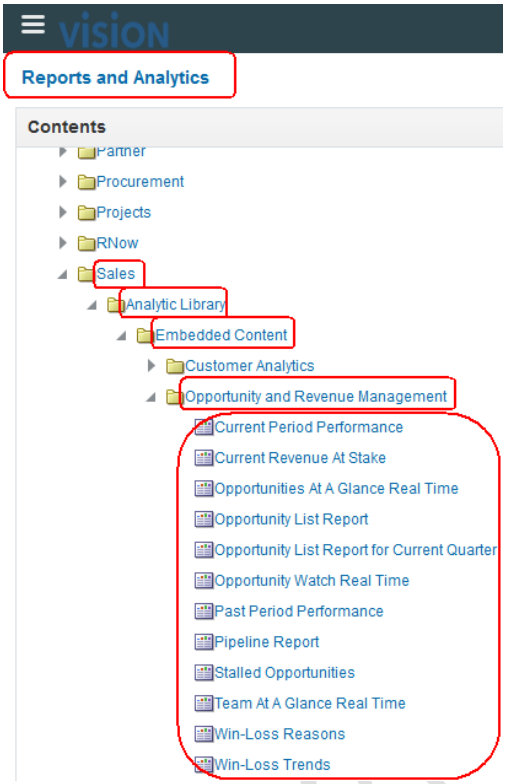


   b. In the regional area, expand **Shared Folders**.
   c. Expand **Sales**. You may need to scroll down in the Contents area to see sales.


VISION
Reports and Analytics
Contents
My Folders
Shared Folders
AR and ProcSpend
Apps Library
Custom
Customer Data Management
Demo - Higer Education
Demo Financials
Demo Projects
Enterprise Contracts
Extension
Financials
Forecast Report
Functional Setup
GSE - Financials
GSE - Innovation Manageme
GSE - Marketing
GSE - Other Reports
GSE - Projects
GSE - Supply Chain Manage
GSE - Welcome Page Portlet
HCM Demo Content
Human Capital Management
Incentive Compensation
Manufacturing
Marketing
Partner
Price
Procurement
Projects
RNow
Sales
Analytic Library

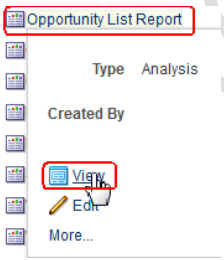
d. Expand **Analytic Library** > **Embedded Content** > **Opportunity and Revenue Management**.

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



e. Click **Opportunity List Report**.

f. Click View.

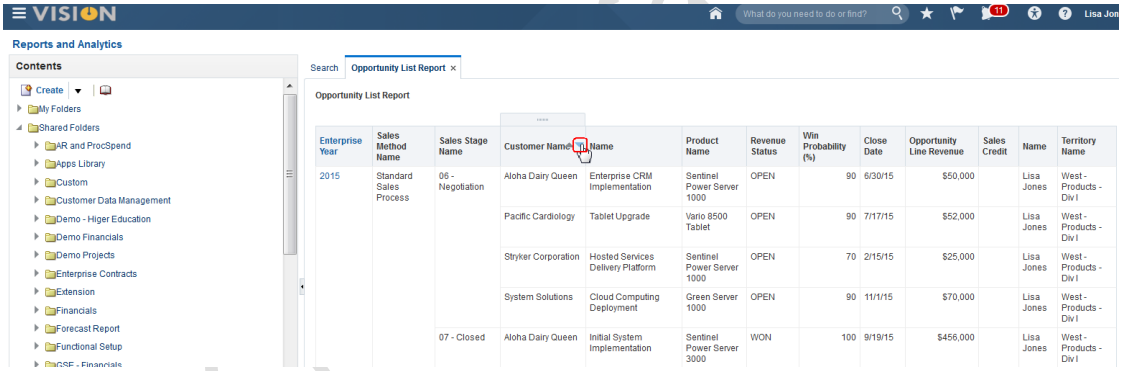


g. In the local area, notice that a new tab labeled "**Opportunity List Report**" is created.

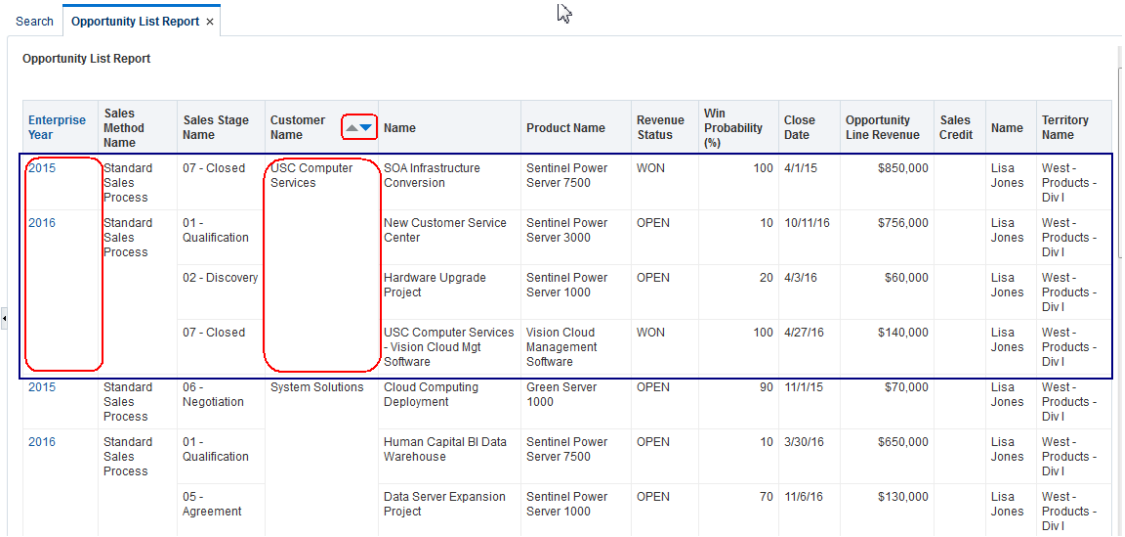
h. After a few moments, observe that a tabular report with opportunities grouped by year, Sales Method, Sales Stage, and Customer is shown.

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.



   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.

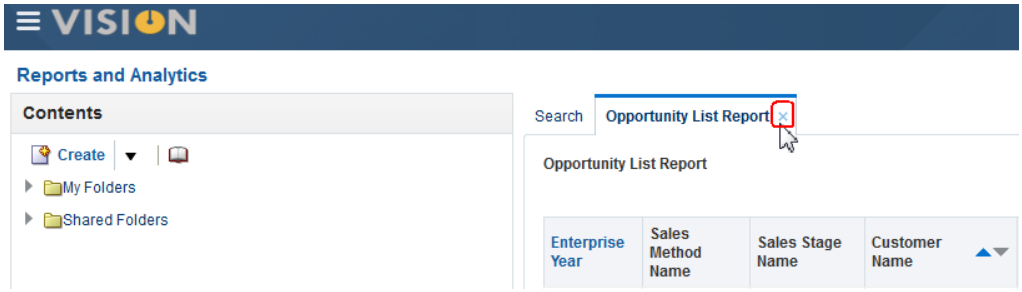


Enterprise Year	Sales Method Name	Sales Stage Name	Customer Name	Name	Product Name	Revenue Status	Win Probability (%)	Close Date	Opportunity Line Revenue	Sales Credit	Name	Territory Name
2015	Standard Sales Process	07 - Closed	USC Computer Services	SOA Infrastructure Conversion	Sentinel Power Server 7500	WON	100	4/1/15	$850,000		Lisa Jones	West - Products - Div I
2016	Standard Sales Process	01 - Qualification		New Customer Service Center	Sentinel Power Server 3000	OPEN	10	10/11/16	$756,000		Lisa Jones	West - Products - Div I
		02 - Discovery		Hardware Upgrade Project	Sentinel Power Server 1000	OPEN	20	4/3/16	$60,000		Lisa Jones	West - Products - Div I
		07 - Closed		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**.

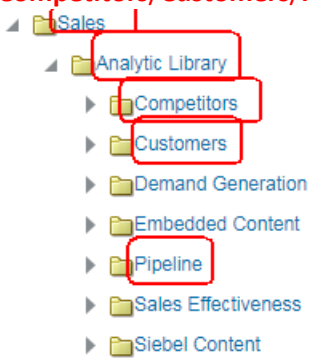
g. Restore the table to its original order by sorting **Customer Name** in ascending order.

h. Close the **Opportunity List Report** tab.



Note:

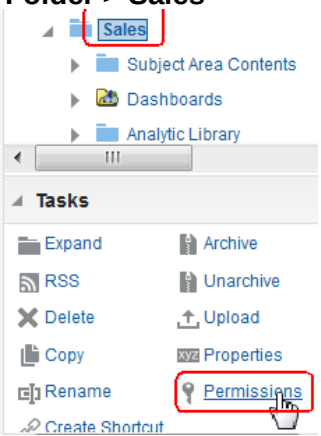
Before go to the next lab please check: Shared Folders/Sales/Analytic Library and check for folders: **Competitors/Customers/Pipeline**

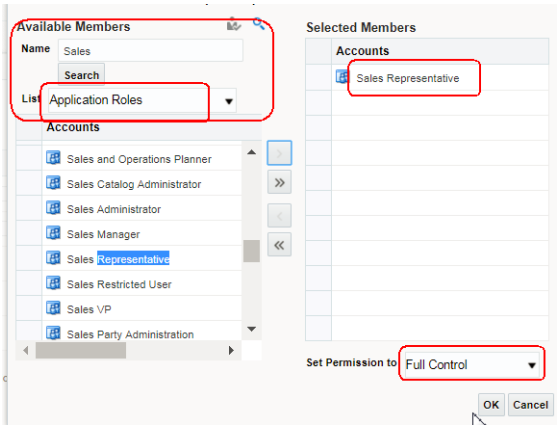


If the folders are missing, then you might need to import the whole **Analytic Library** folder from this location or just check if you see the folders with your **FASxx.Student**
https://beehiveonline.oracle.com/content/dav/Oracle/Oracle_Business_Intelligence_Cloud_Service_Training_Workspace_FY18/Documents/OTBI/Labs/Files/Analytic%20Library.catalog

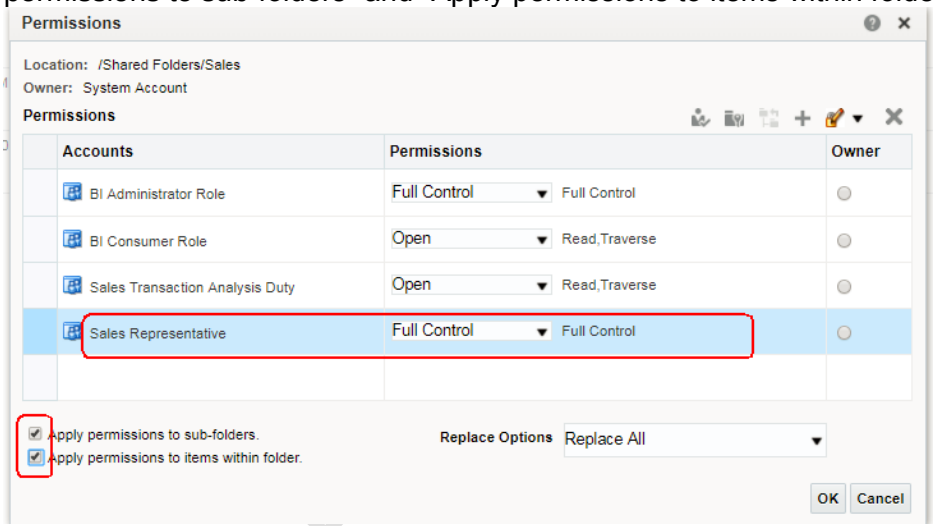
Lisa Jones doesn't have the unarchive privilege, so you are going to login as your **FASxx.Student**:

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



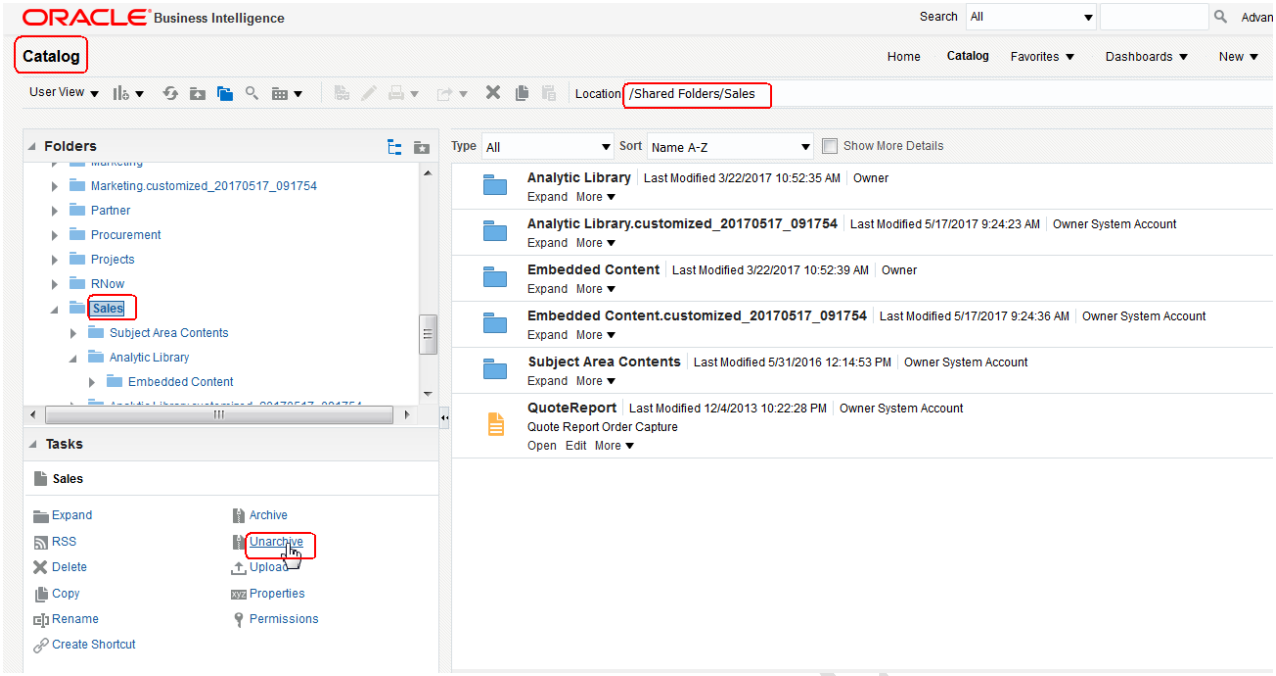


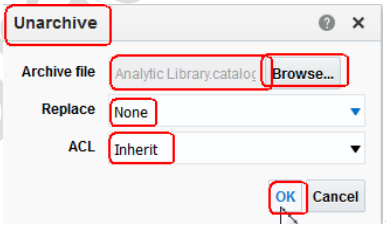
- Check the default permissions
- Add "**Sales Representative role**" permission to "**Full Control"** and also **check** "Apply permissions to sub-folders" and "Apply permissions to items within folder"



- 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**





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

4. Generate a bar graph report.

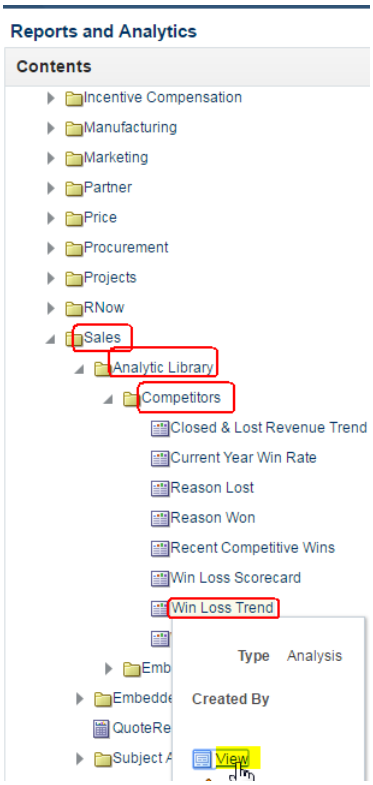
Sign in to the application using **Lisa.Jones** login > Go to **Reports and Analytics**

/Shared Folders/Sales/Analytic Library/Competitors

a. In the regional area, under **Sales** > **Analytic Library** > **Competitors**

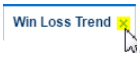
b. Click **Win Loss Trend**.

c. Click **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.

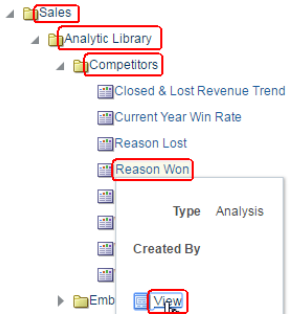
f. Close the **Win Loss Trend** tab 

.

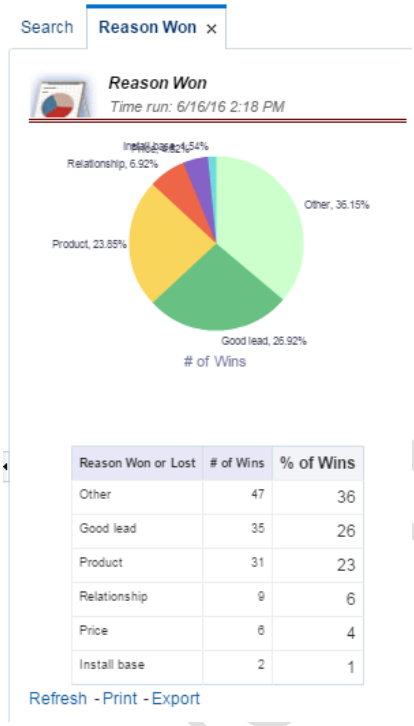
5. Generate a pie chart report.

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

b. Click **View**.



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



Reason Won or Lost	# of Wins	% of Wins
Other	47	36
Good lead	35	26
Product	31	23
Relationship	9	6
Price	6	4
Install base	2	1

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

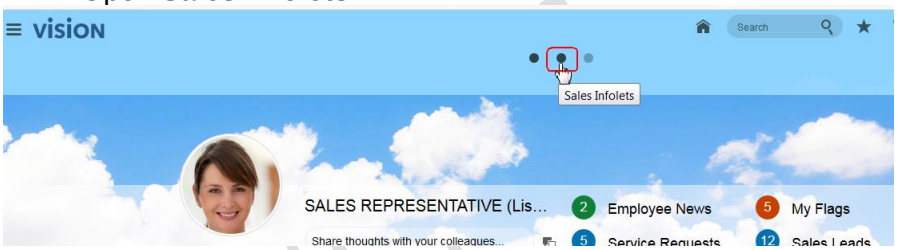
This is an **optional** practice. If you are pressed for time or believe that you understand this content, please skip this practice.

Tasks

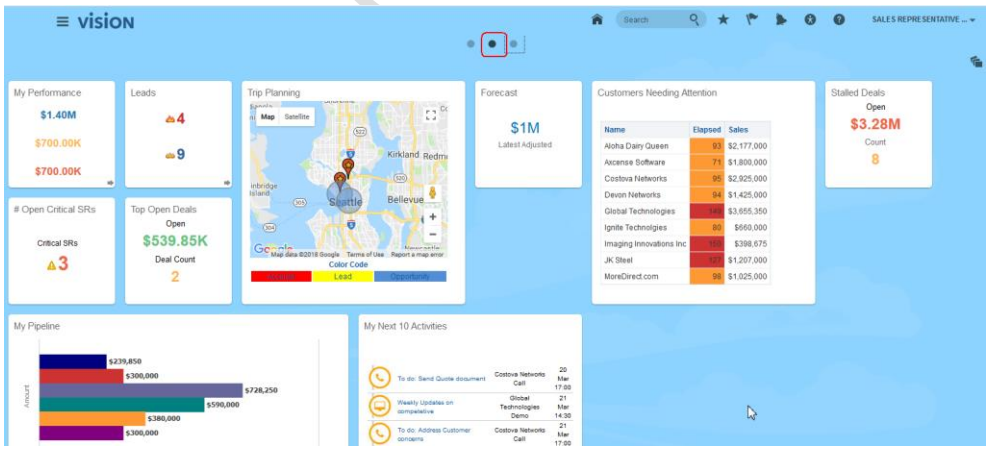
1. Sign out of the application.
2. Sign in again as Lisa Jones with User ID = **lisa.jones**.

   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.

4. 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

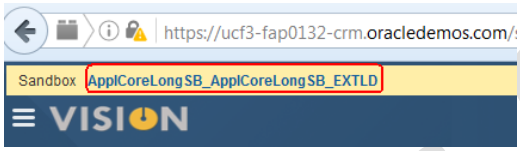
Overview

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

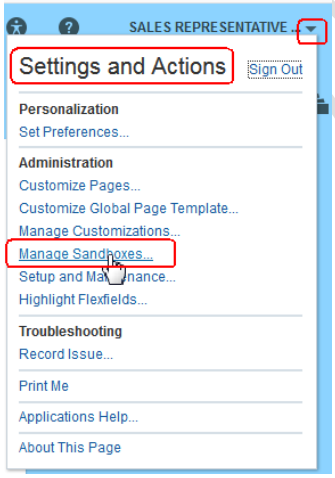
The method is identical if you are creating custom reports to put in an infolet: You first create a report that displays a performance tile (a Performance Tile Report), then a report to display when the user drills down on the tile. Once these reports are saved, you follow the techniques in this practice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

Tasks

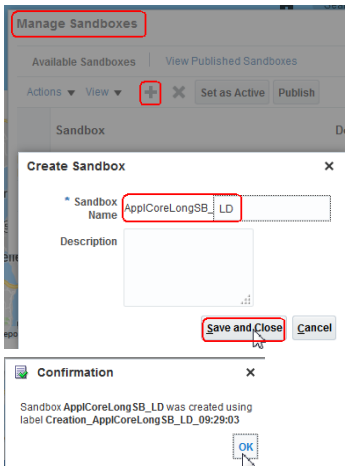
1. Verify that you are in a sandbox.
   a. At the top of the page, check for a sandbox tag.



   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.

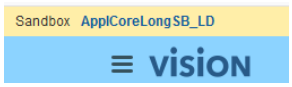


      3) Select the sandbox ApplCoreLongSB_**EXT*nn***, where *nn* is your student initials. If you do not see this sandbox, create it. **Actions** > **New**



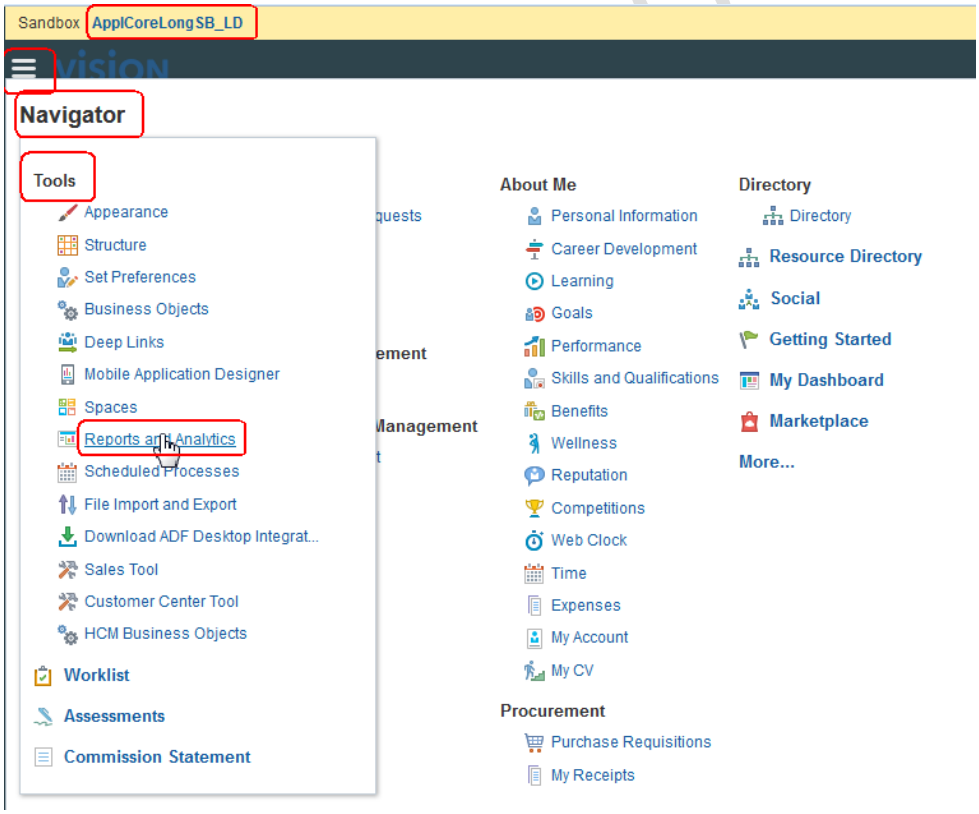
4) Click **Set as Active**
.

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



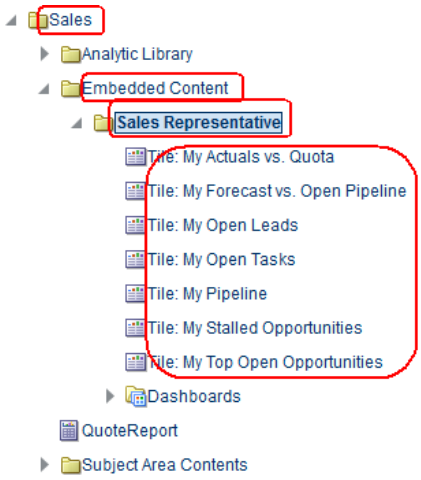
2. Select a performance tile report for your infolet.

   a. **N**avigate 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.

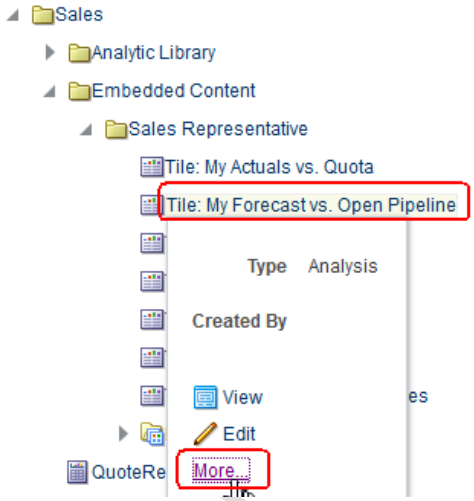


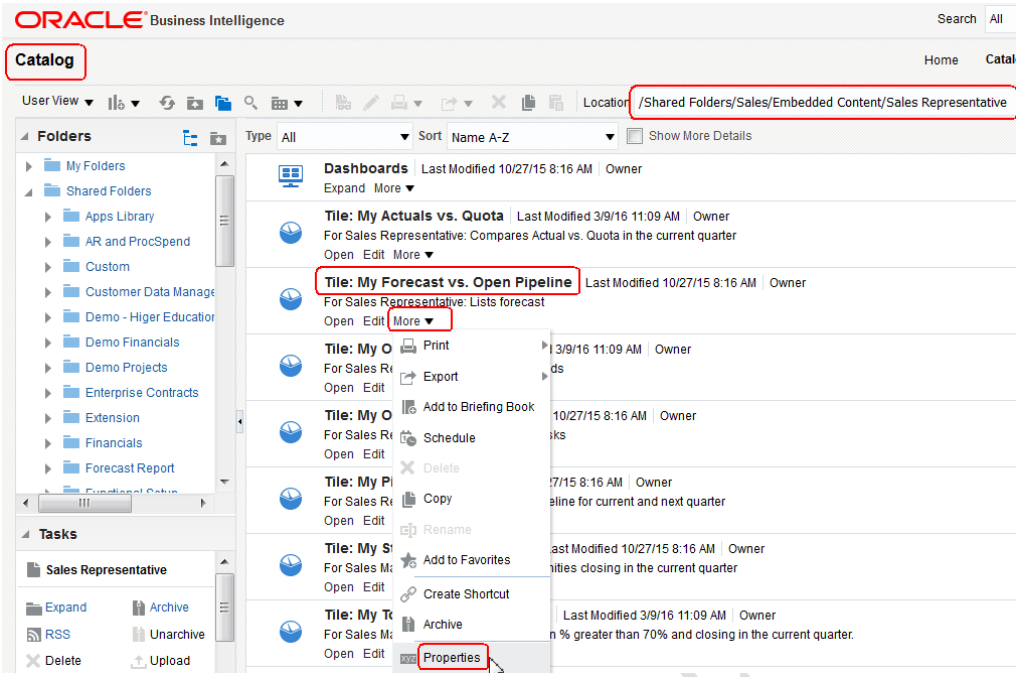
d. Notice the number of tile reports already available to sales representatives. You will replace the existing forecast infolet.

e. **Select** Tile: **My Forecast vs. Open Pipeline**.

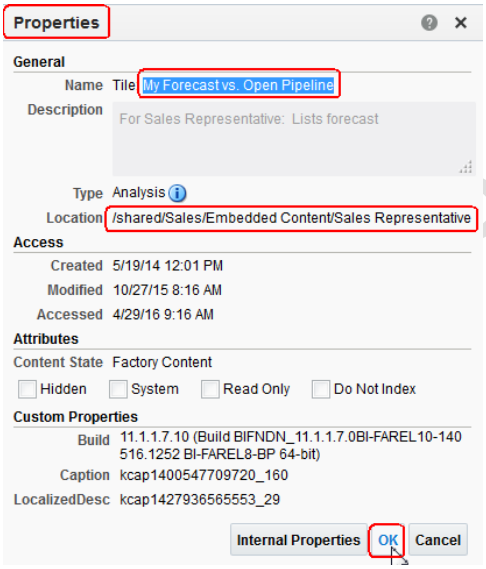
f. Click **More**. A new browser tab for Oracle Business Intelligence opens.

g. In the local area, under Tile: **My Forecast vs. Open Pipeline**, select **More** > **Properties**.





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



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.

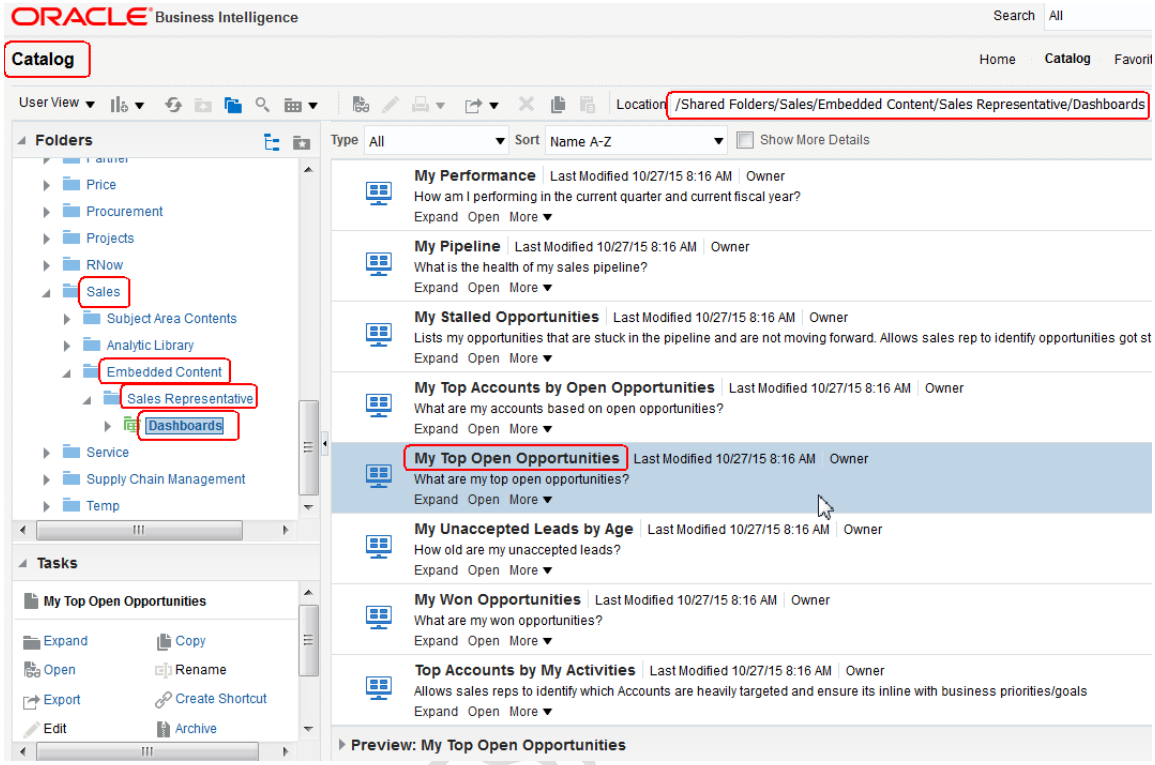
i. Click Cancel.

3. Select a detail report for your infolet.

a. In the regional area, expand Sales Representative.

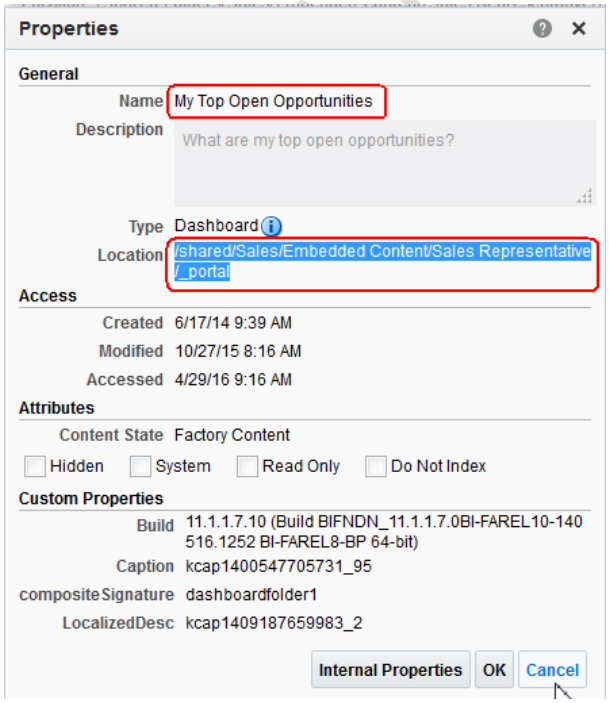
b. Expand **Dashboards**

c. Select **My Top Open Opportunities**.



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.



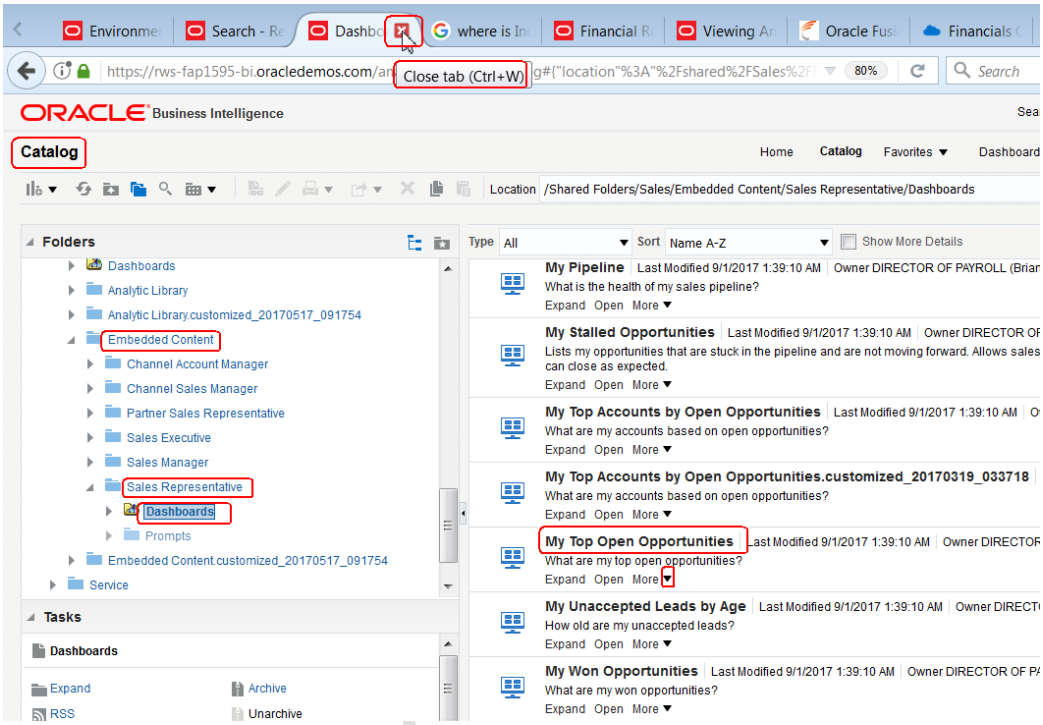
Name: **My Top Open Opportunities**

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

f. Click Cancel.

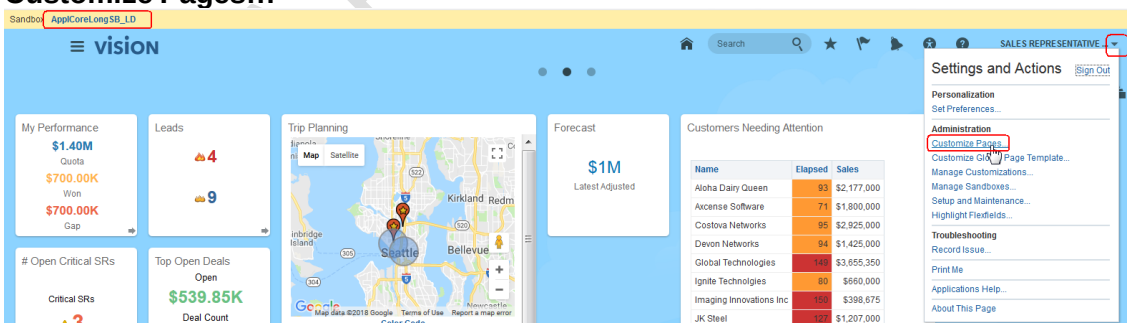
4. Add the infolet.

a. Close the Oracle Business Intelligence tab.



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.

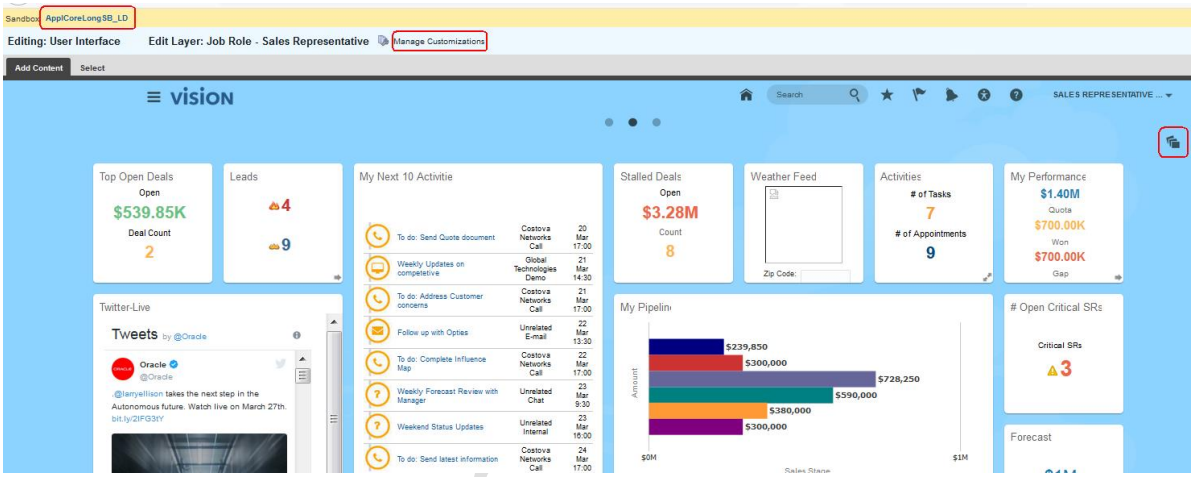
c. At the top of the page, expand the drop-down under Lisa.Jones and select **Customize Pages…**



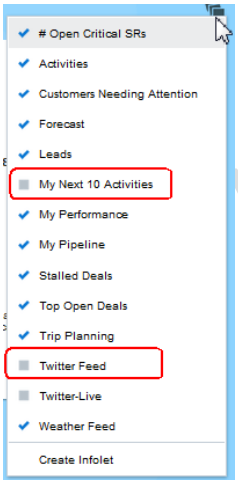
d. Set Edit Job Role = **Sales Representative**.

e. Click **OK**.

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



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

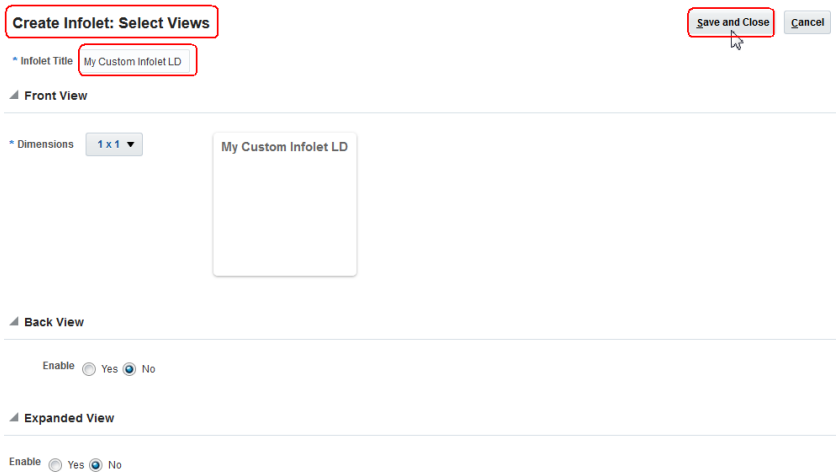


The dashboard page is configured to optimally display **only 6/7 infolets**. This is intentional, as this should be a "quick overview" page that allows a user to quickly scan information of importance to him or her. If your requirements require additional analytics content, consider adding that content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

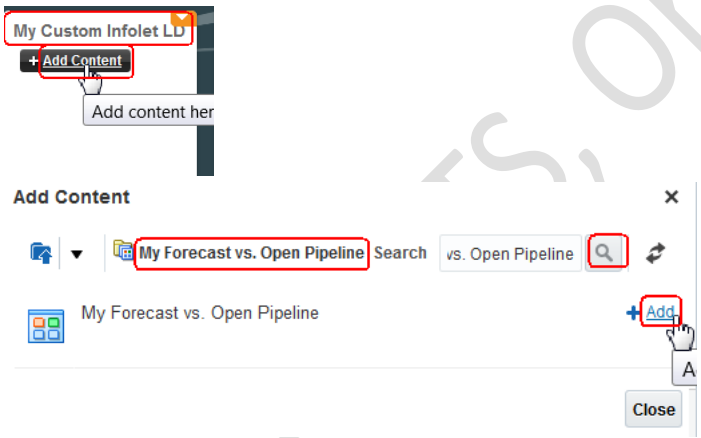
i. Click the **Infolet Repository** > **Create Infolet** 

.

ii. Add **Infolet Title My Custom Infolet nn** (where nn is your student initials)



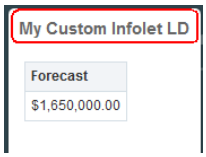
j. In the Add Content dialog, in the Infolet row, click Add.



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

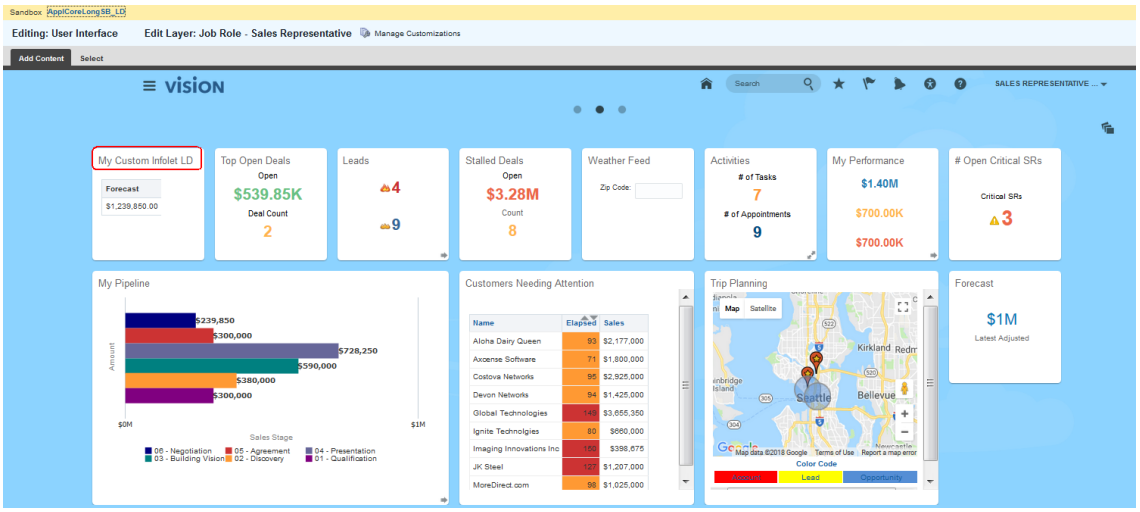
k. Click Close.

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 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

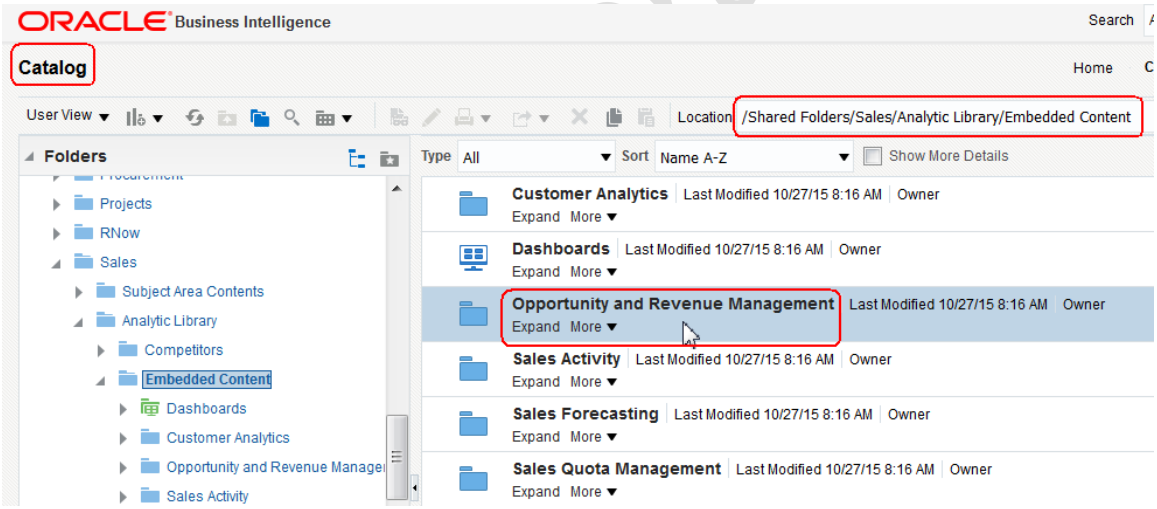
- Add a new report to the analytics page

Overview

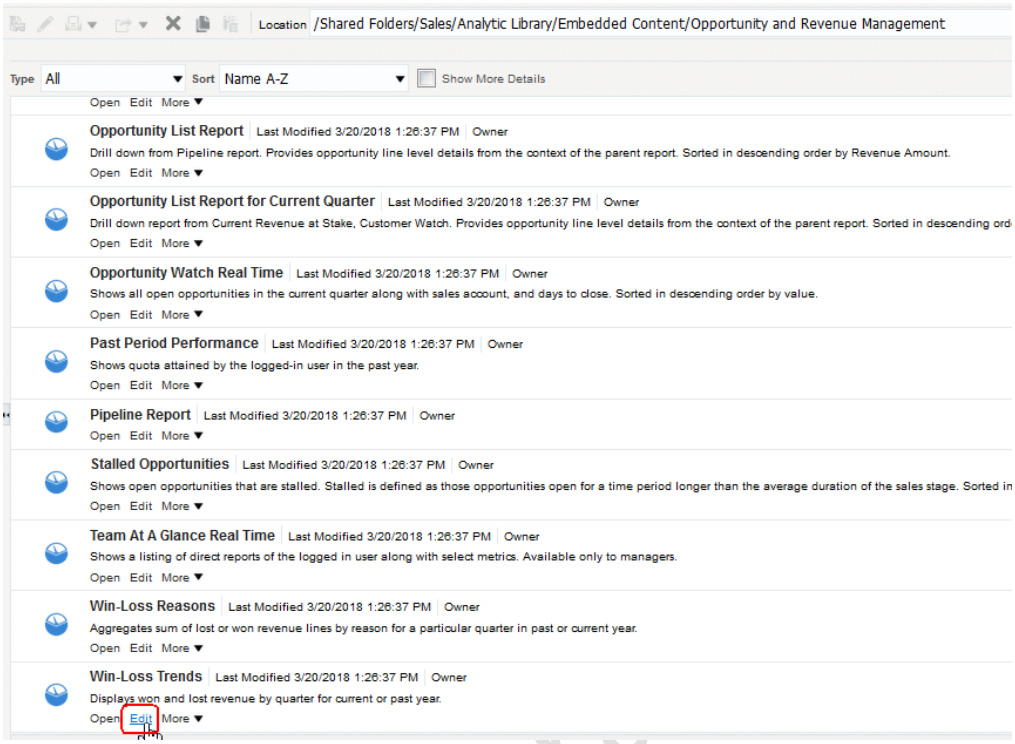
In this practice, you will review an existing report, adjust its display options, and save it as a custom report. You will then add the report as a favorite on the analytics page.

Tasks

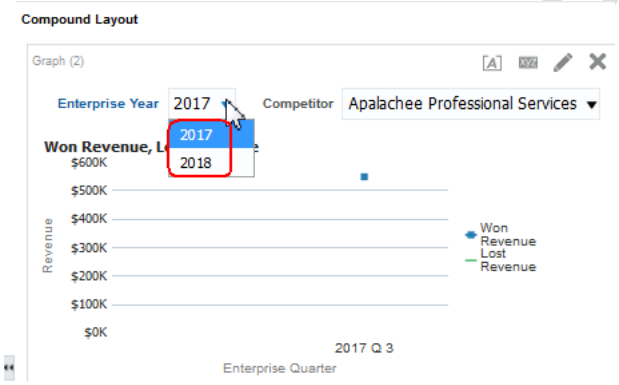
1. Examine and modify the report you will be using for this practice.
   a. Navigate to **Reports and Analytics**.
   b. In the regional area, click the Browse Catalog icon. This opens a new Oracle Business Intelligence tab.
   c. In the regional area, expand **Shared Folders**.
   d. Expand **Sales**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



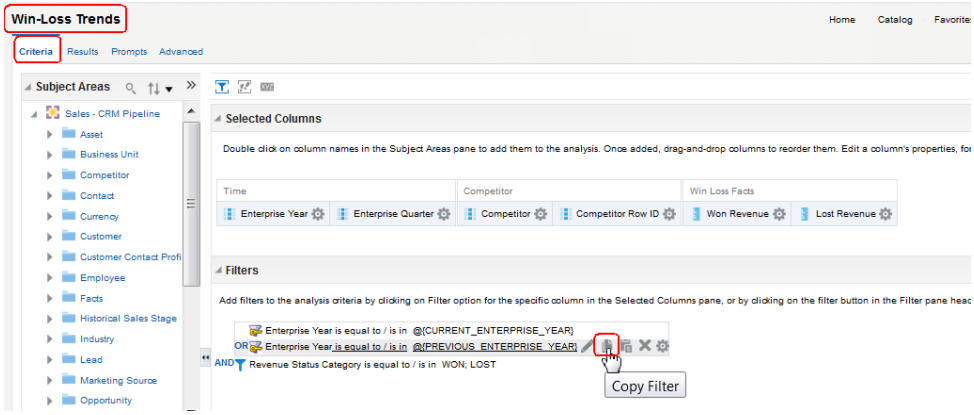
   f. Notice the large number of available opportunity and revenue reports.
   g. In the local area, locate the **Win-Loss Trends** report. You may need to scroll down.
   h. Examine the existing report.
      1) Under **Win-Loss Trends**, click **Open**.
         You may receive no data in the initial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

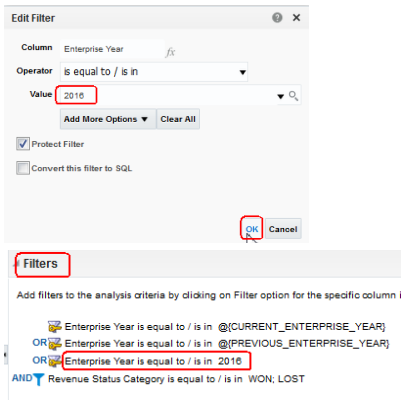


2) Notice that you can select the Enterprise Year for the report.
Notice you have just 2017/2017 years available in selection



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



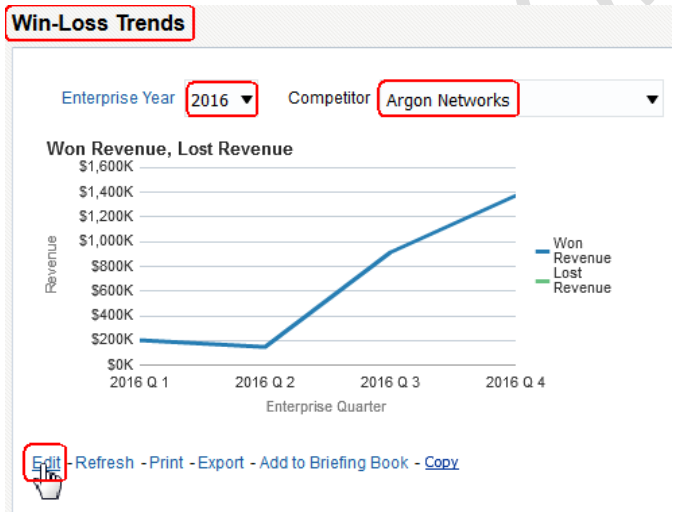


4) Notice that you can select a competitor against whom to review win-loss trends.
5) If necessary, set Competitor = **Argon Networks**.
6) Notice that your graph now contains data;

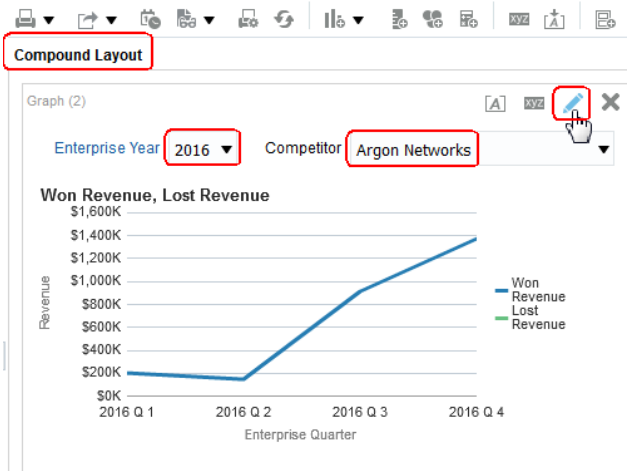
   This could be an indicator of a very successful marketing strategy, a competitive new feature, or enhanced competitive sales training. An executive reviewing this graph might want to investigate further to determine what caused the upswing, and whether it might be successful against other competitors.

i. Make a visible modification to the report.

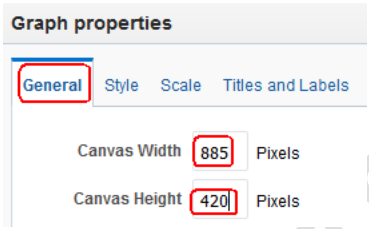
1) In the lower left below the report, click Edit.



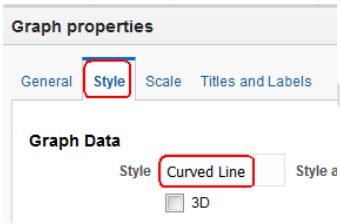
2) Once again, set Enterprise Year = **2016** and Competitor = **Argon Networks**.
3) Notice that the report is a compound layout; the top section takes user parameters (year and competitor) and the bottom section displays the graph.



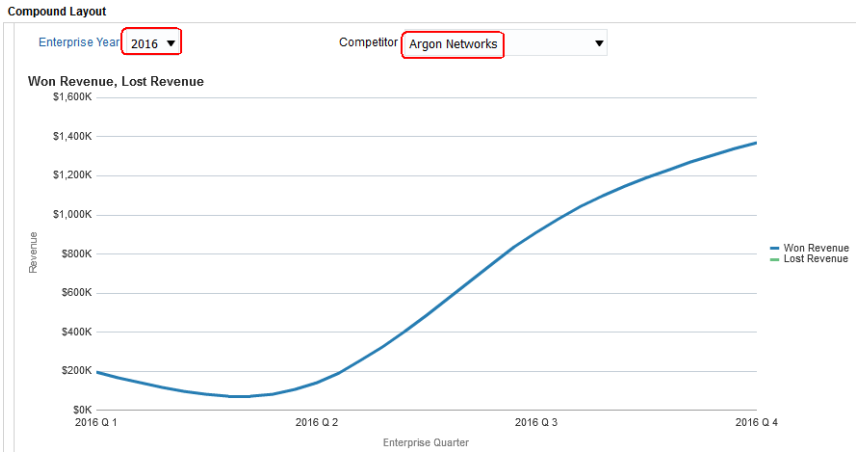
4) In the upper right of the report, click the View Properties  icon.
5) Verify that the **General** tab is selected.
6) Set Canvas Width = 885.
7) Set Canvas Height = 420.
   These settings will provide a much larger graph.



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

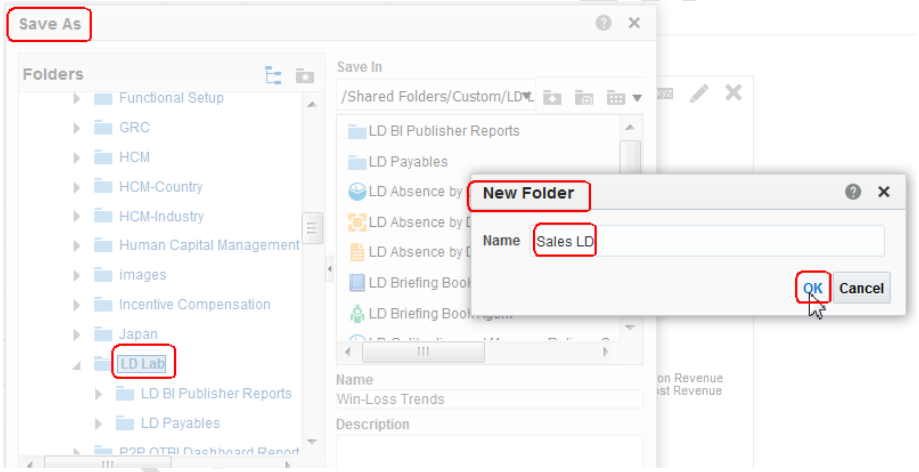


10) Click **OK**.
11) Notice that the graph is much larger, and is now curved.

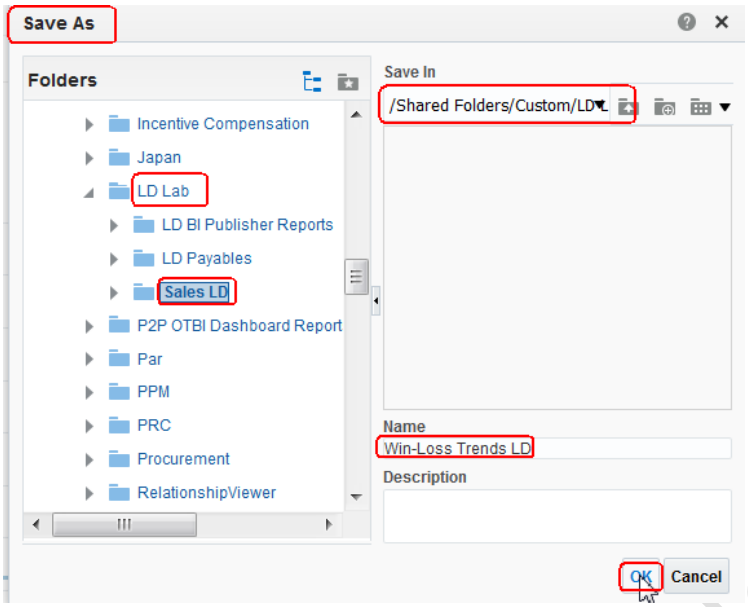


j. **Save** the custom report.

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.

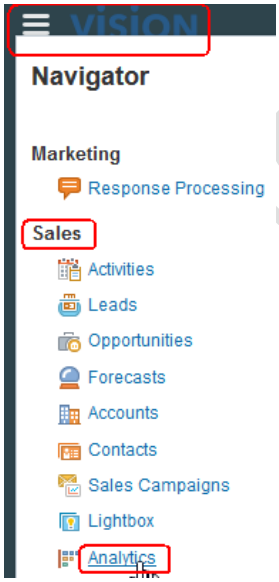
k. Close the Oracle Business Intelligence browser tab.

2. Examine how the default analytics page displays reports.

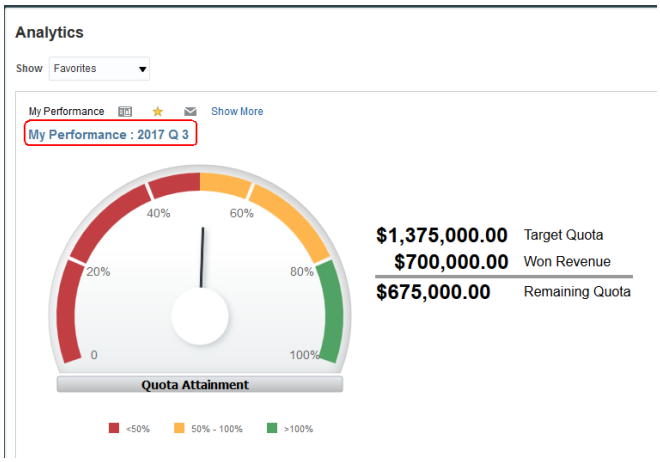
a. Return to the Oracle Sales Cloud application.

b. Click the **Home** icon to return to the simplified home page.

c. Click **Navigate** and then click **Analytics** icon under **Sales**.



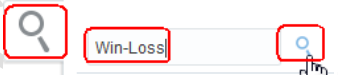
d. Notice that favorites listed.



e. Add some reports as favorites.

1) In the upper right, click the List View icon.

2) Click the Search icon .

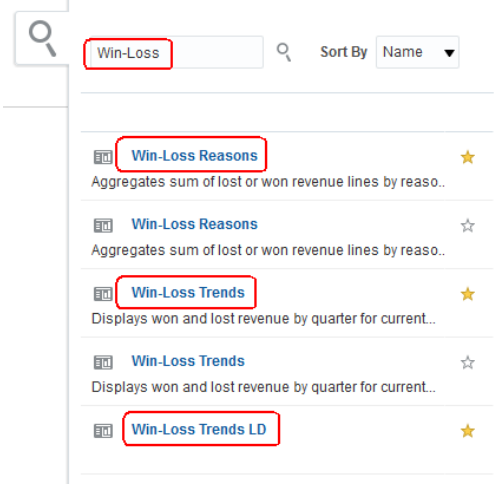
3) Enter **Win-Loss** and click the smaller Search icon 

.
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)



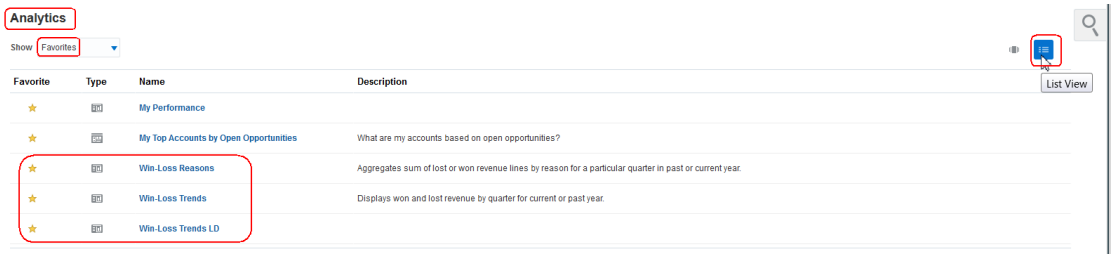
6) Click the Search icon to close the search pane.

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.

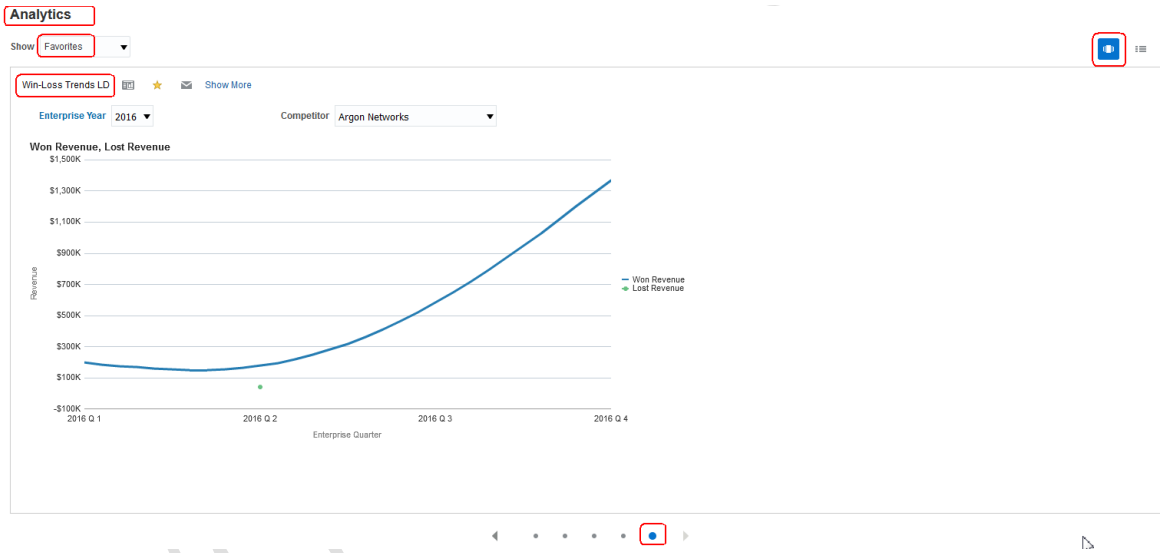


11) Click Done.

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

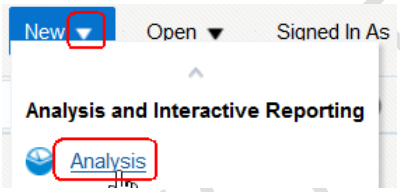
Overview

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.

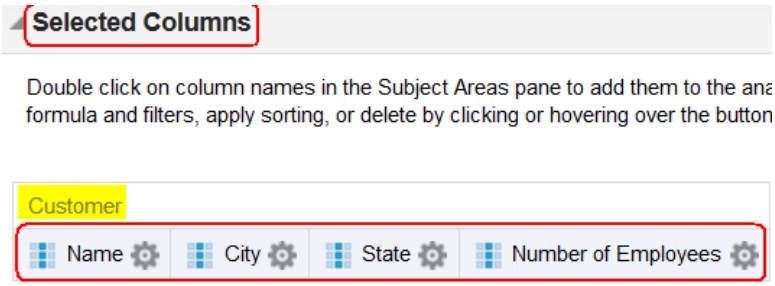
   An analysis allows you to select a subject area and columns from that subject area in order to build reports.
   a. Above the regional area, click the **New** drop-down and select Analysis.



   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.

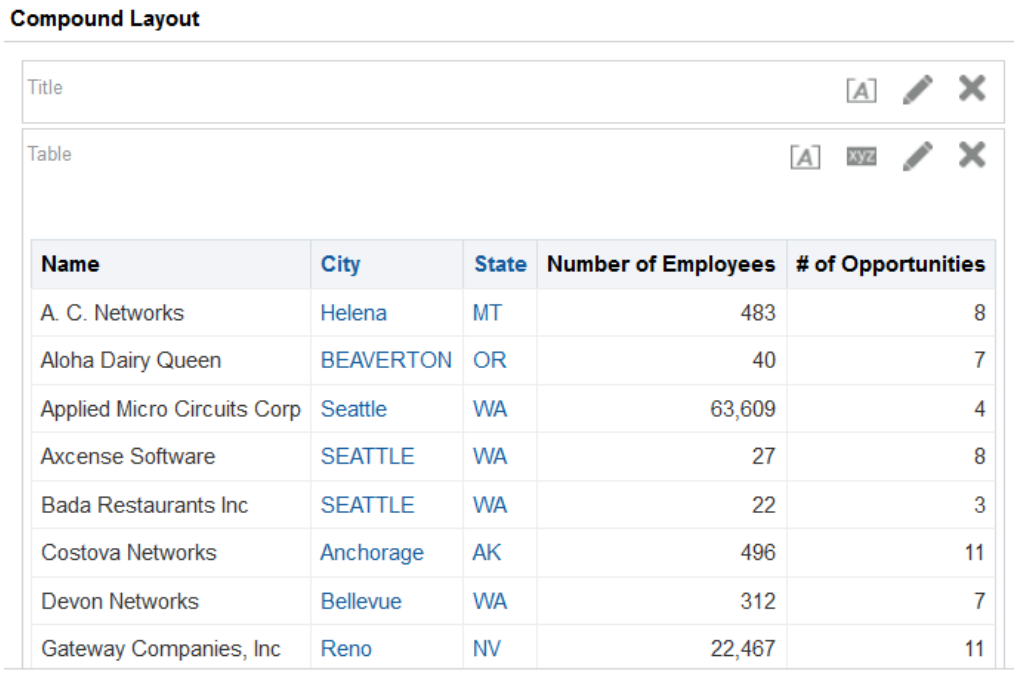


e. In the regional area, collapse **Customer**.

f. Expand **Facts** > **Pipeline Facts** to display the available fields.

g. Double-Click **# of Opportunities**.

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



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 .

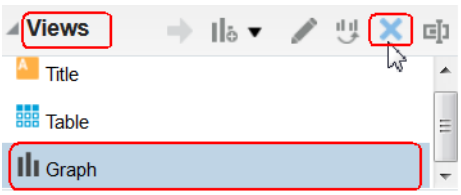
This lists the available methods for viewing the data. b. Select **Graph > Bar > Vertical**.

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 G**raph**.

e. Click the **Delete** icon. You will not keep this graph.

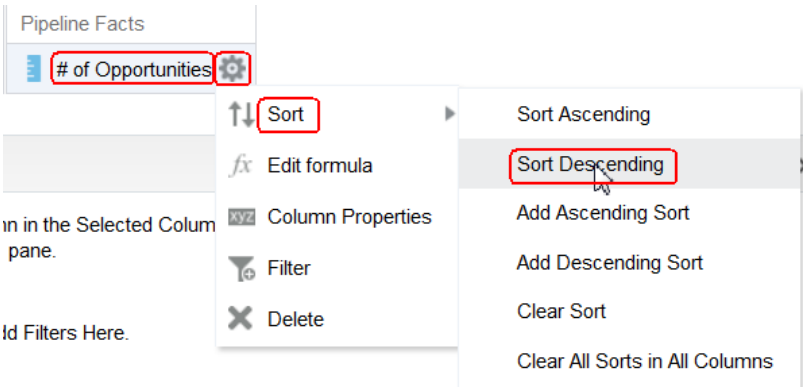


5. Set the sort order.

   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**.

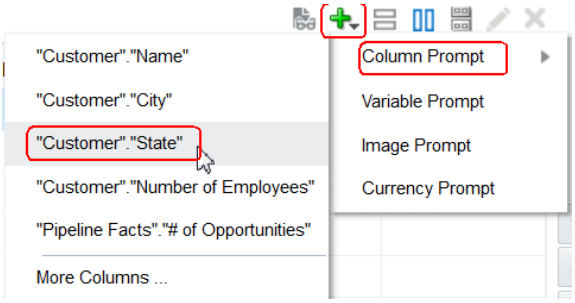


   This makes the report sort on number of opportunities rather than customer name.

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**".

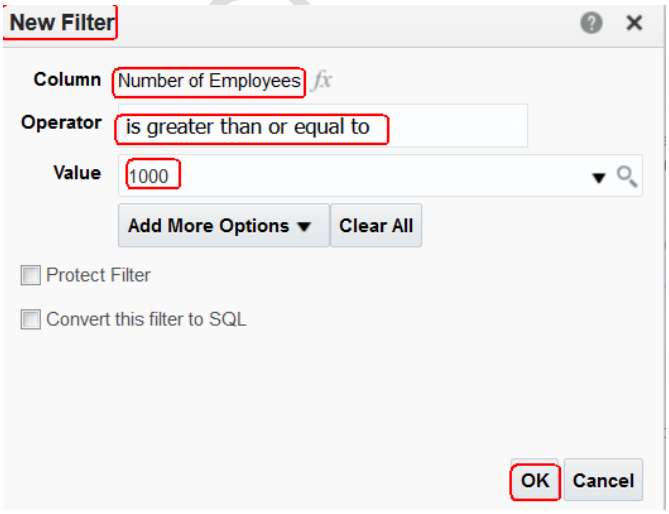


d. Click **OK** to accept the default label.

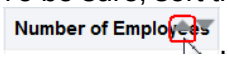
7. Add a filter to limit the results.
   a. At the top left, click the **Criteria** tab.
   b. In the local area, in the Filters section, click the "Create a filter for the current Subject Area" icon to expand the drop-down.
   c. Select "**Number of Employees**."
   d. In the New Filter pop-up, set:

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:
   a. At the top left, click the Results tab.
   b. Verify that the report is listed in descending order by number of opportunities.
   c. 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

Title

Table

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.

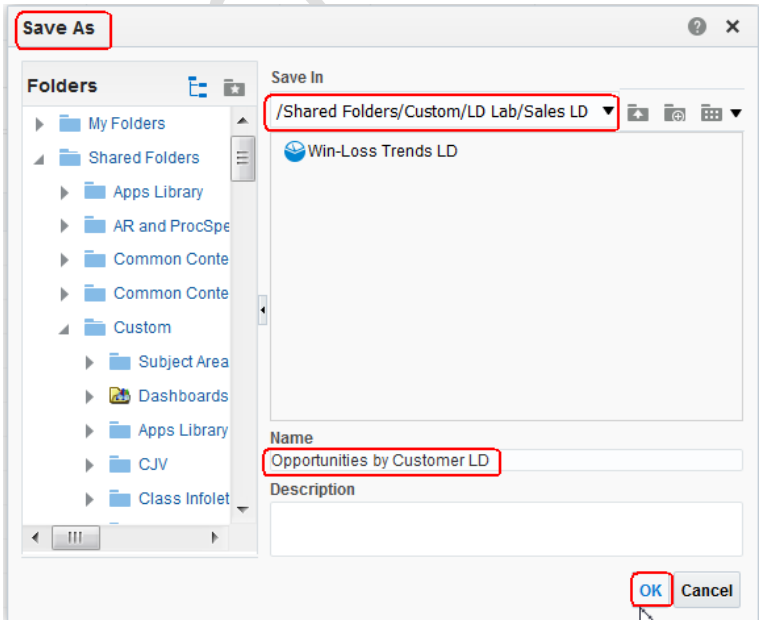
a. In the upper right, click the **Save Analysis** icon .

b. In the **Save As** dialog, in the Folders pane on the left, expand Shared Folders.

c. Expand **Shared Folders > Custom > XX Lab > Sales XX**.

d. 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.



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

f. Click **OK**.

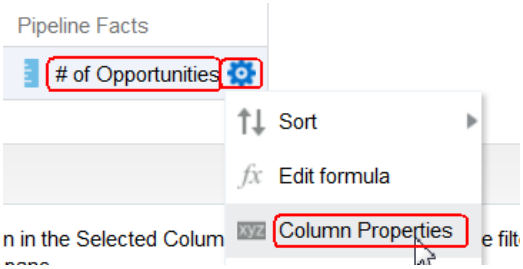
g. Verify that no error messages are displayed; that is, the report saves successfully.

10. Add conditional formatting using highlights to your report.

a. At the top left, click the **Criteria** tab.

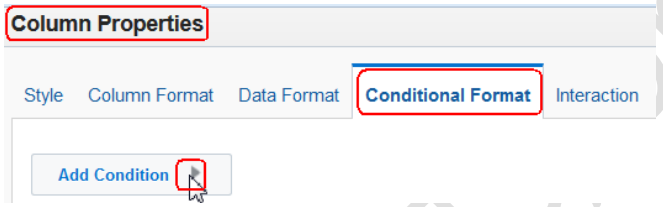
b. In the local area, to the right of **'# of Opportunities**' metric, mouse over the Options menu to expose the drop-down.

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

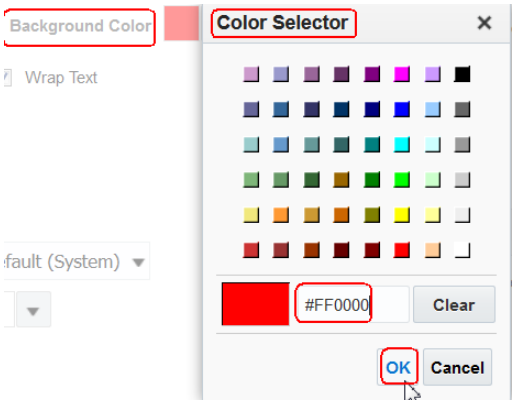
Operator	**is less than**
Value	**10**

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.



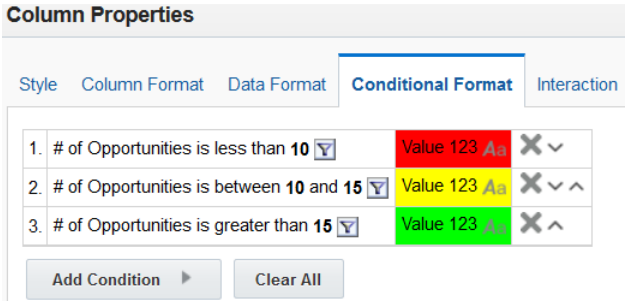
l. Click **OK** to close the Edit Format dialog.

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.

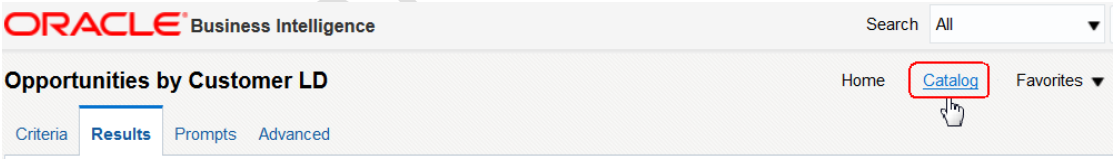
b. In **the # of Opportunities column**, sort descending.

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.

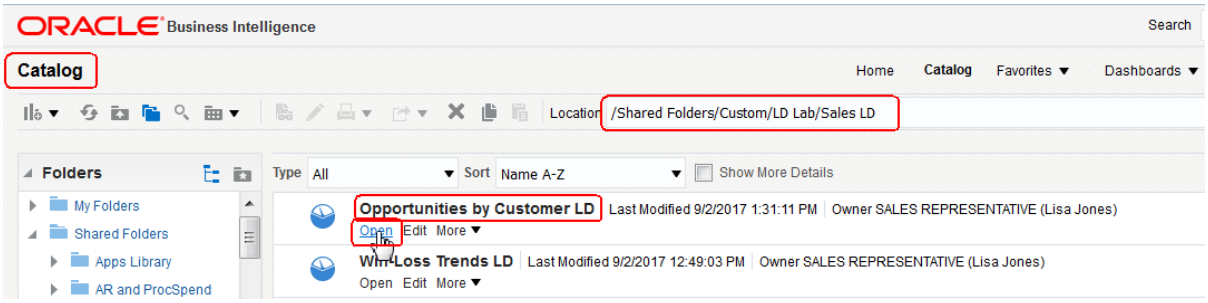
a. In the secondary application menu (the one below the top menu), click Catalog.



b. If necessary, in the regional area, navigate to **Shared Folders > Custom > LD Lab > Sale *nn***, where *nn* is your student initials.

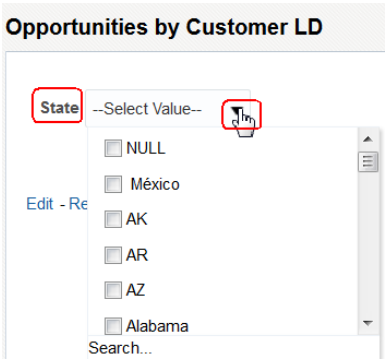
c. Verify that the **Opportunities by Customer *nn*** report appears in the local area on the right.

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.



g. Click **OK**.

h. Verify that your report appears.

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

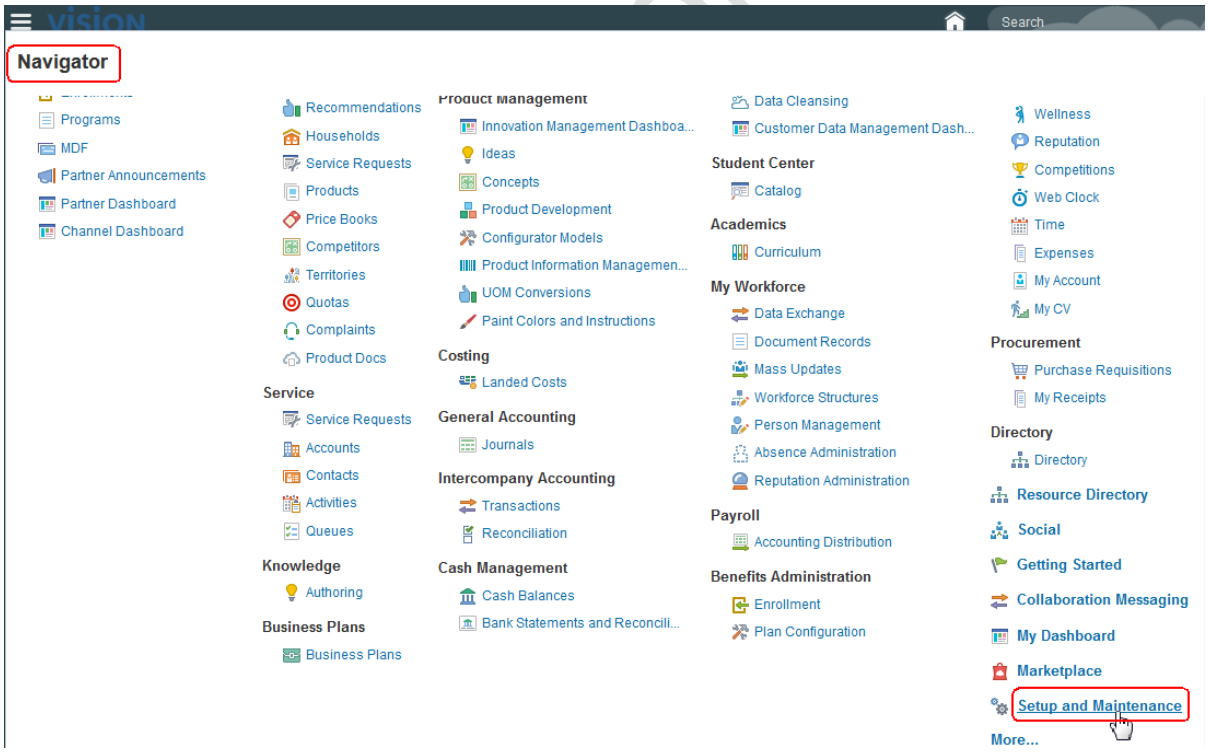
Overview

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.

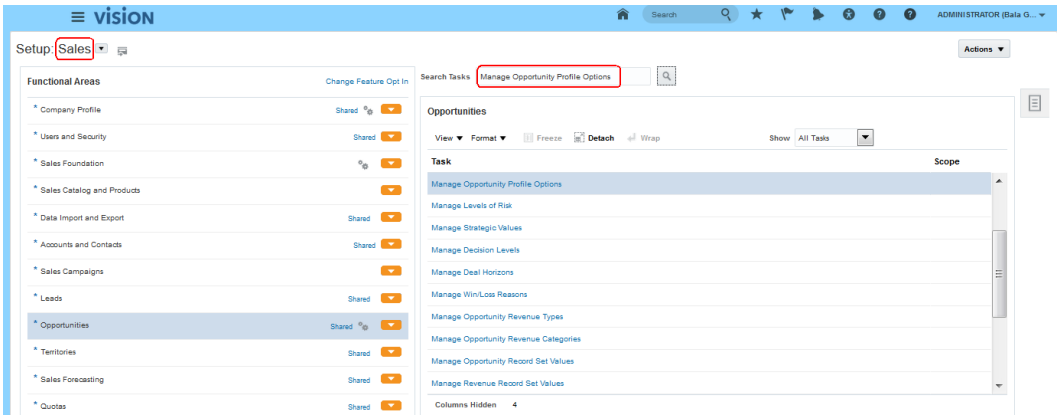
Sign in as Bala Gupta, user name **bala.gupta**

Tasks

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



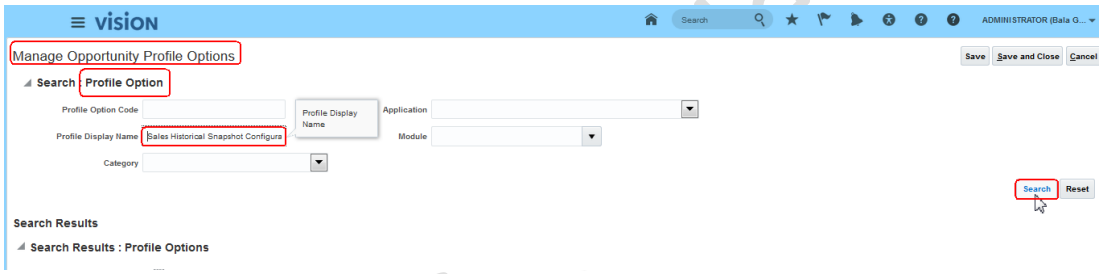
   b. Setup = **Sales** Set Name = **Manage Opportunity Profile Options**. c. Click **Search**



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**.

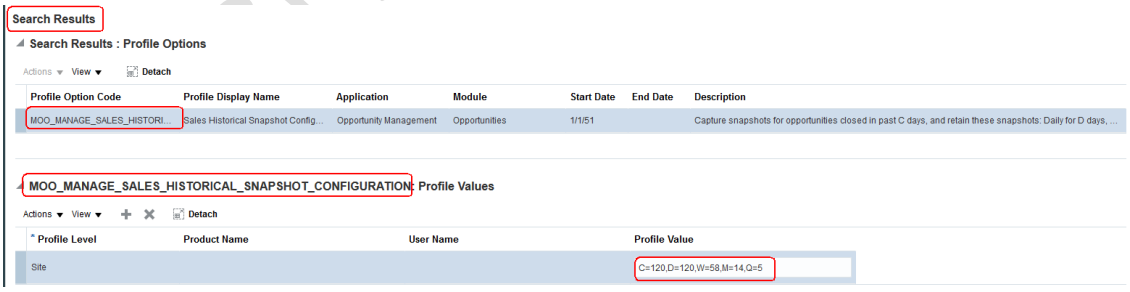
f. Click **Search**.



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 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:

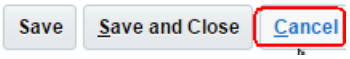
- **C**: Closed period (in days). Tells the system to create snapshots for opportunities closed within the last C days. This value must be greater than zero.
- **D**: Daily snapshots (in days): The number of days to retain daily snapshots. This value must be greater than zero.
- **W**: Weekly snapshots (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.

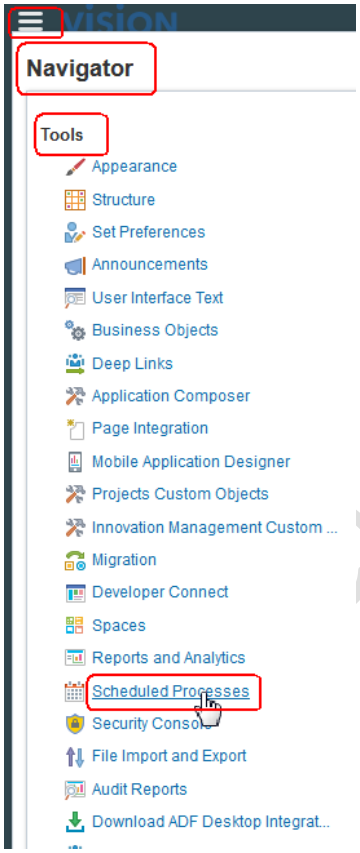
Note: The snapshot process only supports capturing snapshots if the enterprise calendar is configured to be either a month- or week-based calendar. No other calendar period frequencies are supported. It is a prerequisite to set up the enterprise calendar before using historical snapshots.

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.

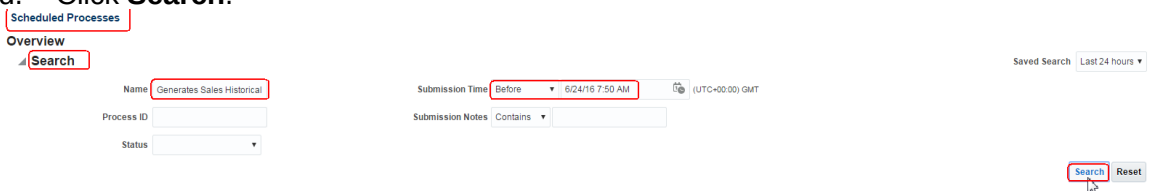
a. Navigate to **Tools** > **Scheduled Processes**.



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

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

d. Click **Search**.



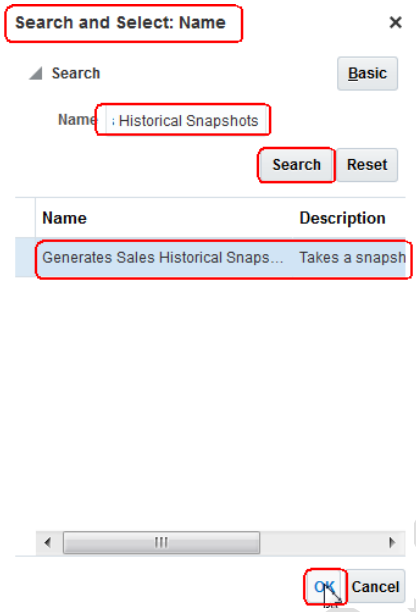
f. Verify that at least one record is returned, indicating that historical snapshot data has

been generated.

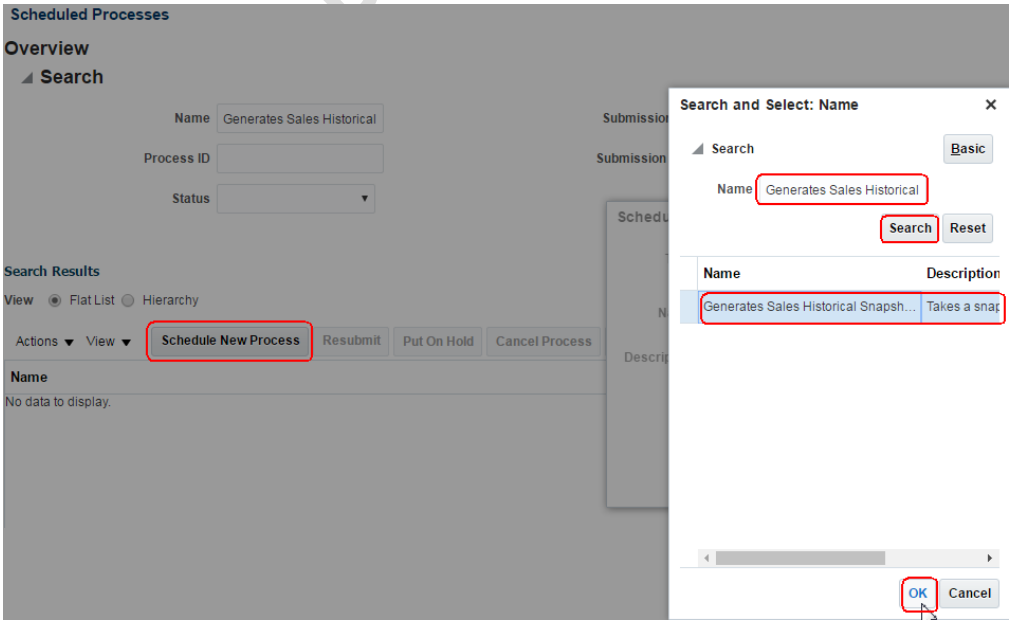
h. If the job has not been run:

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.

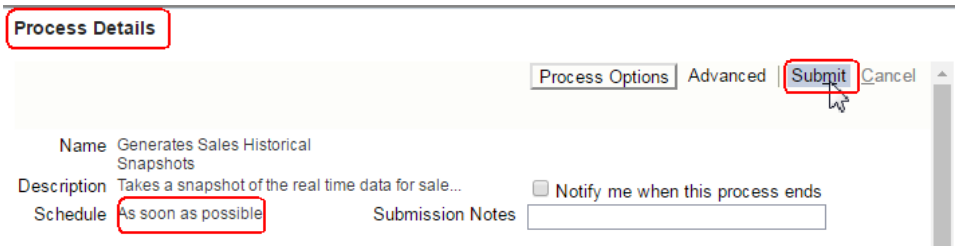
1) Under Search Results, click **Schedule New Process**.
2) Verify that Type = **Job**.
3) Set Name = **Generates Sales Historical Snapshots**.



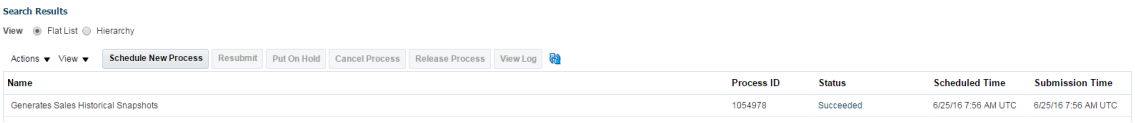
4) Click **OK**.



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

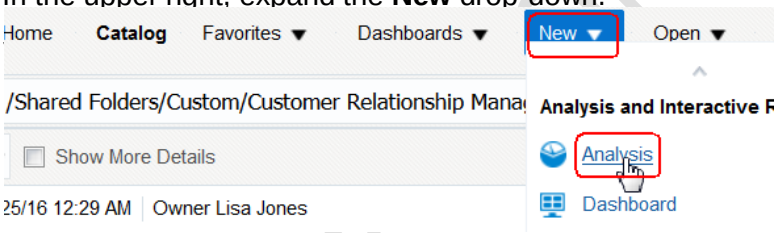


7) In the **Confirmation** dialog box, click **OK**.
8) In the **Process Details** popup, click **Close**.
9) Refresh the process list until the process shows as Completed; this should take 2-3 minutes.



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.



   e. Drill down on the **Sales - CRM Historical Pipeline** subject area. You may need to scroll down.

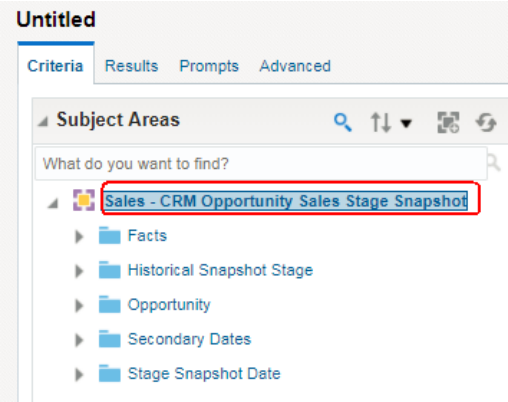
      This subject area is specifically designed for reporting on opportunities and revenues against their daily, weekly or monthly (depending on the enterprise calendar period setup), quarterly and yearly trends or to compare opportunity and revenue data against specific points in time.

      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

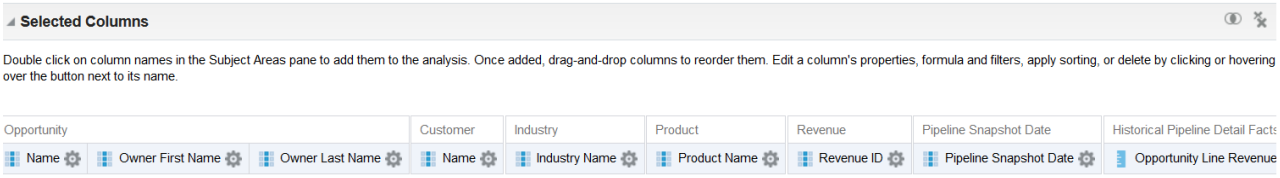


f. Select the columns for your analysis:

1) In the regional area, expand **Opportunity**.
2) Double-click Opportunity **Name** to add it to the Selected Columns section. You may need to scroll down to locate Opportunity Name.
3) Add **Owner First Name**.
4) Add **Owner Last Name**.
5) Collapse Opportunity.
6) Expand **Customer**.
7) Add Customer **Name**.
8) Collapse Customer.
9) Expand **Industry**.
10) Add **Industry Name**.
11) Collapse Industry.
12) Expand **Product**.
13) Add **Product Name**.
14) Collapse Product.
15) Expand **Revenue**.
16) Add **Revenue ID**.
17) Collapse Revenue.
18) Expand **Pipeline Snapshot Date**.
19) Notice that you can choose a pipeline date, period (week or month), quarter, or

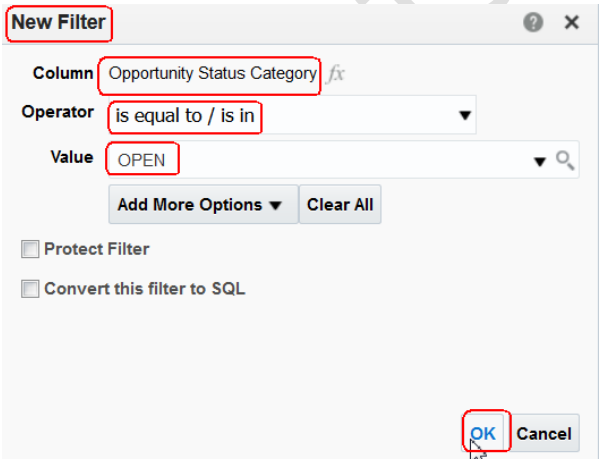
year.

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:



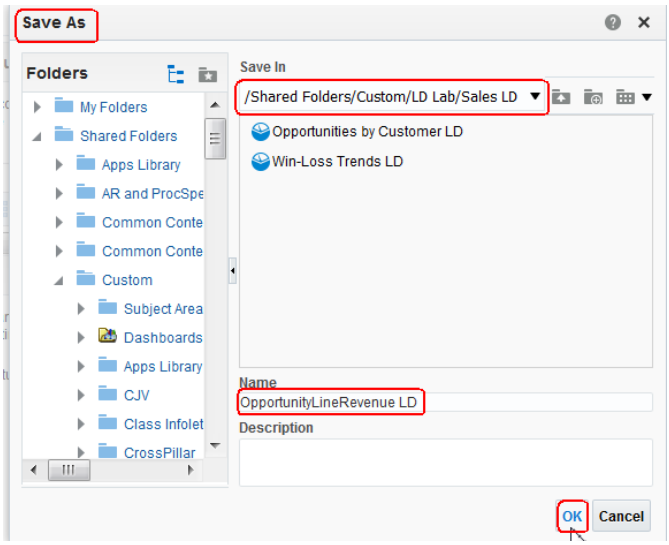
g. Filter to only include open opportunities.

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.



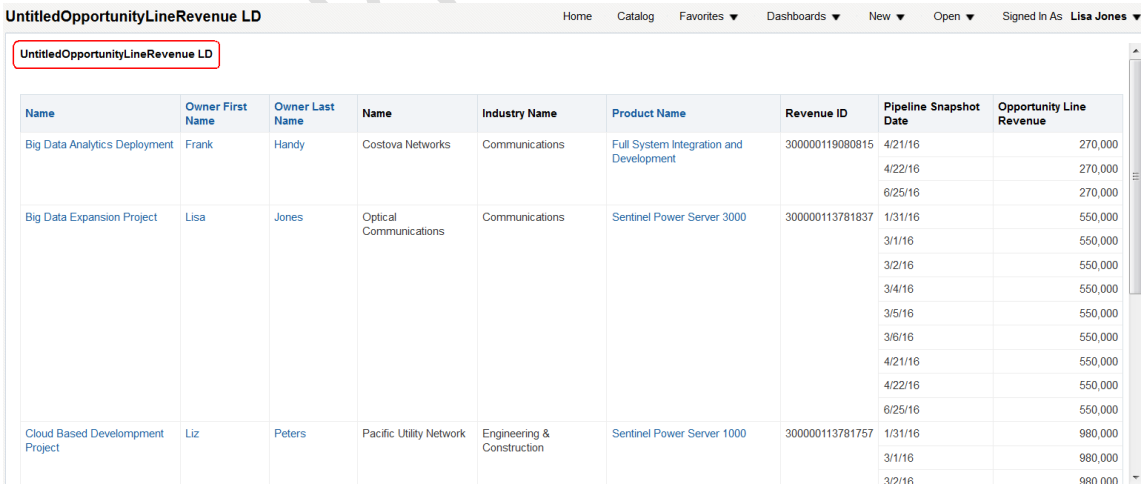
h. **Save** the report.

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**.



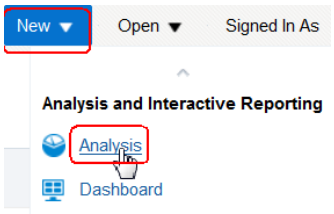
4. Verify the **results**.
   a. Click on **Catalog**

   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.



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

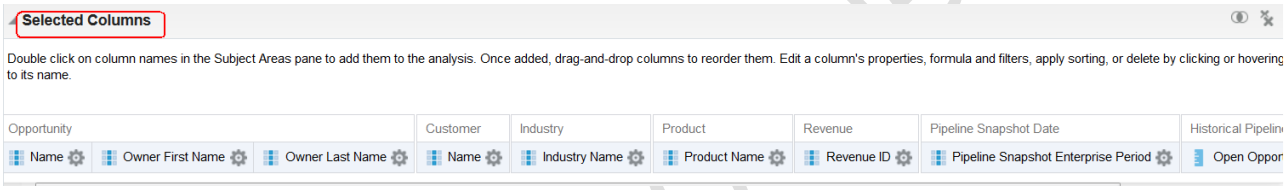
5. Test a more advanced report. (**Optional**)
   Note that this report is very similar to the previous report, and you could edit the previous report instead of creating an entirely new one.
   a. If necessary, navigate to Reports and Analytics.
   b. Click the Browse Catalog icon.
   c. Select **New > Analysis**.



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**



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

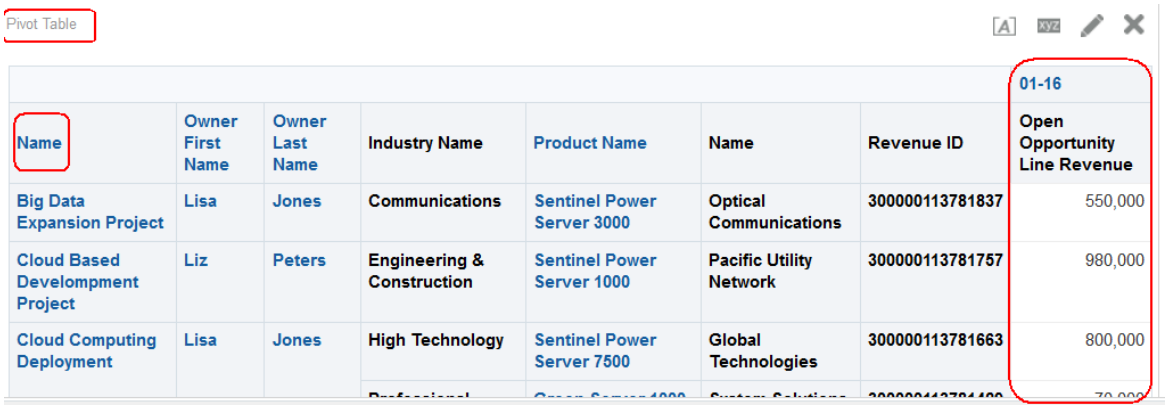
g. Above the **Compound Layout** section, click **New View** .

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.



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

4.7 Custom Subject Areas

Goals

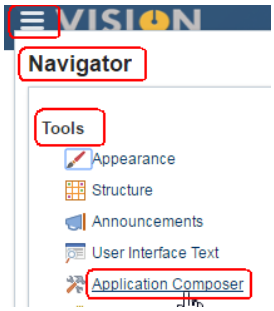
- Create a custom subject area based on custom objects

Overview

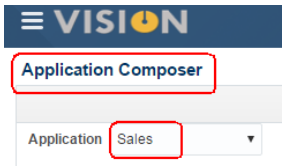
In this practice, you will create a custom subject area based on a pair of seeded custom objects. You will not publish the custom subject area as that would create concurrency issues in the classroom.

Tasks

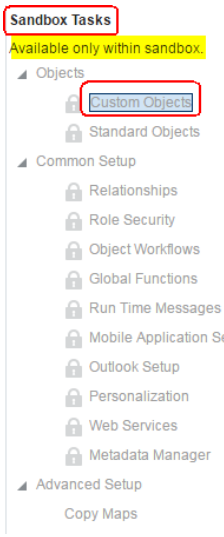
1. Sign in as Bala Gupta, user name **bala.gupta**.
2. **If necessary**, exit your sandbox:
   a. In the global area, click ApplCoreLongSB_EXT*nn*, where *nn* is your student number. More sandbox information should be shown.
   b. In the Sandbox Information section, click Exit Sandbox.
   c. Click Yes 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**.

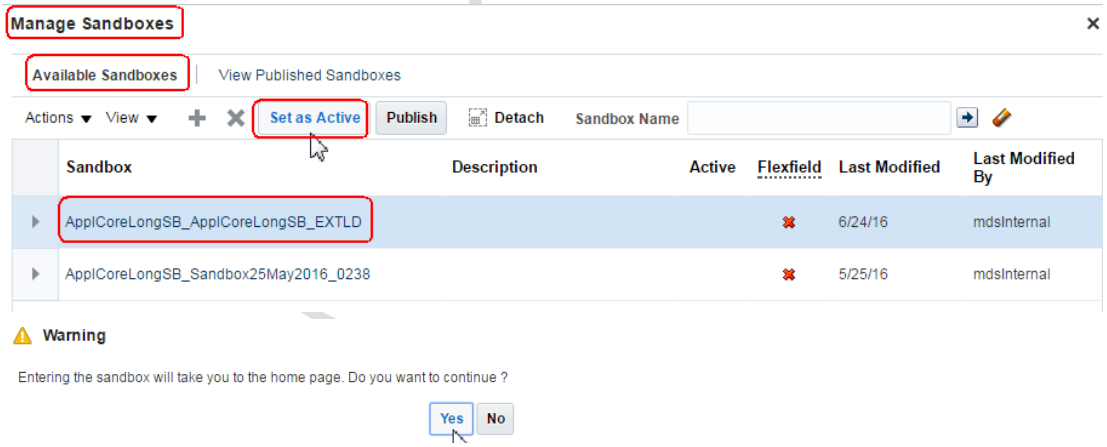


   b. In the regional area, set Application = **Sales**.



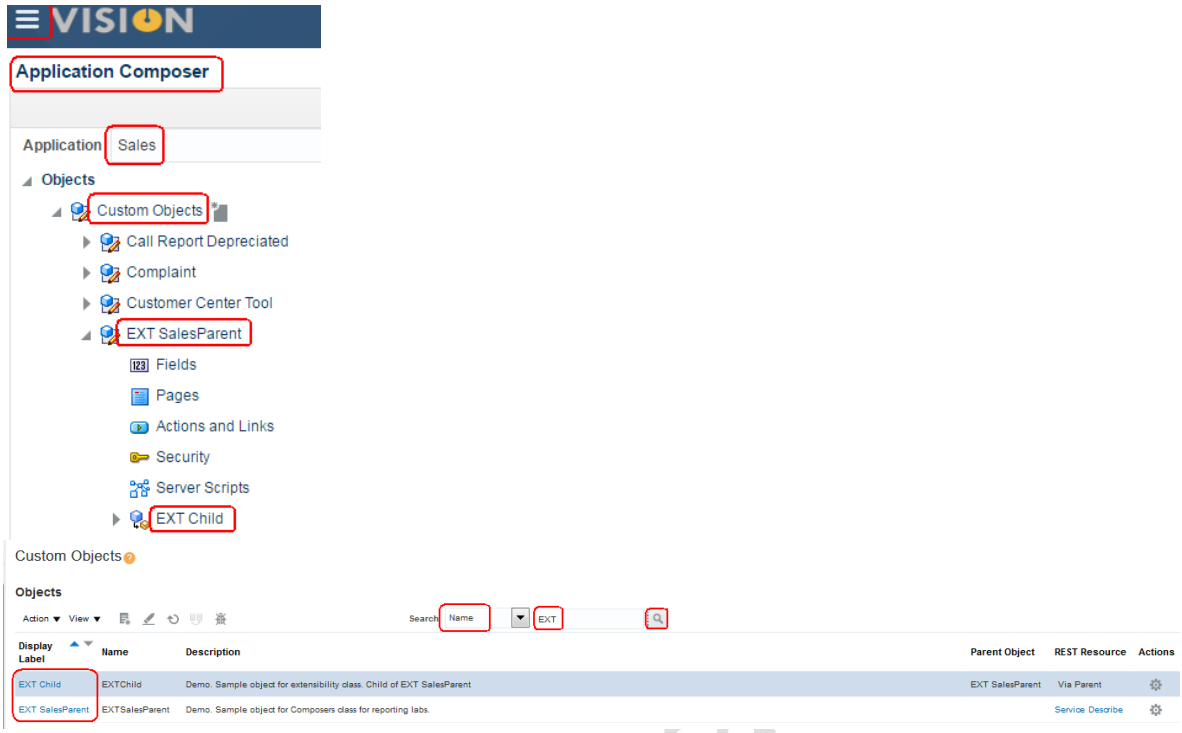
Please Notice you need to activate a Sandbox. For more details please check topic “4.3 Add an Infolet to the Dashboard”





c. Expand **Custom Objects**.

d. Notice that the list includes two custom objects: "**EXT Child**" and "**EXT SalesParent**".



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

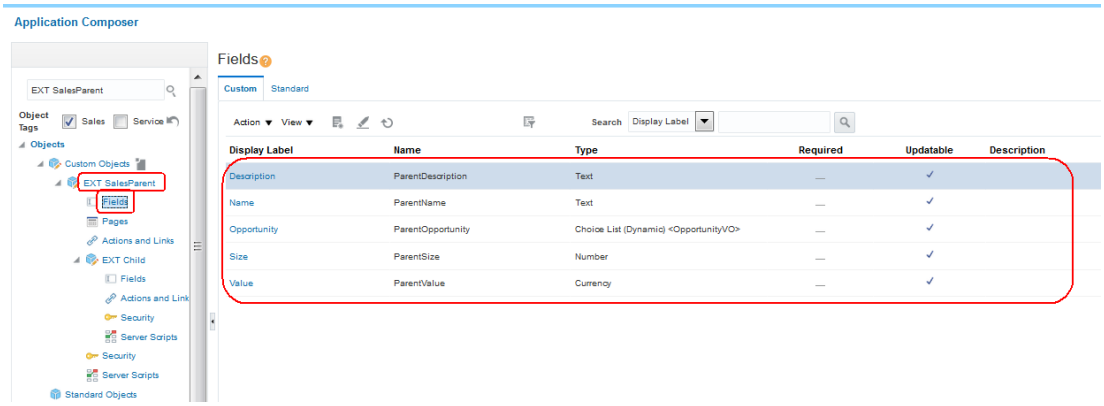
4. Examine the structure of the parent.
   a. In the regional area, notice that EXT SalesParent is a parent object, as indicated by its icon .

      You can also recognize parent objects by expanding them and noting that they have Pages. Child objects do not have Pages in Oracle Application Composer.

   b. Expand **EXT SalesParent**.

   c. Click **Fields**.

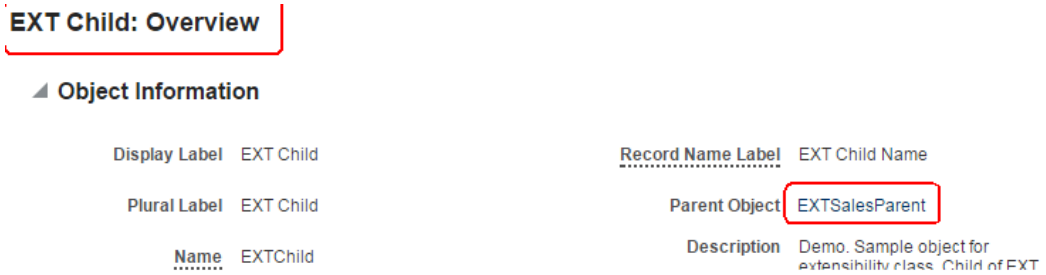
   d. Observe that there are **five custom fields** of varying types; in particular, there is one number field and one currency field. These fields are candidates for **fact** or **measure** columns.



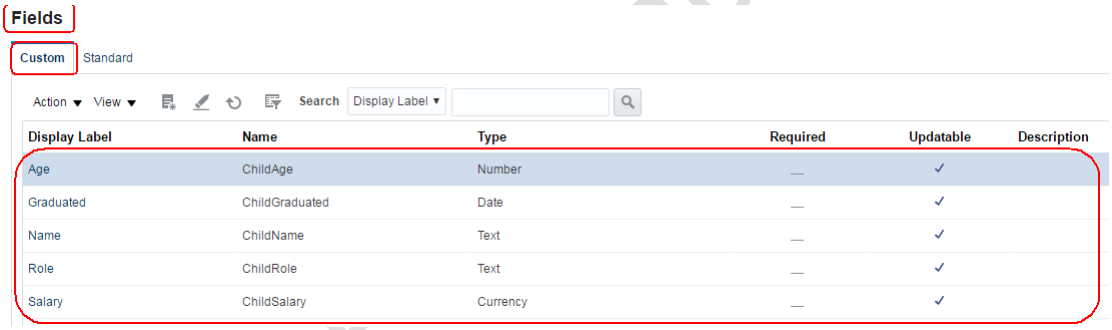
   e. Observe that there is a dynamic choice list field that references the Opportunity object.

      This indicates that the Opportunity object is a related object. You can add fields from a related object to your custom subject area.

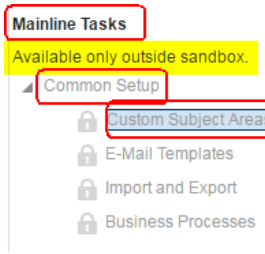
5. Examine the structure of **EXT Child**.
   a. In the regional area, notice that EXT Child is a child object, as indicated by its icon .
   b. In the regional area, click **EXT Child.**
   c. In the local area, notice that Parent Object = EXTSalesParent.



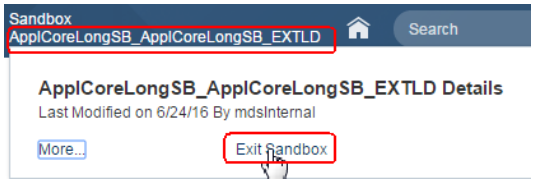
   d. In the regional area, expand **EXT Child**.
   e. Click Fields.
   f. Observe there are **five** custom fields of varying types, including one number field, one date, and one currency field. These fields are candidates for **fact** or **measure** columns.

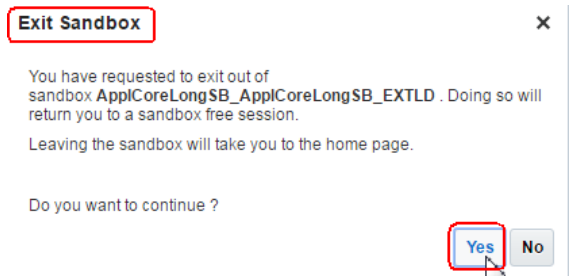


6. Create the **custom subject area**.



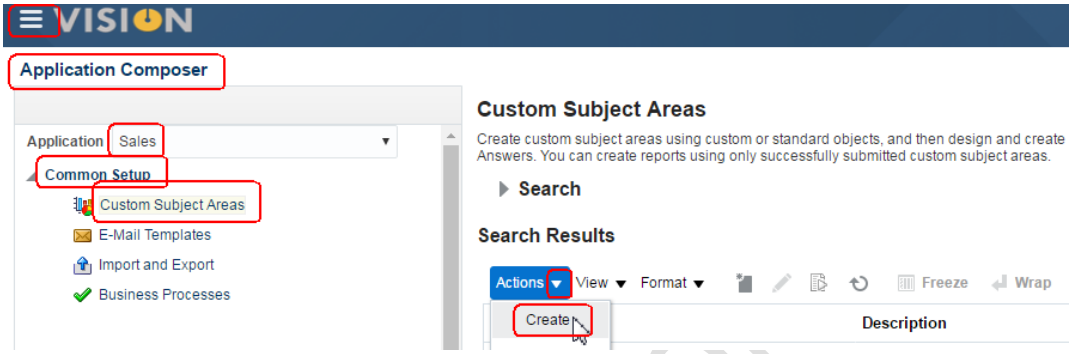
Exit the Sandbox





a. In the regional area, under **Common Setup**, click **Custom Subject Areas**.

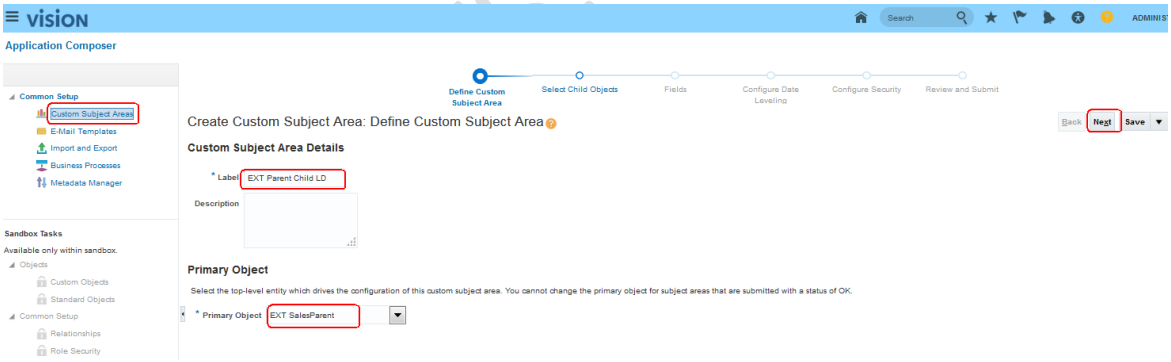
b. In the local area, click the **Create** icon.



c. Set Label = **EXT Parent Child nn**, where nn is your student initials.

d. Set Primary Object = **EXT SalesParent**.

e. Click **Next**.



7. Select the child objects.

a. Click the "Add Child Object" icon  at the right of the EXT SalesParent section.

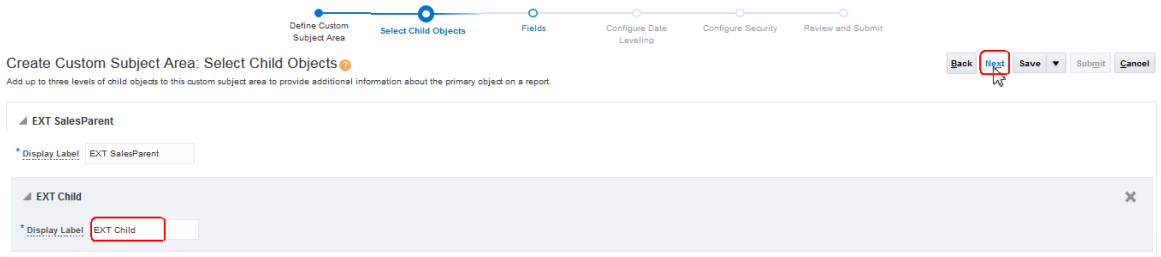
b. Set Child Object = EXT Child.

c. Click OK.

d. 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.

e. Click **Next**.



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.

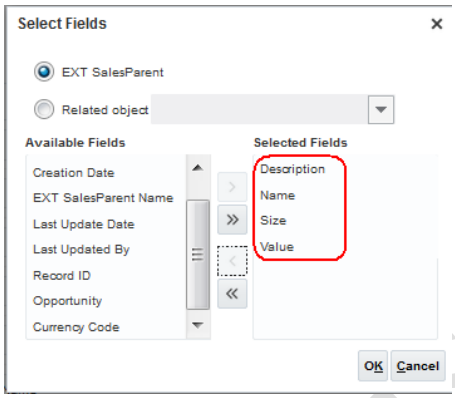
c. In the **Selected Fields** dialog Select Fields, **CTRL-click** to select:

- 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.

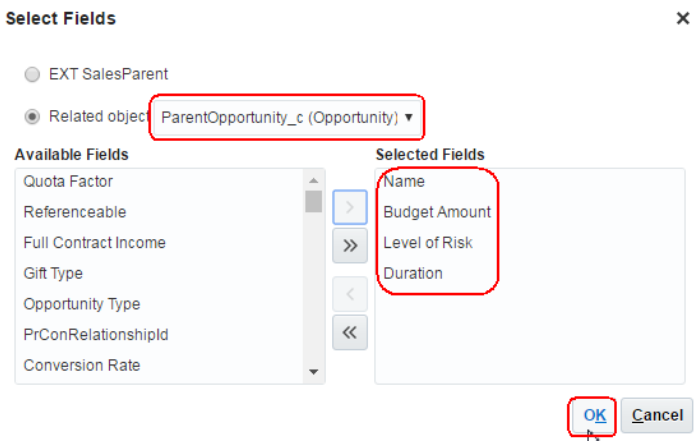
It was not necessary to close the dialog box, but when you are first learning to build custom subject areas it can help immensely to do one object at a time.

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

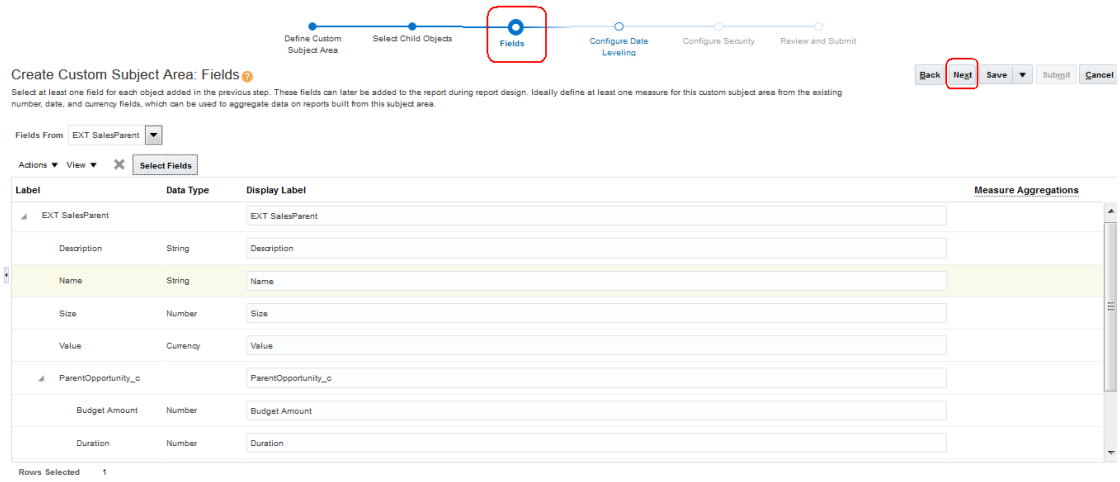
   and move them to the Selected Fields pane.

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.



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**.

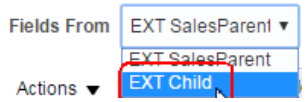
m. Observe that the two number columns that you selected (**Budget Amount** and **Duration**) are not designated as **measure** fields.

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.

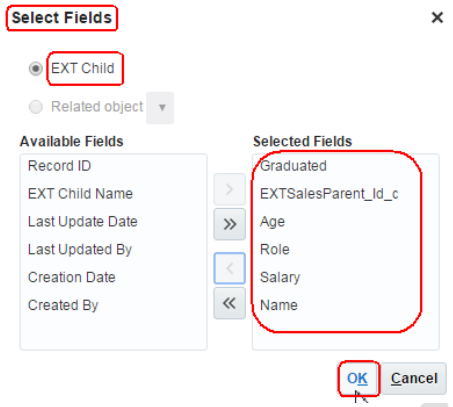
c. In the **Selected Fields** pane, Ctrl-click to select

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

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

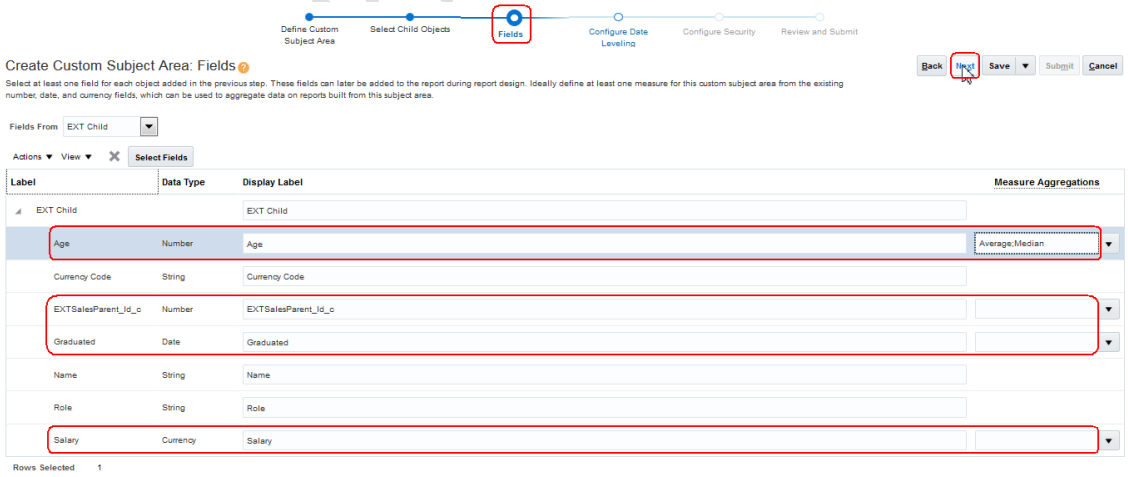
This should leave Graduated, EXTSalesParent_Id_c, Age, Role, Salary, and Name as selected fields.

d. Click **OK**.



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

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



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

h. Leave the other measure aggregations blank.

i. Click **Next**.

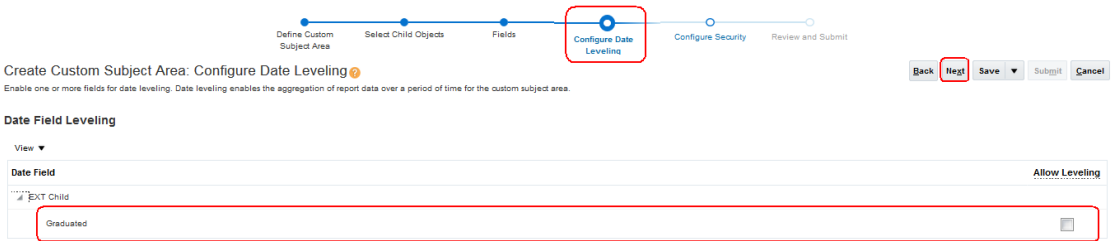
12. Examine **Date Leveling**. Date leveling is used to roll up data by date. For this exercise you will not enable date leveling.

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

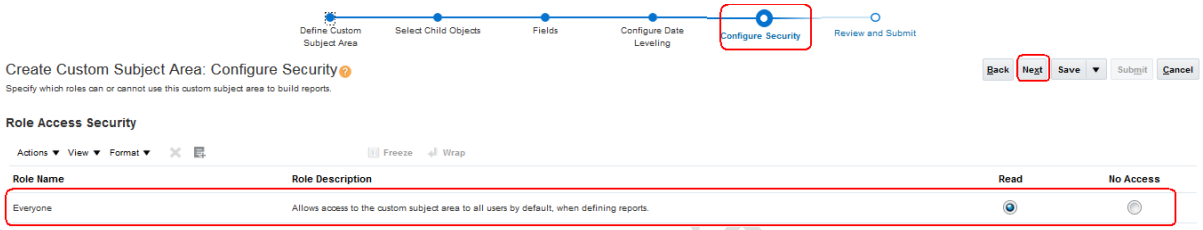
b. Observe that only date fields for the objects are displayed. You can designate a date

field for date leveling.

b. Click **Next**.

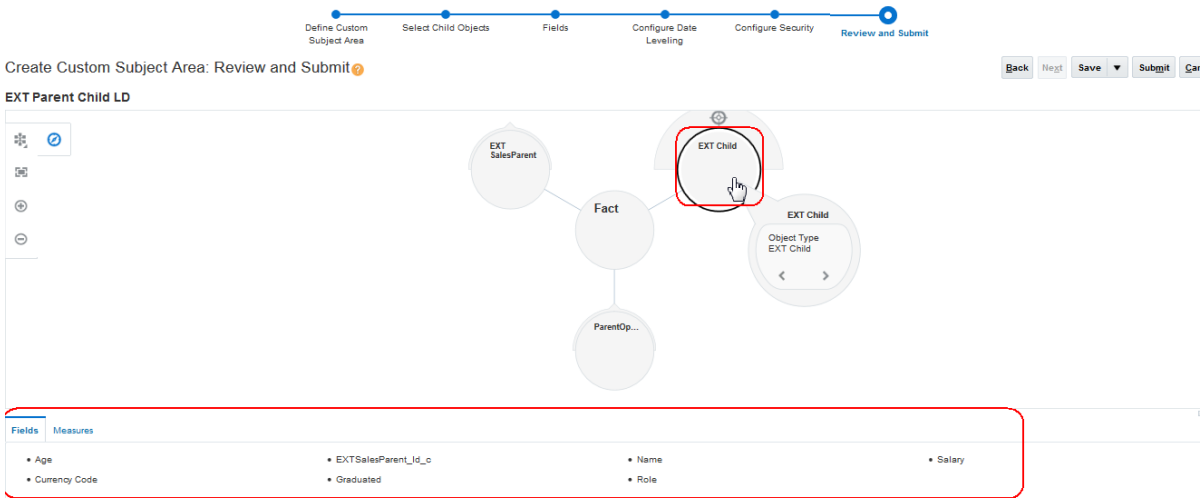


13. **Configure** the custom object **security**.
    a. Accept the default of Read for all roles.
    b. Click Next.



14. Review the structure of the custom subject area.
    a. Observe that a hub and spoke diagram is displayed similar to:

    b. 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).
    c. In the local area, in the diagram, click **EXT Child**.
    d. Notice that the tabs at the bottom become "Fields" and "Measures", listing fields and measures for this object.



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

15. **Cancel** your changes 

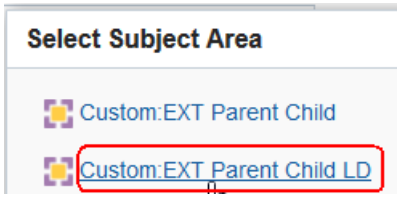
.

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

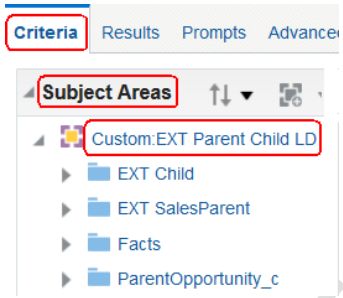
    a. Click **Cancel**.
    b. Click **Yes**.

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.

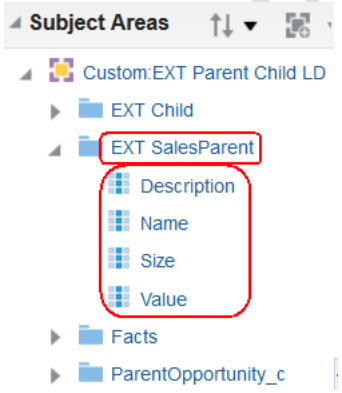
    b. Note the name of your subject area is prefixed with **Custom**:



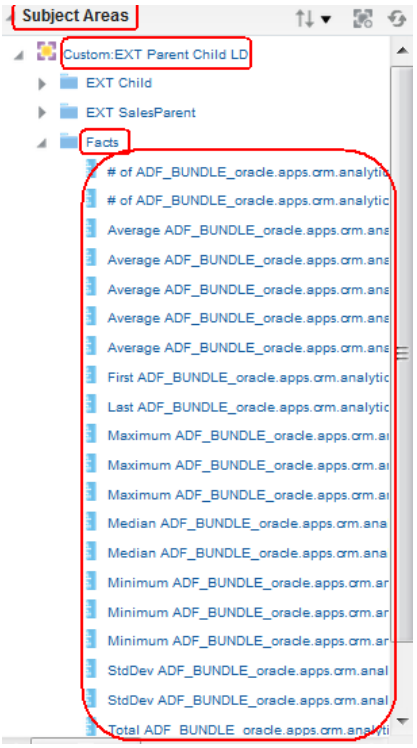
    c. The subject area contains several folders:
    - A dimension folder for each of the objects in the subject area
    - A fact folder that contains all the columns designated as measures.
    - Since date leveling was not enabled there are no additional date-related folders:



    - 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

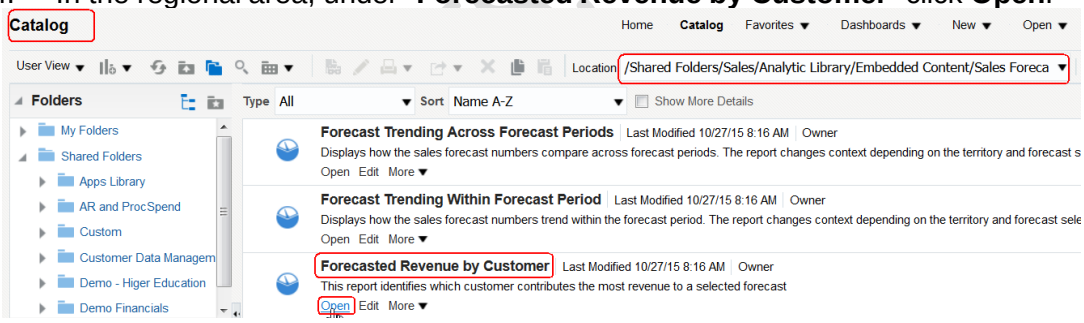
- Configure a report to allow drilling down to a detailed report about a record in the first report

Overview

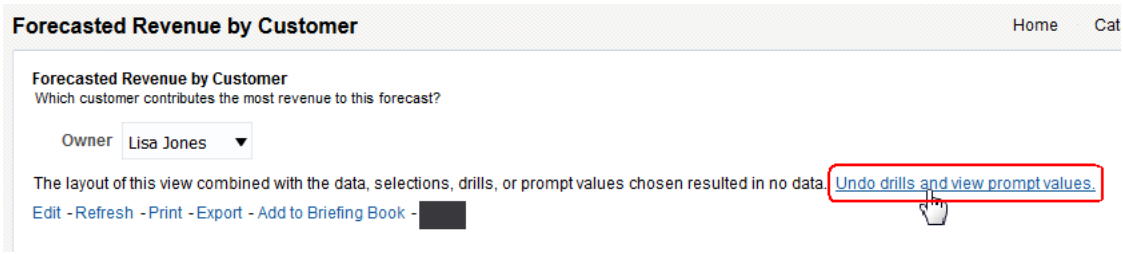
In this practice you will configure a source report that displays information about customers to enable drilldown to a customer pipeline report for the selected customer.

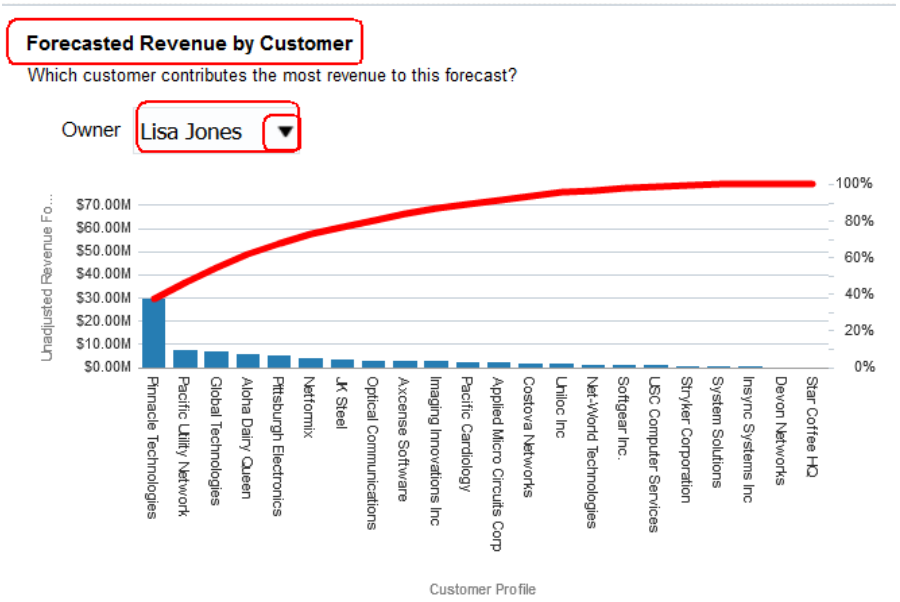
Tasks

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



   The Forecasted Revenue by Customer report should open.
   g. Set Owner = **Lisa Jones**.
   h. Observe that a combination bar and line chart appears.
   This type of chart is known as a Pareto chart.





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.

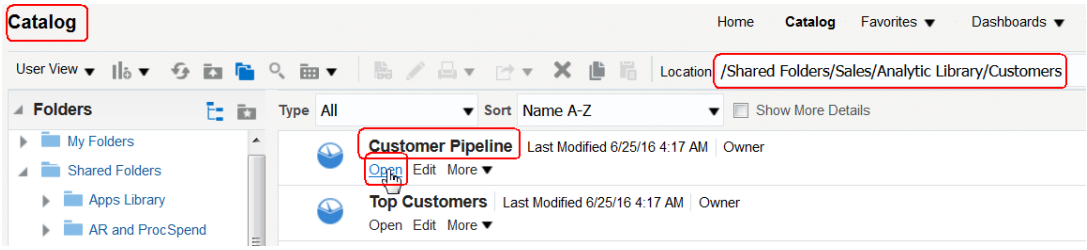
b. Click the **Browse Catalog** button to invoke a second Oracle Business Intelligence browser tab.

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.



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

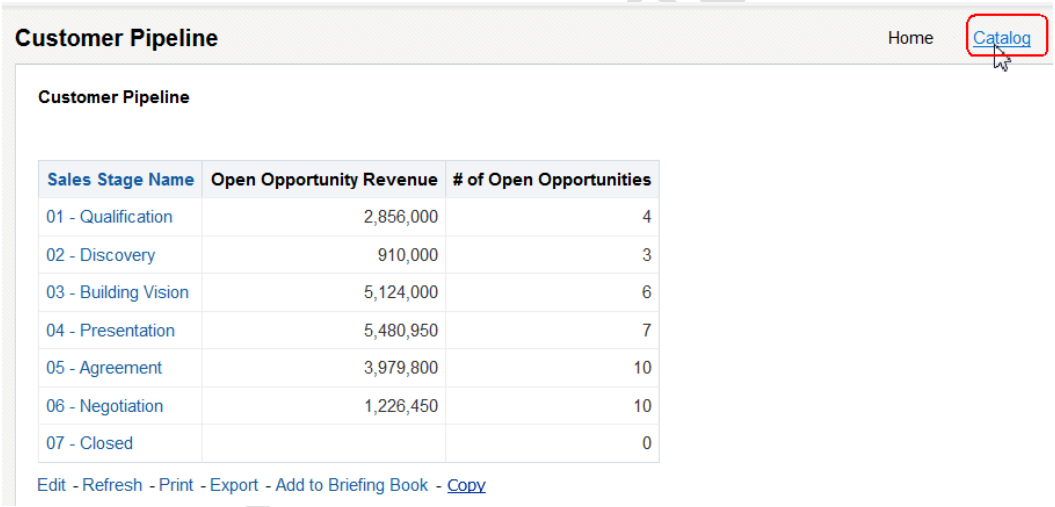
Customer Pipeline

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

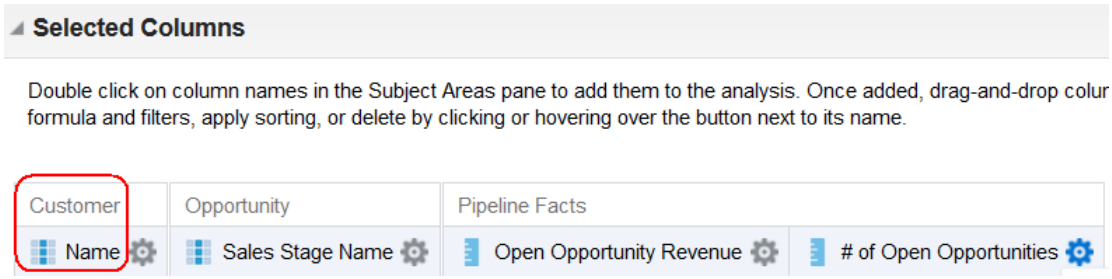
You will be modifying this report to **show open opportunity revenue by customer**.

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



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**.



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.

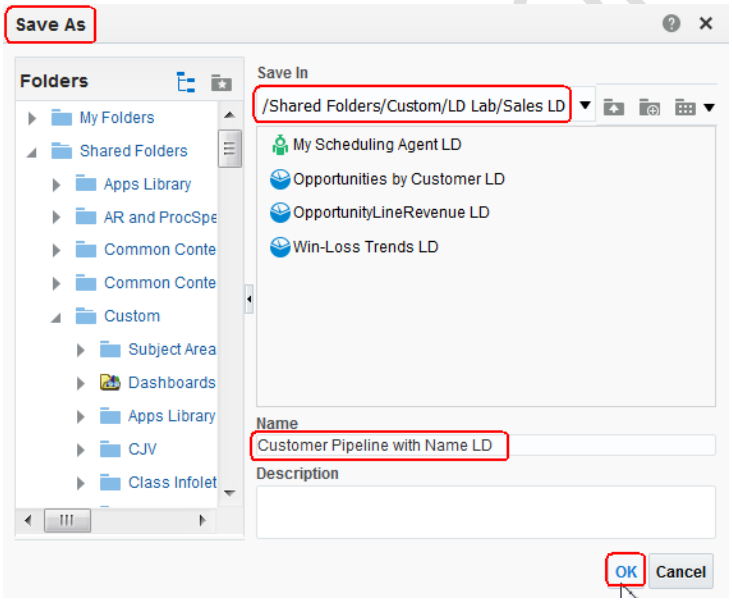
1) In the upper right, click the **Save As** button.

2) Navigate to **Shared Folders > Custom > LD Lab > Sales *nn*,** where *nn* is your student **initials**.

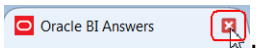
You created this folder in a previous practice. If it does not exist, create it now.

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.

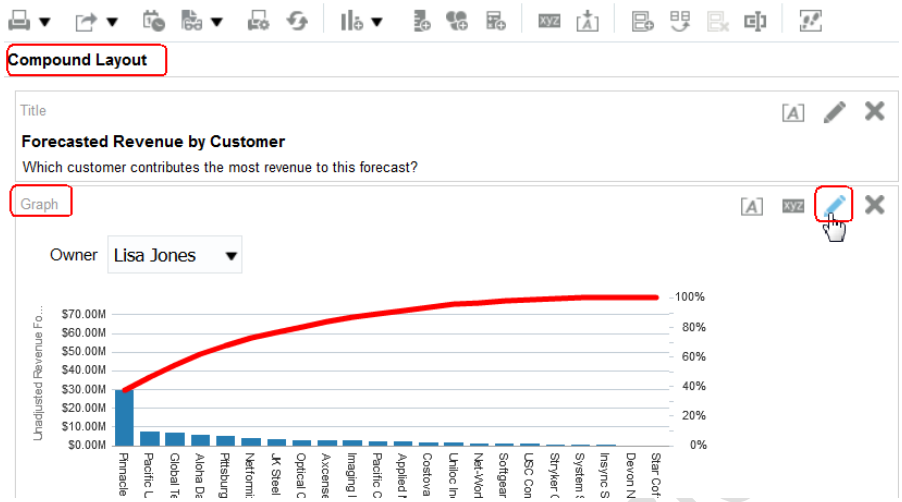
b. In the secondary application menu, click Catalog to return to the catalog page.

c. In the regional area select **Shared Folders > Sales > Analytic Library > Embedded Content > Sales Forecasting**.

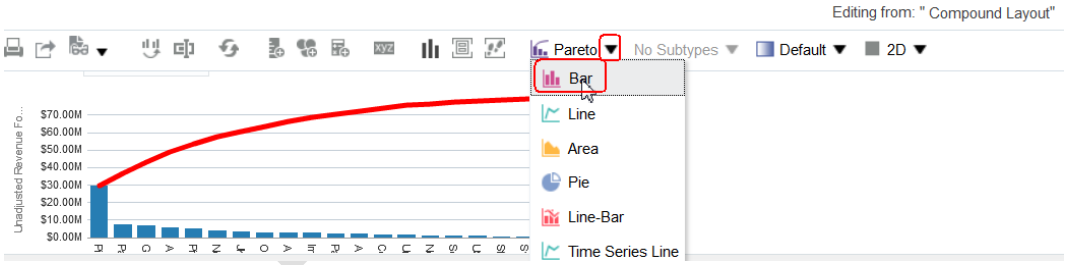
d. In the local area, under "**Forecasted Revenue by Customer**" click **Edit**.

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.

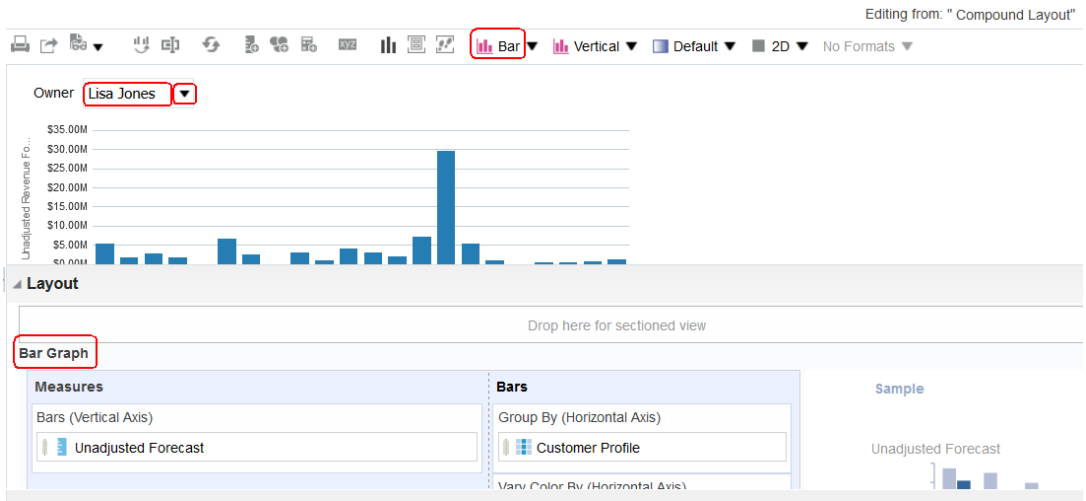


2) At the top of the report pane, expand Pareto and use the View Type list to change the view type to **Bar**.



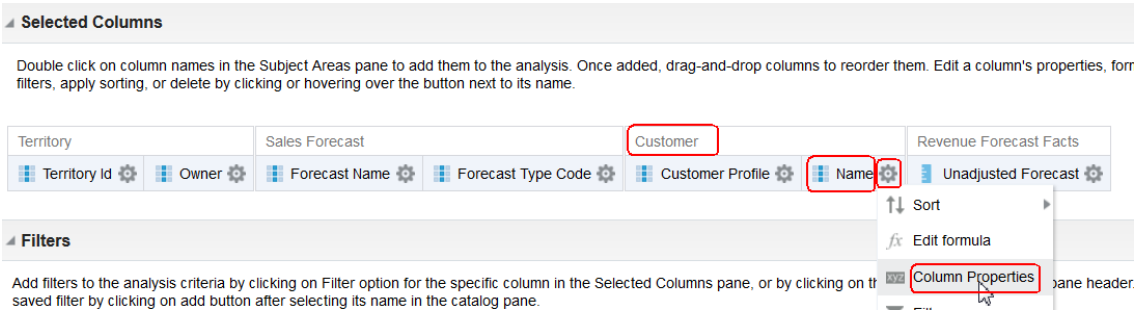
3) Set Owner = **Lisa Jones**.

4) Observe that a bar graph appears in the Layout section.



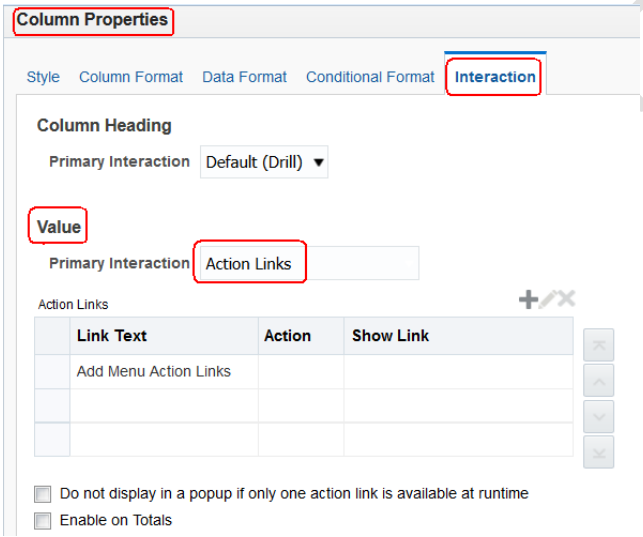
f. Click the **Criteria** tab. If you are prompted to keep your changes, click **Yes**.

g. Add Customer **Name** column; to the right of Customer **Name**, expand the drop-down and select **Column Properties**.



6. Configure the navigation details.
   a. In the **Column Properties** window, click the **Interaction** tab.
   b. 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.
   c. Under Value, set **Primary Interaction** = **Action Links**.



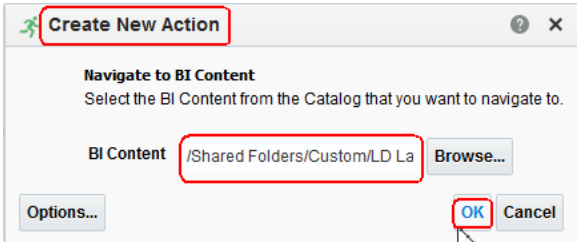
   d. Create an action that navigates to your customer pipeline report.
      1) Click the **Add Action Link** icon .
      2) In the New Action Link dialog box, set **Link Text** = **Drill to Opportunities by Customer**.

         This text appears when the user hovers the mouse over a bar in the chart.
      3) Click the Create New Action icon .
      4) 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.
      5) In the Select BI Content For Action dialog box, navigate to **Shared Folders > Custom > LD Lab > Sales *nn***, where *nn* is your student initials.
      6) Select **Customer Pipeline with Name *nn***, where *nn* is your student initials.

         This specifies the target report.

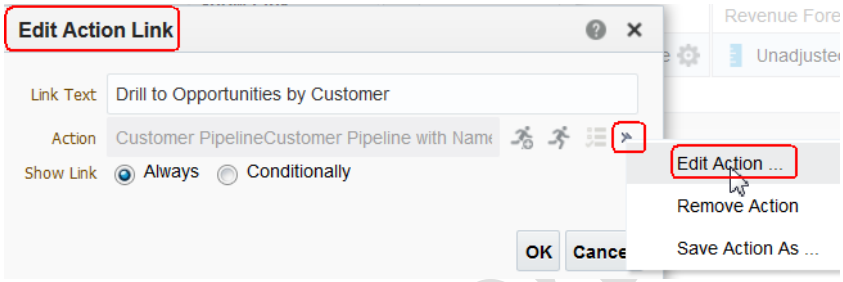
7) Click **OK** to close the Select BI Content for Action window.



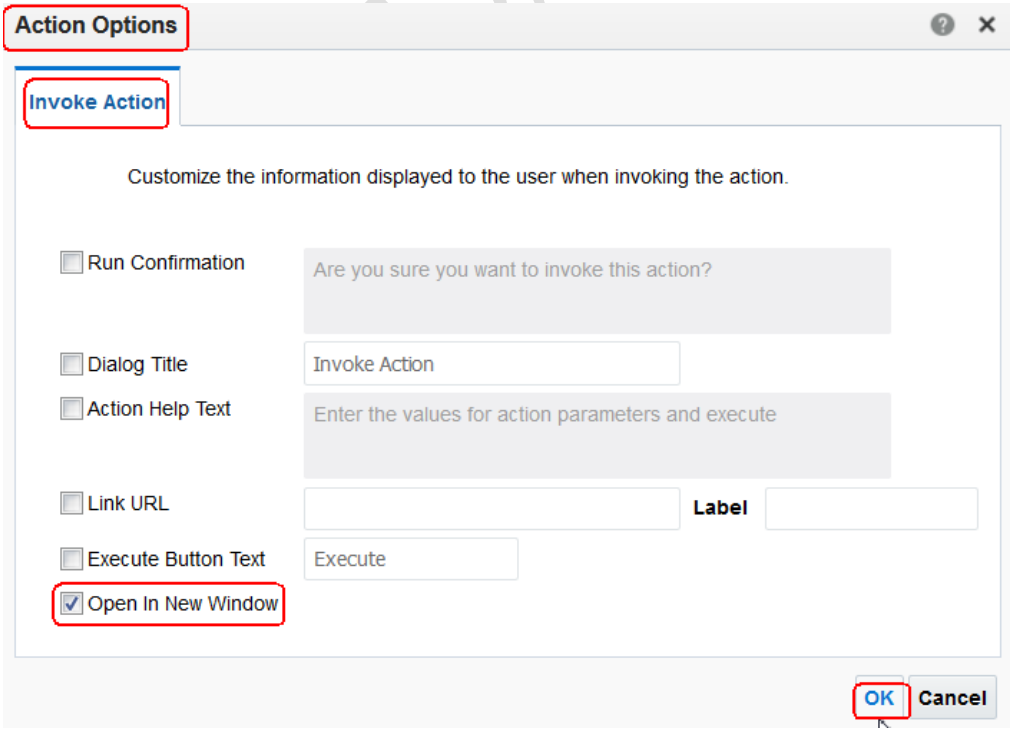
8) Click **OK** to close the Create New Action window.

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 ».



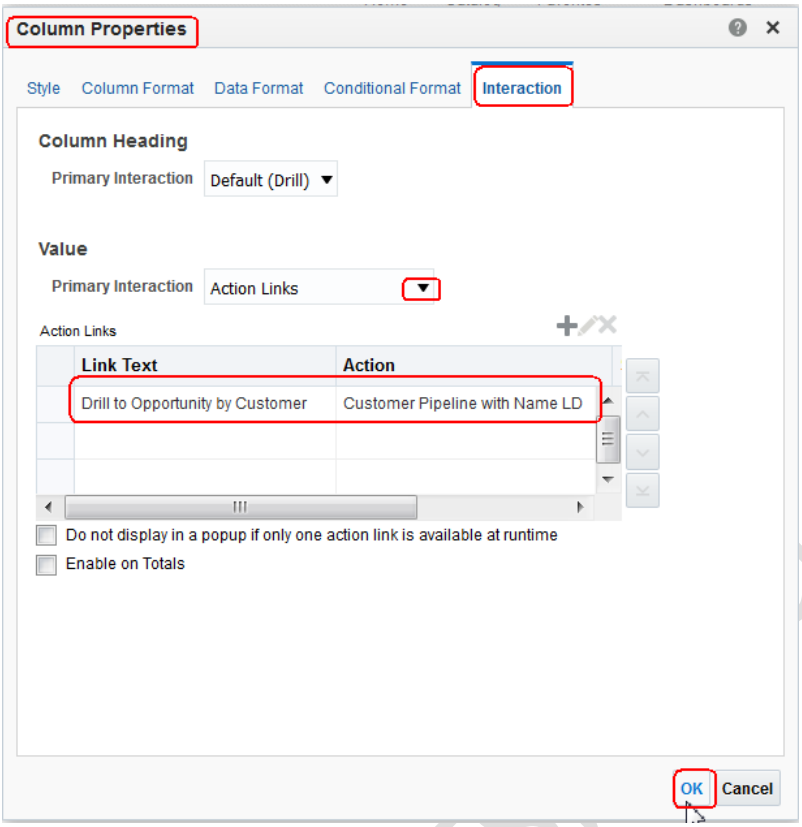
2) In the More drop-down, select Edit Action.
3) In the **Edit Actions** window, click **Options**.
4) In the Action Options window, select the "**Open In New Window**" check box.
5) Click **OK** to close the Active Options dialog box.



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.



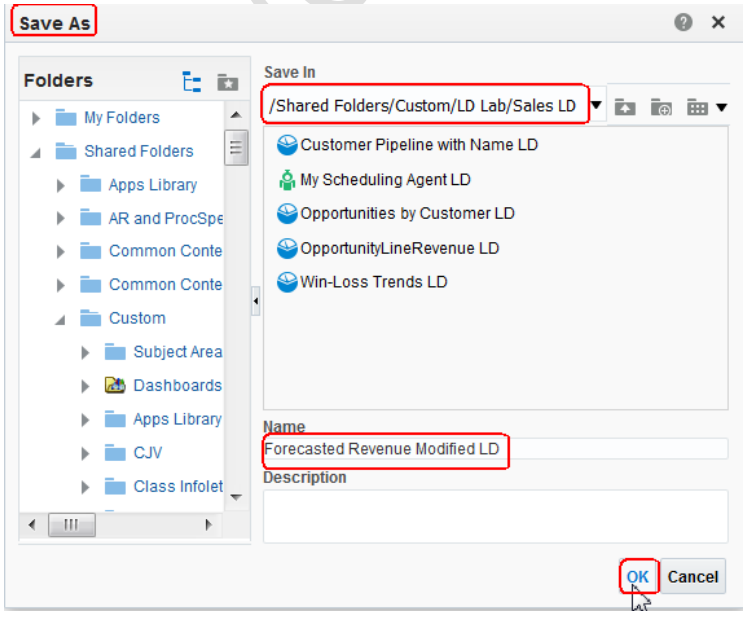
7. **Save** the modified report.

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.

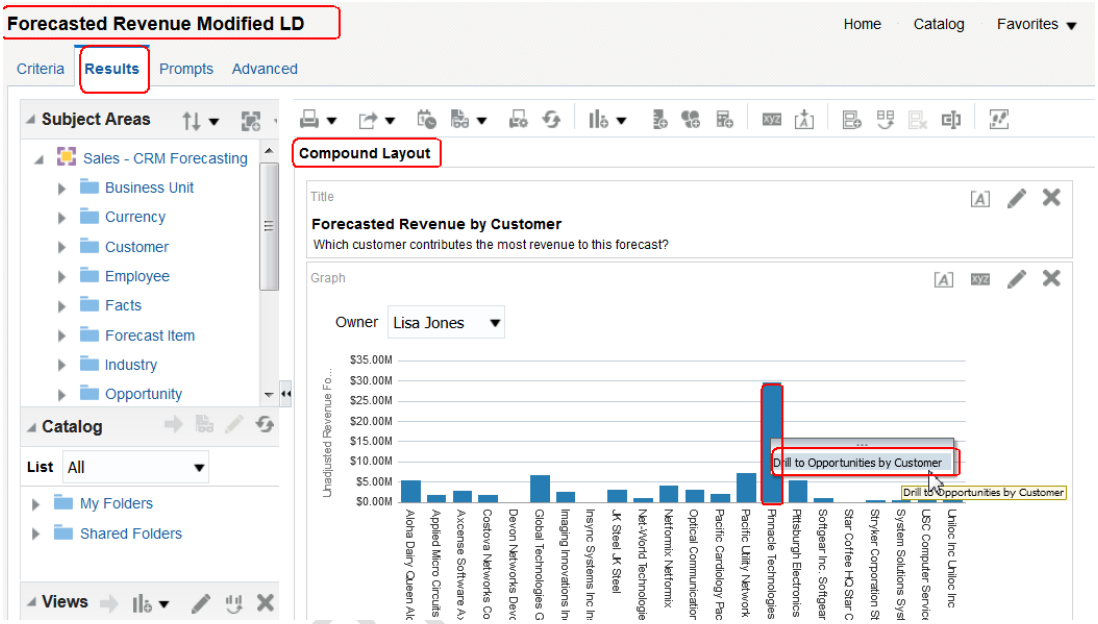
c. Set Name = **Forecasted Revenue Modified *nn***, where *nn* is your student initials.

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

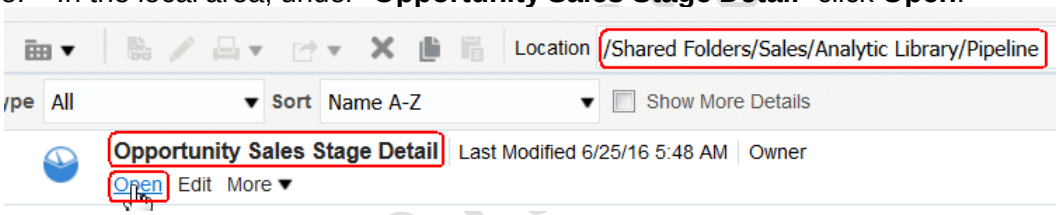
Overview

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

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



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

Opportunity Sales Stage Detail

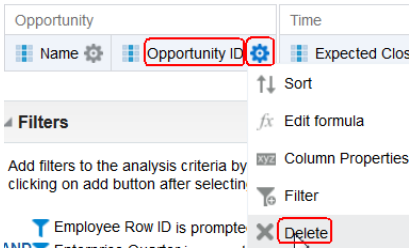
Name	Days Stalled	Expected Close Date	# of Days in Current Stage	Average Duration of Stage
Pinnacle Technologies Green Server		3/31/12		8
Pinnacle technologies seattle DataCenter Upgrade		3/31/12		8
Pinnacle Technologies NorthWest DataCenter		3/31/12		8
Pinnacle - Virtualization Software Project		9/30/12	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 Innonvations- 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 Opportuity		6/30/12		8
Pacific Utility Network Green Server		6/30/12		8
Pacific Utility Network seattle DataCenter Upgrade		12/31/12		8

   g. 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).
   h. 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

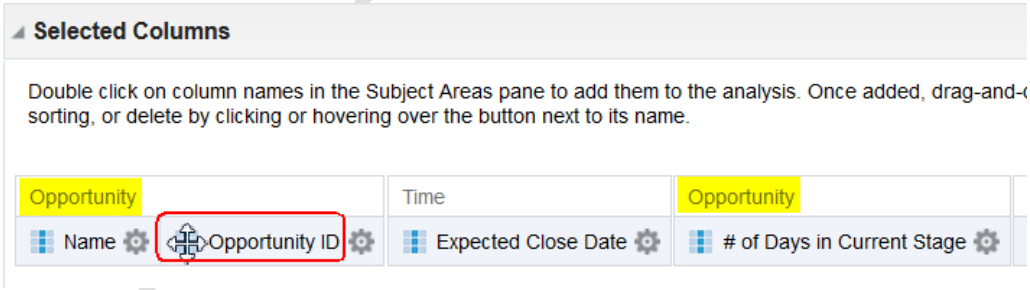
Sales Cloud for the opportunity. You first will add the Opportunity Id column to the report, as the Id field is required to retrieve the record.

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**.



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

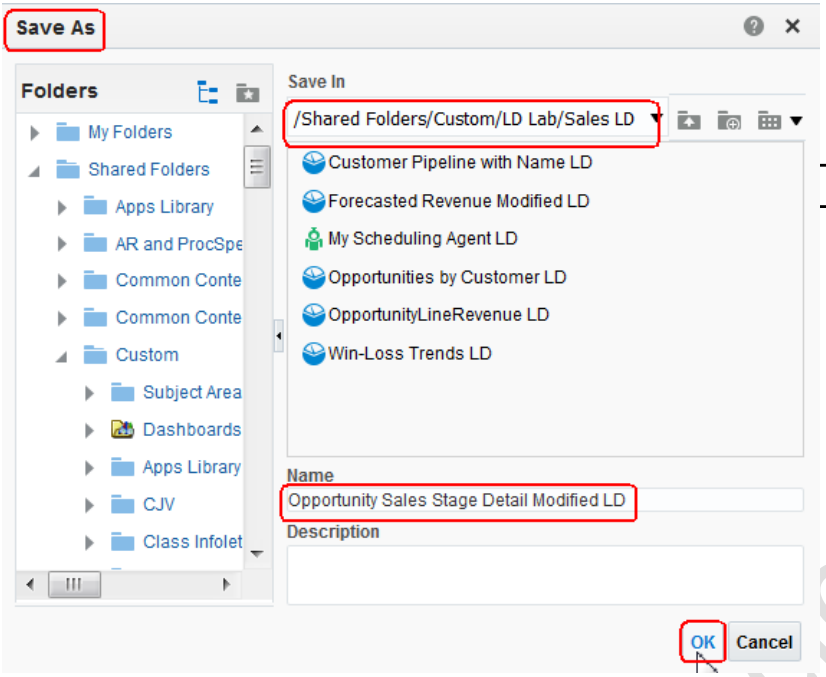
   e. Add Opportunity ID back to the report.
      1) In the regional area, expand **Opportunity**.
      2) Double-click **Opportunity ID**.
      3) In the local area, drag and drop to reposition **Opportunity ID** to the right of **Opportunity Name**.



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_OPP
TYMGMTOPPORTUNITIES_CRM_CARD&tabToOpen=MOO_OPPTYMGMTOPPORTUNITIE
S_CRM&TF_skipToEditOptyId=@{3}
```

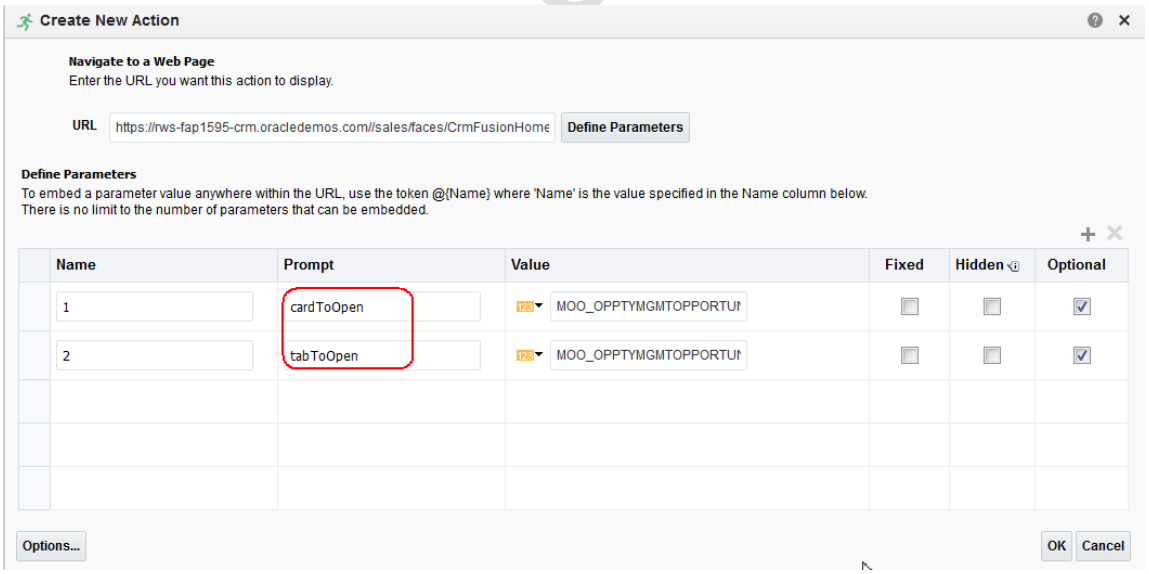
This URL provides:

- 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.

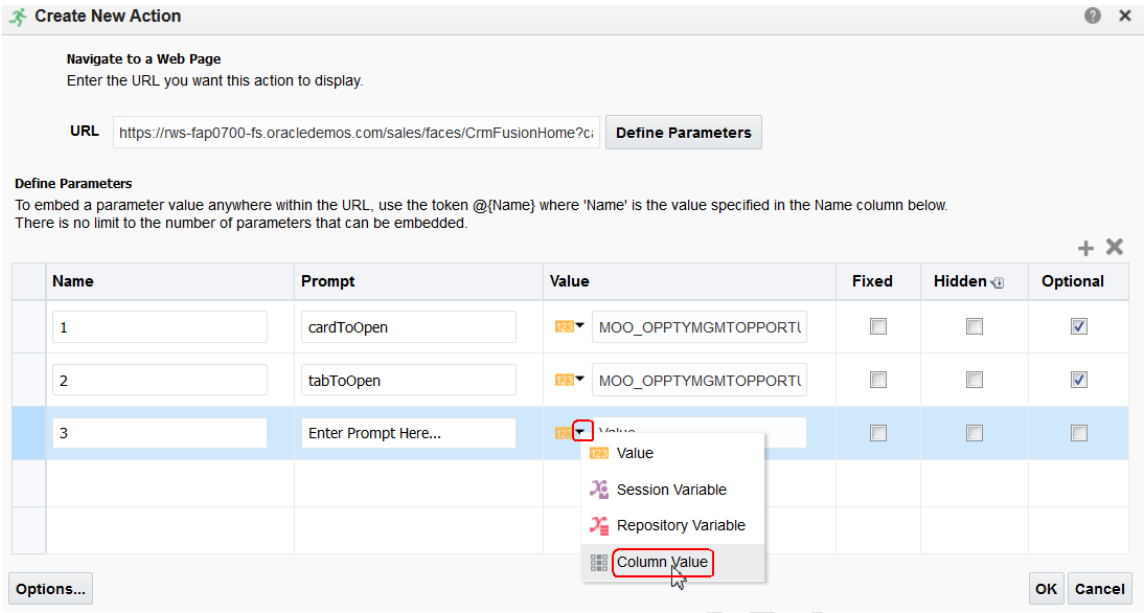
a. Click **Define Parameters**.

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

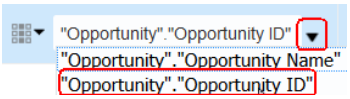


c. In the **Define Parameters** section, click the Add Parameter icon +.

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



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

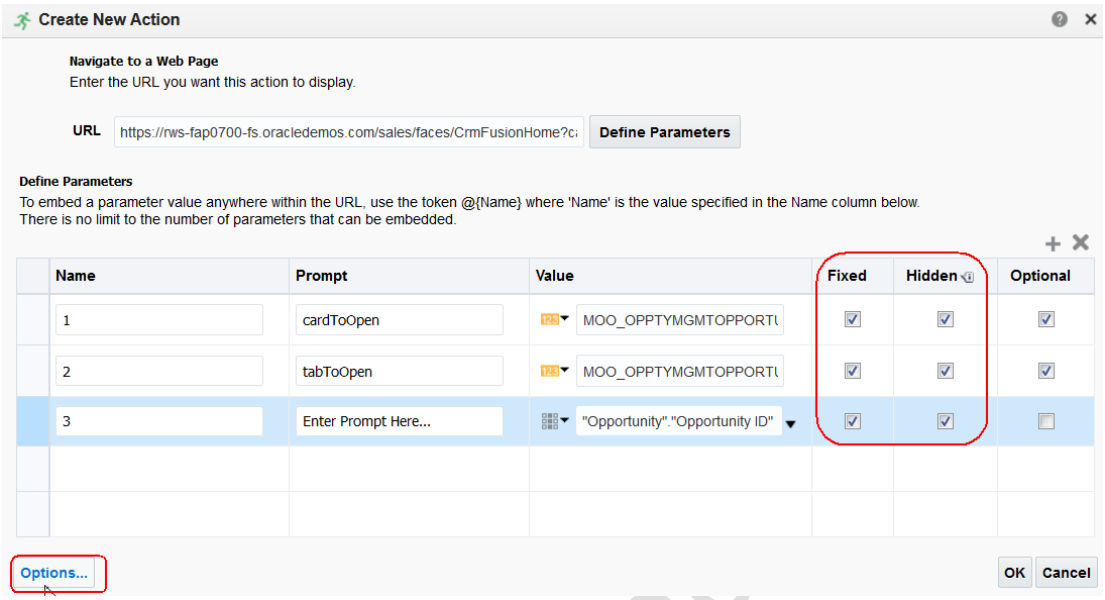


f. Select the **Hidden** check box for all of the records.
You do not want the user to modify these parameters.

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.

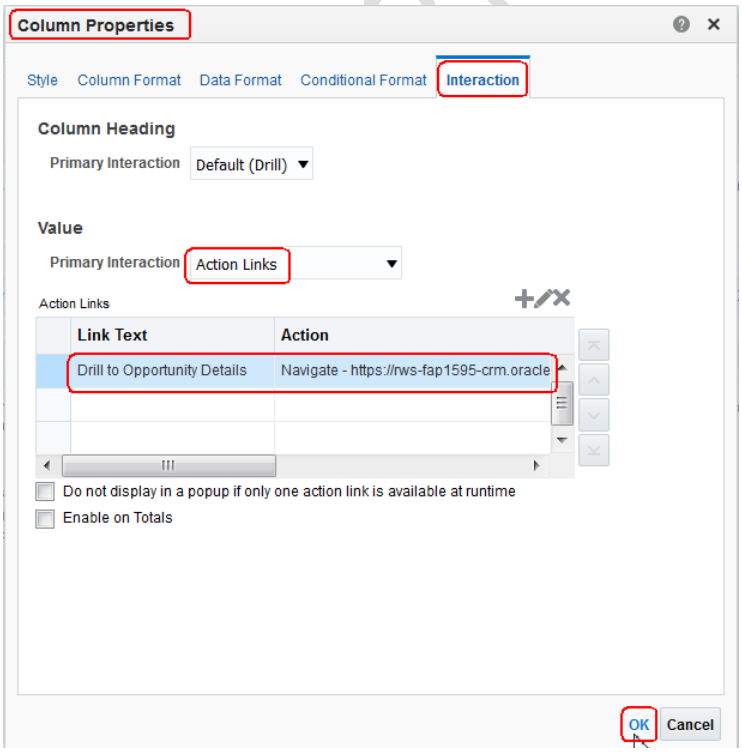
k. Click **OK** to close the Action Options dialog box.

l. Click **OK** to close Create New Action popup.

m. Click **OK** to close the New Action Link dialog box.

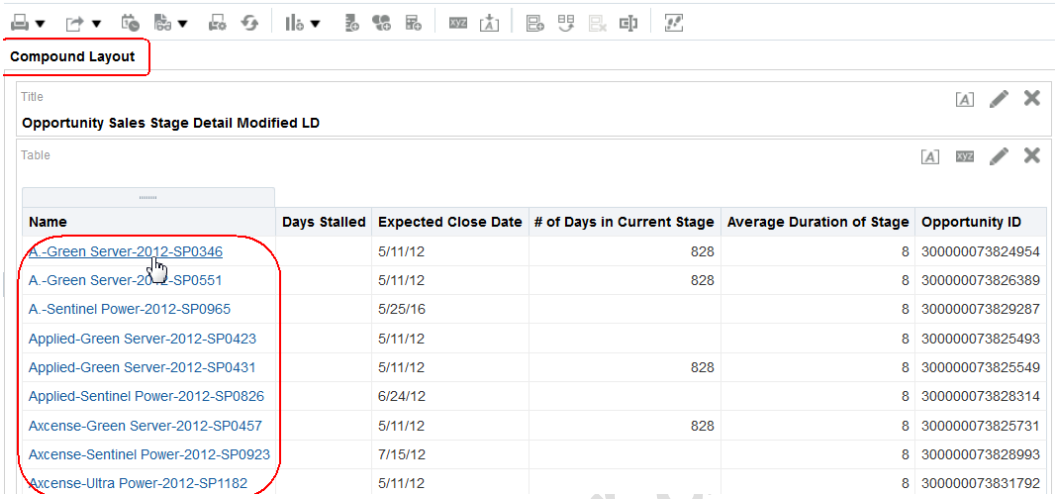
n. Verify that the Action Link was successfully configured; that is, there is an action link listed.

o. Click **OK** to close the Column Properties popup.



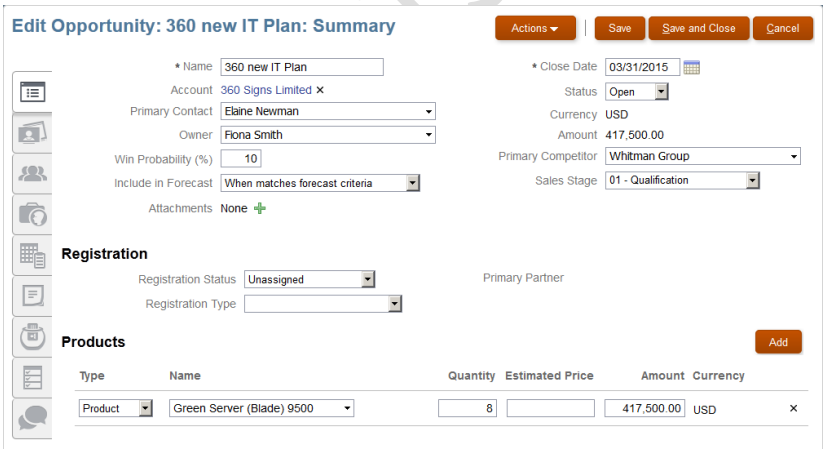
6. Click the **Save** Analysis button to save the modified report.

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.



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
Axcense-Green Server-2012-SP0457		5/11/12	828	8	300000073825731
Axcense-Sentinel Power-2012-SP0923		7/15/12		8	300000073828993
Axcense-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:



   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.

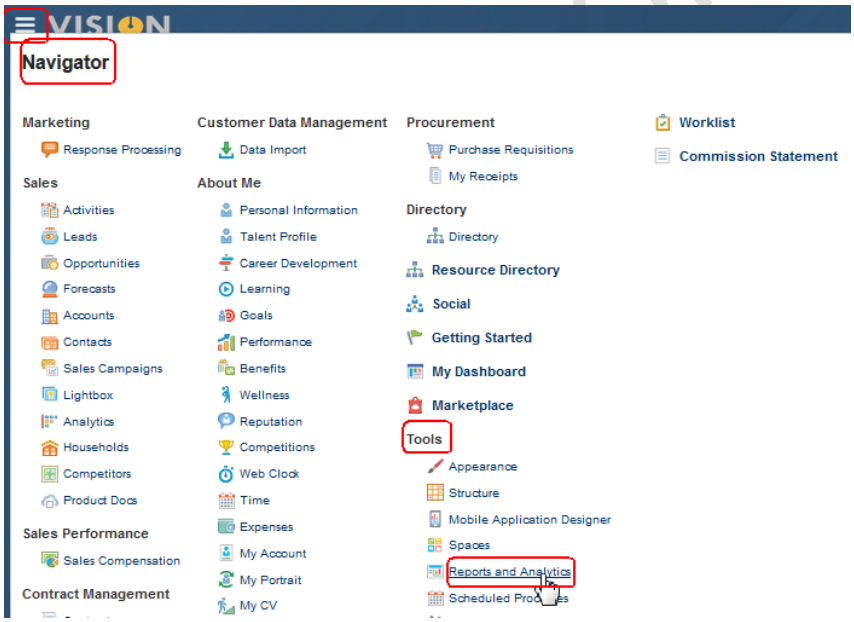
Sign in to the application using **Lisa Jones** login

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**.

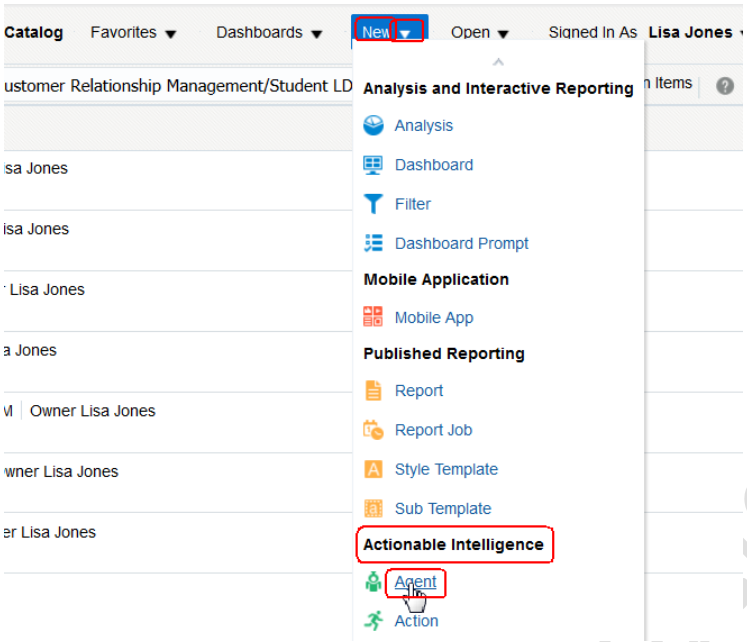


   b. In the regional area, click the **Browse Catalog** icon .

2. Invoke the **Oracle BI Agent** to run a report.

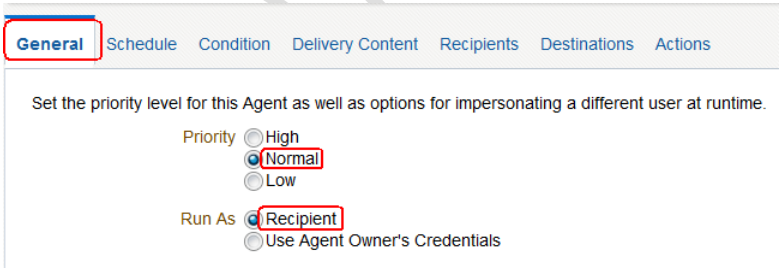
a. Expand the New drop-down.

b. Select Agent (under Actionable Intelligence).



3. Configure the agent.
   a. Verify that the **General** tab is selected.
   b. Verify that Priority = **Normal**.
   c. 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.

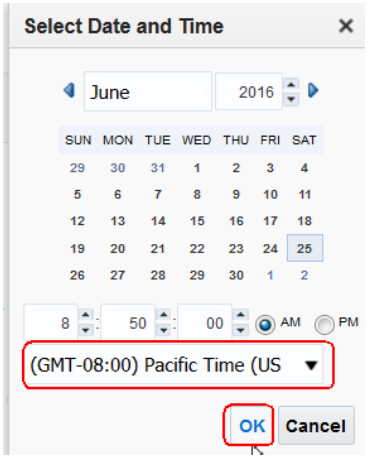


   d. Click the **Schedule** tab.
   e. Set:

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.

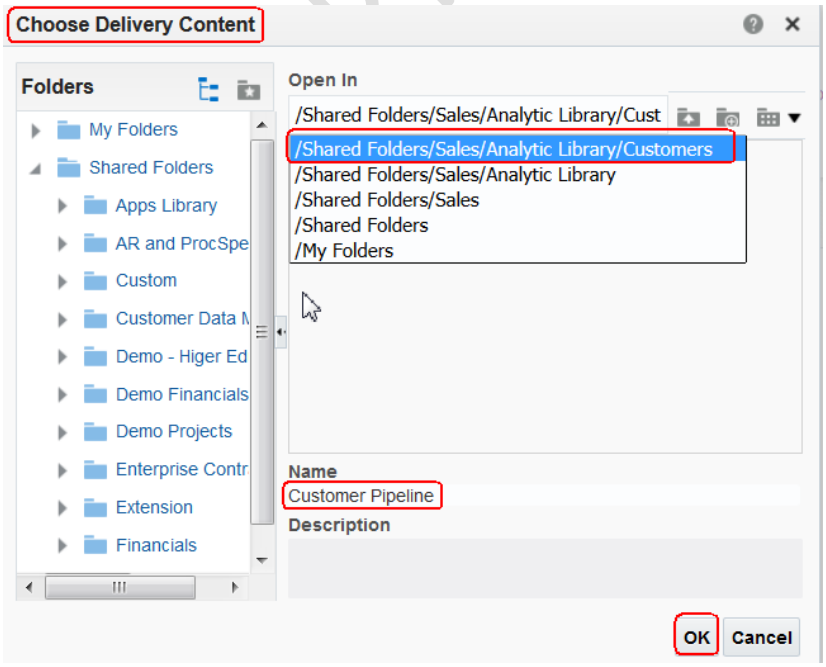
j. Select the report to run.

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.

l. 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.

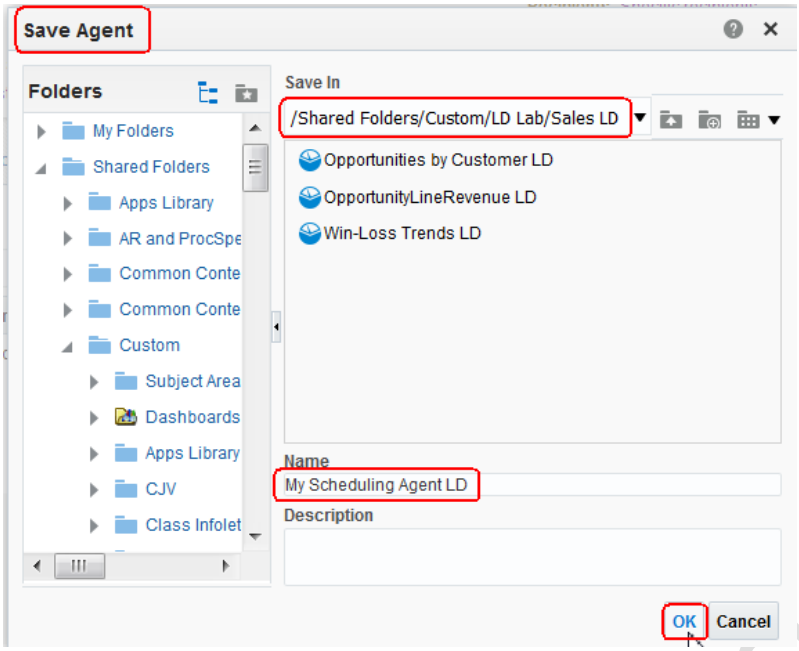
- Home Page and Dashboard delivers the report to the user's home page and dashboard.
- Devices determine to which user devices the report is delivered.

p. Click the **Actions** tab.

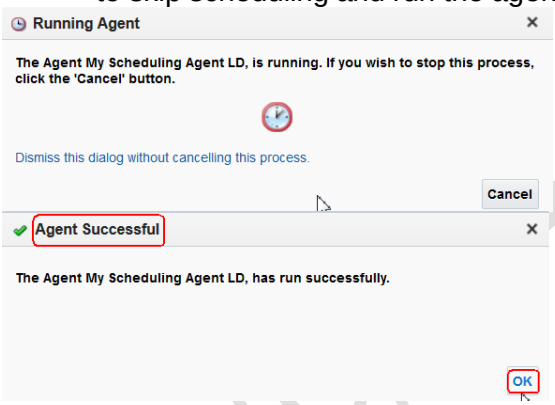
q. Notice that you can add actions to perform when the agent completes. r. In the upper right, click the **Save** icon.

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.

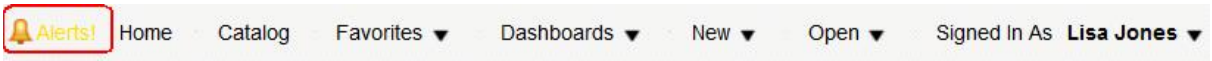


v. You may receive a warning that does not have a valid e-mail address.

w. Click **OK** to dismiss this warning.

4. Verify the results.

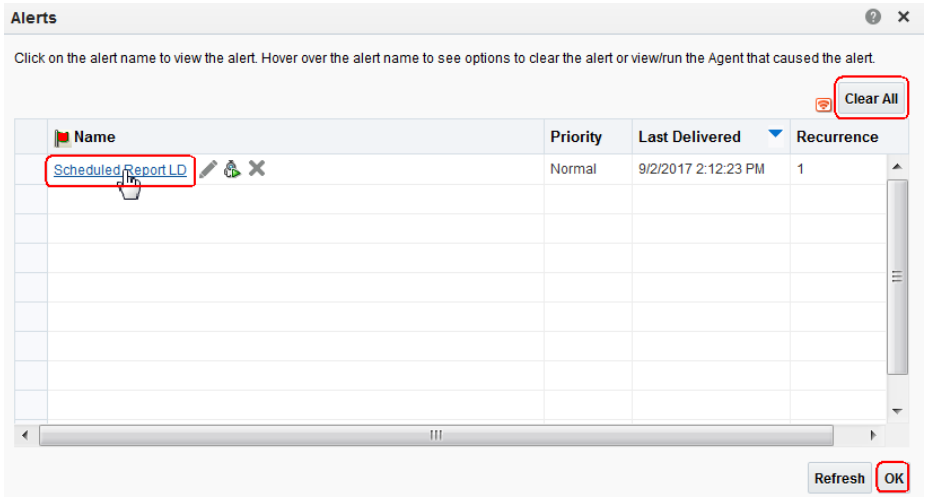
a. Notice that there is a red Alerts link at the top of the page.



b. Click **Alerts**.

c. Verify that **Scheduled Report *nn*** is shown.

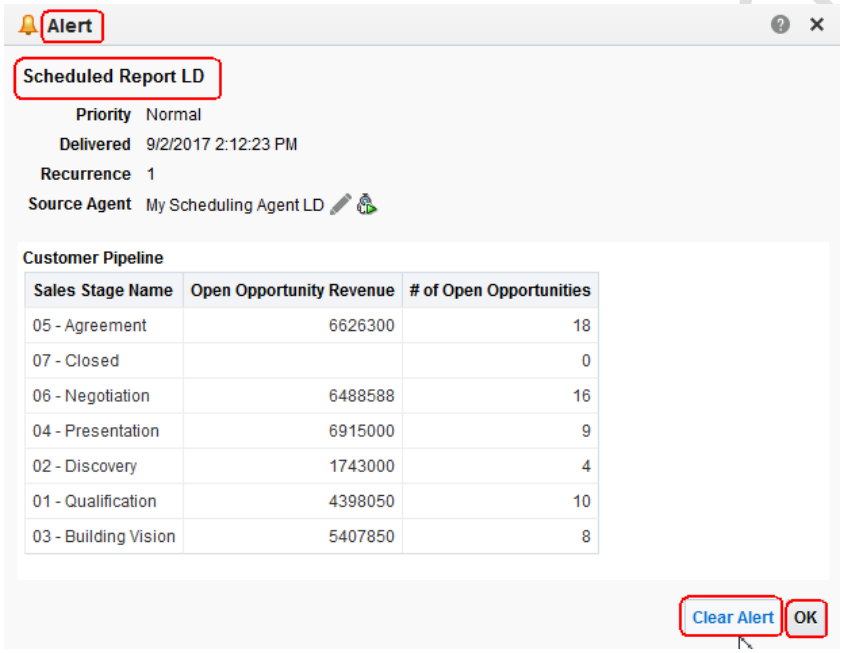
d. Drill down on **Scheduled Report *nn***.



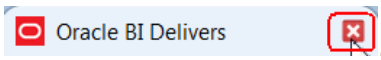
e. Verify that the Customer Pipeline report is displayed.

f. Click **OK**.

g. Click **OK or Clear Alert** to dismiss the Alerts pop-up.



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

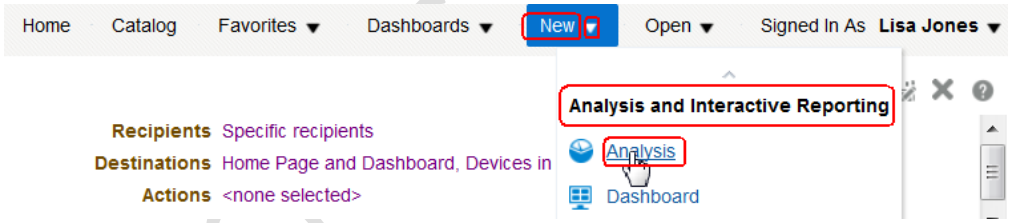
Overview

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.

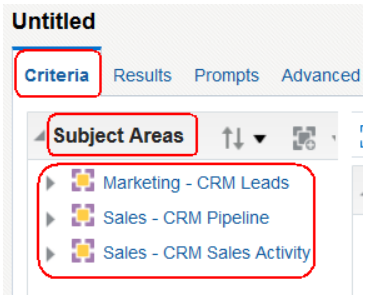
If you must use cross-subject area reports, using common dimensions ensures the measures will be shown at the same granularity level.

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 .
      This opens a new browser tab for Oracle Business Intelligence.
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.

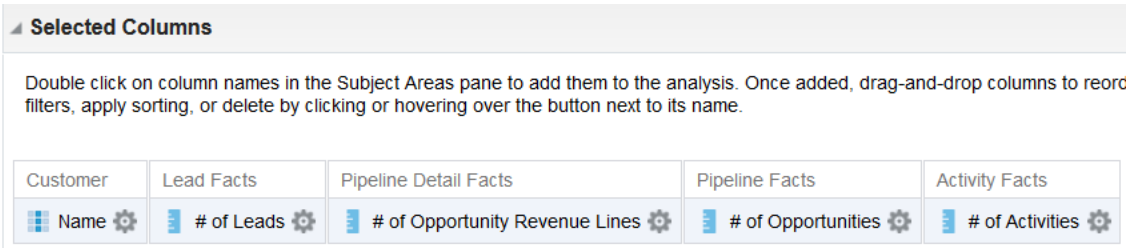
1) In the regional area, under **Sales - CRM Pipeline**, expand **Facts**.
2) Expand **Pipeline Detail Facts**.
3) Drag # **of Opportunity Revenue Lines** into the analysis.
4) Collapse Pipeline Detail Facts.
5) Expand **Pipeline Facts**.
6) Drag # **of Opportunities** into the analysis.
7) Collapse **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

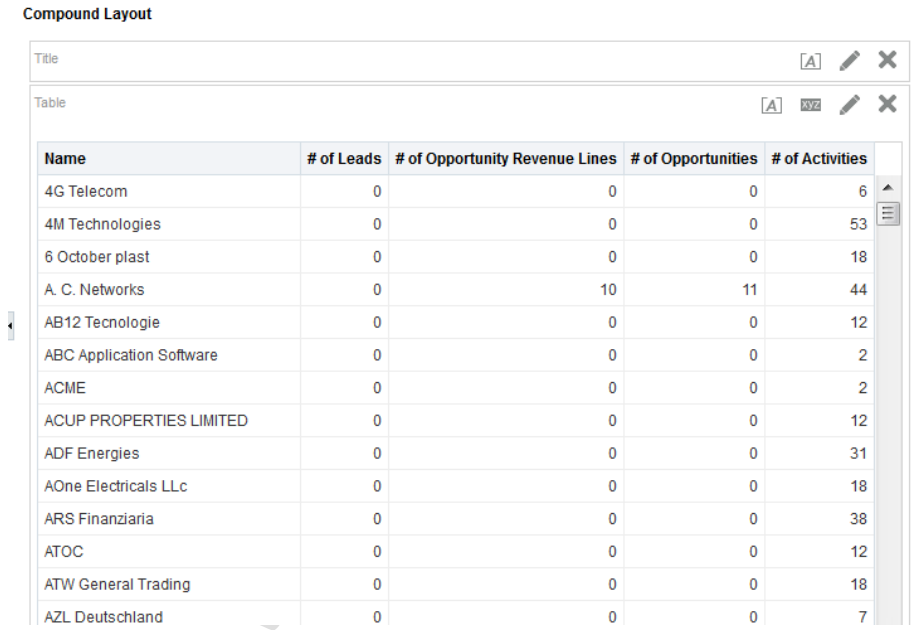
4) Collapse **Activity Facts**.
5) Collapse **Facts**.
6) Collapse **Sales - CRM Sales Activity**.

f. Verify your analysis.



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:



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.

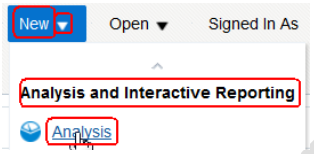
Assumptions

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.

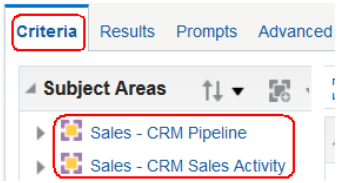
Sign in to the application using **Lisa Jones** login.

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:



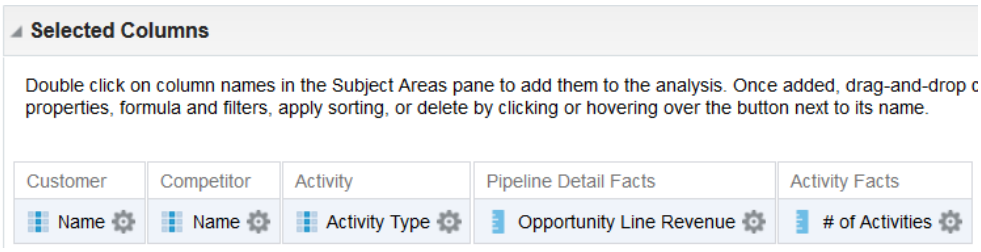
2. Add a **common** dimension to the analysis.
   a. In the regional area, under **Sales - CRM Pipeline**, expand **Customer**.
      Recall that in the previous practice you determined that Customer Name was a common dimension between these two subject areas.
   b. Drag Customer **Name** into the analysis.
   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**.

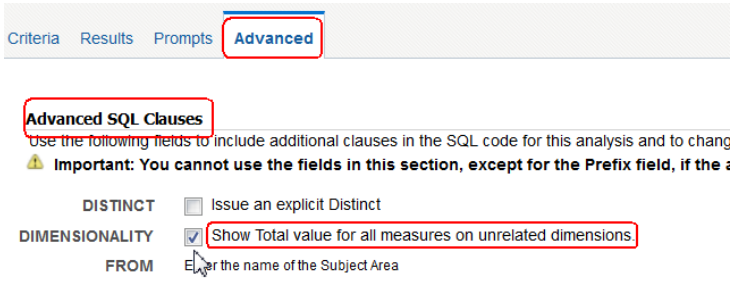
b. Under **Sales - CRM Pipeline**, expand **Competitor**.
c. Drag **Competitor Name** into the analysis.
d. Collapse **Competitor**.
e. Verify that **Activity** is a local dimension for **Sales - CRM Activity**.
   1) Under Sales - CRM Sales Activity verify there is an Activity folder.
   2) Verify that **there is no Activity** folder under **Sales - CRM Pipeline**.

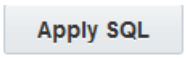
f. Under Sales - **CRM Sales Activity**, expand **Activity**.
g. Drag **Activity Type** into the analysis.
h. Collapse Activity.

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:



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.



c. At the bottom of the Advanced SQL Clauses section, click the **Apply SQL** button 

.

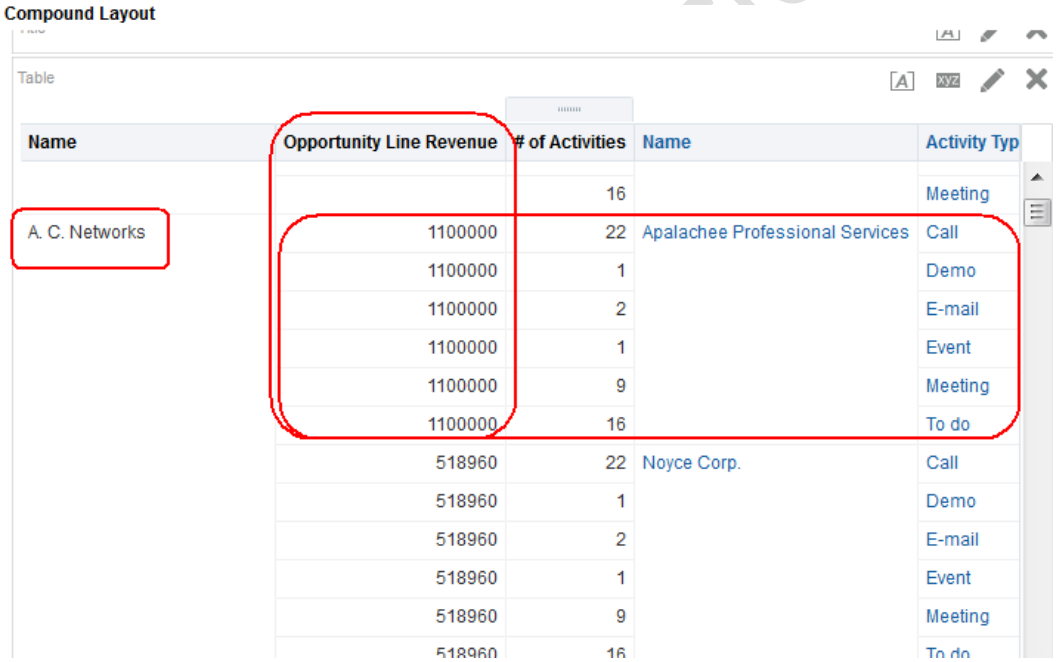
d. Click **OK** to dismiss the warning.

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.



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

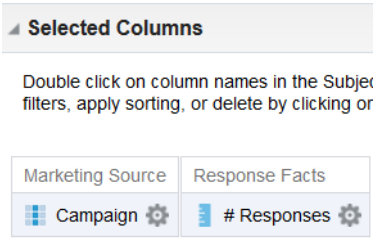
In this practice, you will explore using the Union operation to combine two result sets in a single report.

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.

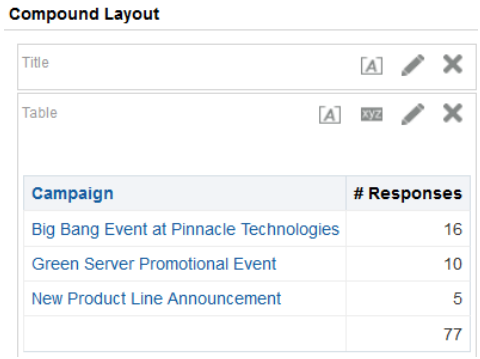
Tasks

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.

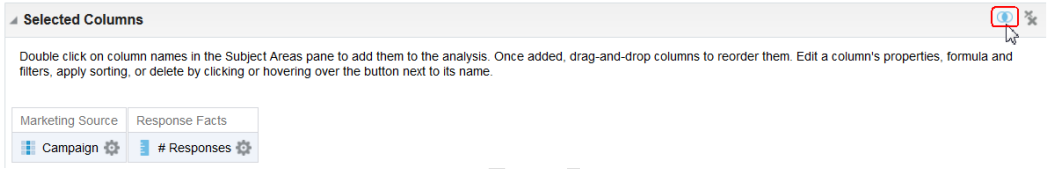


2. Examine the results.
   a. Click the **Results** tab.

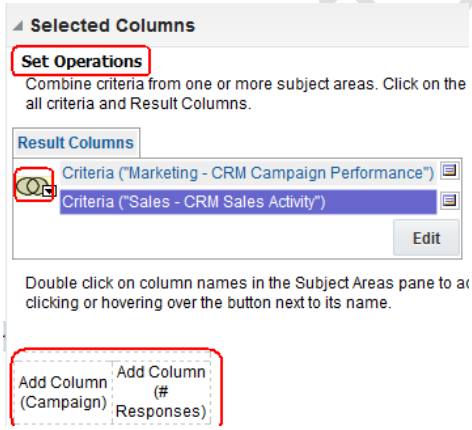
b. Verify that you receive the expected report:



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**.

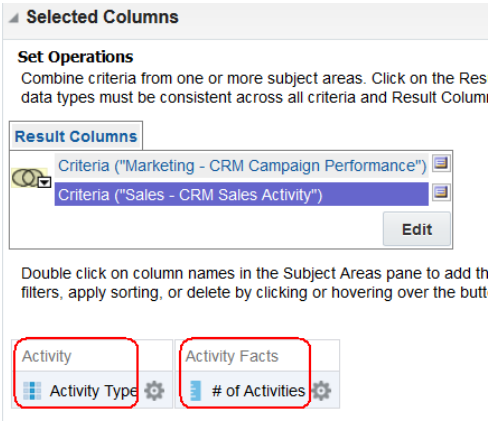


   c. In the **Select Subject Area** list, select **Sales - CRM Sales Activity**.
   d. In the **Result Columns** section, mouse over the **Union/Intersection/Difference** icon and verify that you are using a **union**.

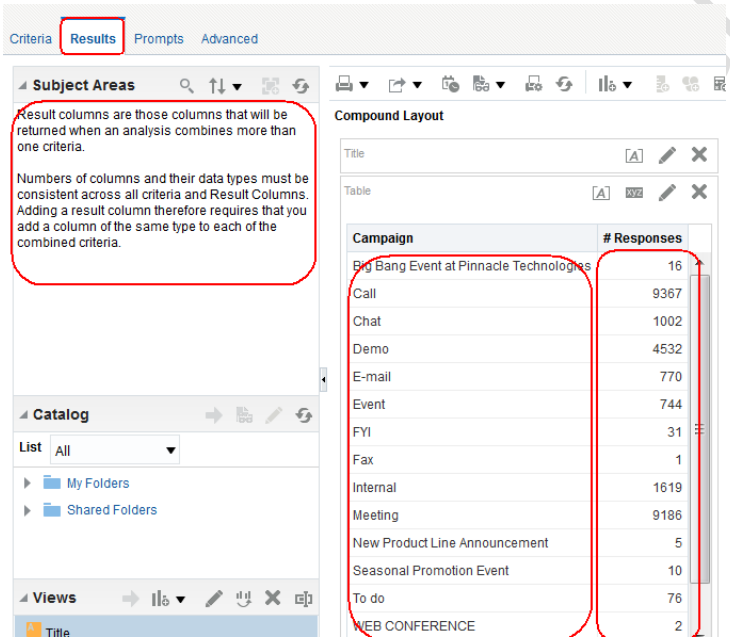


   e. Notice that you are expected to add **two columns**: One to be listed under "**Campaign Name**" and one to be listed under **"# of Responses**".
   f. In the regional area, under **Sales - CRM Sales Activity**, expand **Activity**.
   g. Drag **Activity Type** onto the **Campaign** name column.
   h. Collapse Activity.
   i. Expand **Facts**.
   j. Expand **Activity Facts**.
   k. Drag **# of Activities** onto the **# of Reponses column.**

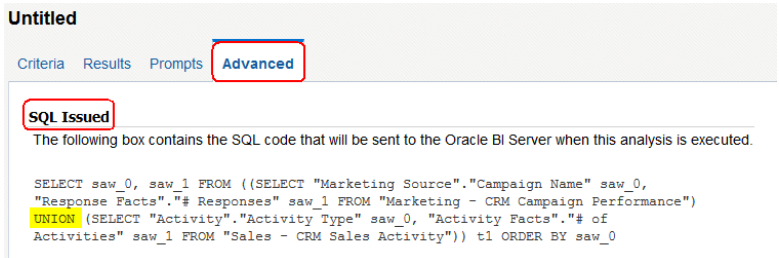
l. Verify your criteria:



4. Examine the results.
   a. Click the **Results** tab.
   b. Verify that activity types and numbers of such activities are added to the report:



   c. Examine the **SQL**.
      1) Click the **Advanced** tab.
      2) Examine the "SQL Issued" section and verify that it is indeed a UNION.



5. Sign out of the application.

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