# Oracle Business Approvals for Sales Managers

User Guide

Release 1.1

**Part No. E15592-01**

August 2009

ORACLE

Oracle Business Approvals for Sales Managers User Guide Release 1.1
E15592-01
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# Overview

This chapter includes the following topics:

- About Oracle Business Approvals for Sales Managers
- Product Licensing

## About Oracle Business Approvals for Sales Managers

Oracle Business Approvals for Sales Managers delivers targeted and task-oriented information to help managers make informed decisions and take action immediately and securely from their iPhones.

Oracle Business Approvals for Sales Managers (hereafter referred to as Sales Managers) enables you to evaluate, approve, or reject pending sales quotes from Siebel Sales Quotes applications. A list of pending quotes awaiting your review is contained in a worklist in the Sales Managers application.

Optionally, you can set up Sales Managers to retrieve custom or pre-defined analytic reports related to the sales quotes that you are reviewing. This configuration retrieves data from Oracle Business Intelligence Suite Enterprise Edition Plus (Oracle BI EE Plus) or Oracle Business Intelligence Applications.

The security and performance of the application are enhanced with the support of SSL encryption protocol and optionally Oracle's Identity Management.

## Product Licensing

To download the application on the iPhone, you must agree to the terms of the Oracle Business Approvals for Sales Managers license agreement. You can access the license agreement when you download the application.

In addition, Oracle Business Approvals for Sales Managers requires the licensing of a server product called Oracle Business Approvals Connector for Managers. This connector provides secure and robust integration with Oracle E-Business Suite applications using Oracle SOA Suite and optional Oracle BI EE Plus technologies. Oracle Business Approvals Connector for Managers can be licensed directly from Oracle.

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# Setting Up Sales Managers

This chapter includes the following topics:

- Prerequisites
- Configuring Sales Managers Application Settings
- Configuring Access to Oracle BI EE Plus Analytics (Optional)

## Prerequisites

Before you can configure Oracle Business Approvals for Sales Managers, a system administrator must:

- Install the Oracle Business Approvals Connector for Sales Managers.
- Configure the SOA Suite to interact with the application.

  See the *Oracle Business Approvals Connector for Sales Managers Configuration Guide* for instructions for these prerequisites.

## Configuring Sales Managers Application Settings

The application settings for Sales Managers include BPEL settings, worklist type settings, and an option to enable debugging. In addition, you can specify the format and language of the interface by modifying the iPhone's Language Preference settings. See "Setting Language Preferences" in this section for more information.

### BPEL Settings for the Server

The BPEL settings include the endpoint URL to the server that provides the interaction with Oracle Siebel and login credentials that you use to access Oracle Siebel. The endpoint URL is a site specific location and should be provided by your system administrator.

### Worklist Type Setting

Sales Managers supports the Sales Quotes worklist type, which you must enable in the application settings before you can use the application.


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### Debug System Setting

When enabled, the Debug system setting provides detailed logging that you can use to troubleshoot connectivity or other issues. Oracle recommends that you disable the Debug setting when not troubleshooting the application.

**Note**: The application settings also contain an Analytics Settings section. These settings are optional and enable users to access Oracle BI EE Plus analytic reports and view them directly from Sales Managers. See "Configuring Access to Oracle BI EE Plus Analytics" in this guide for more information.

To configure the Sales Managers application settings:

1. On the iPhone, tap the Settings button.

2. On Settings, tap Sales Mgrs.

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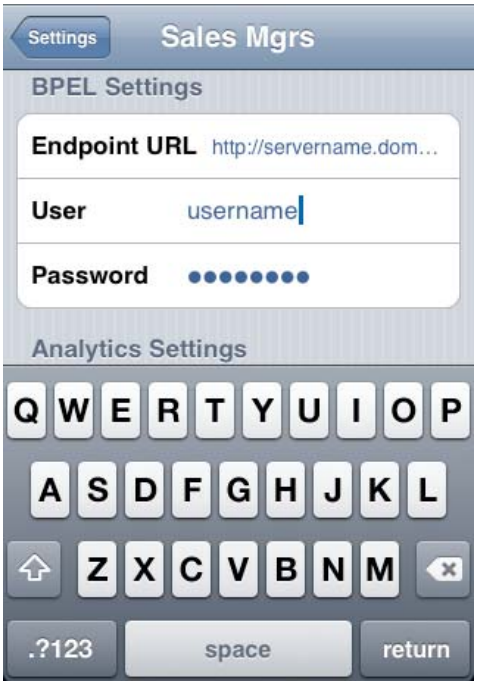


3. In the BPEL Settings section, tap the Endpoint URL field and enter a URL in this format:

   http://*servername.domain.com*:*port*/orabpel/*domain*

   **Note**: If the access is over a secure sockets layer (SSL) protocol, the URL begins with https.

   This table provides a description of each variable in the URL:

| Variable | Description |
|---|---|
| servername.domain.com | The name of the server machine on which the web services are deployed.<br>This may be a short name (servername), a fully qualified name (servername.domain.com), or an IP address (for example, 10.0.1.251). |
| port | The TCP/IP port on which the web services are listening.<br>If the web services have been deployed on the default HTTP port 80 this may be omitted, as in this example:<br>`http://server.domain.com/orabpel/domain`<br>If HTTPS (SSL) is being used and the services have been deployed on the default HTTPS port 443 the URL will look like<br>`https://server.domain.com/orabpel/domain`.<br>Otherwise the URL will contain the port used, for |


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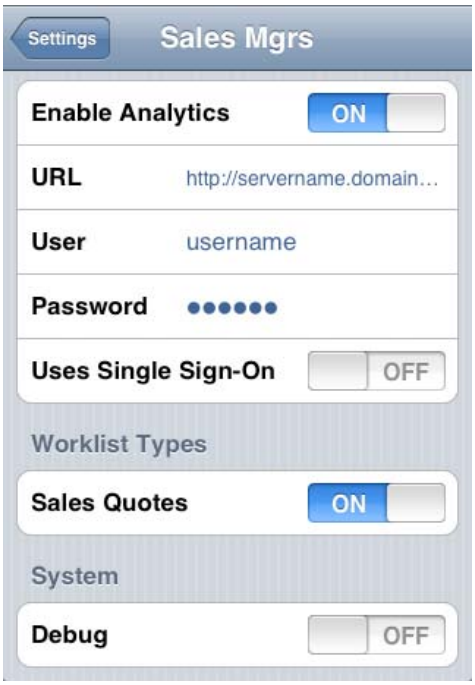
| | |
|---|---|
| | example if the web services are using HTTPS listening on port 8080 the url would be `https://server.domain.com:8080/orabpel/domain` |
| domain | The name of the BPEL domain on which the web services are deployed.<br>BPEL is configured with a default domain using the name "default," as in this example:<br>http://*server.domain.com*:*port*/orabpel/default<br>If the services were deployed to an alternate domain, use the name of that domain instead. |

4. Enter your sign-on credentials in the following fields:

| Field | Value |
|---|---|
| User | Enter the same user name that you use to access Oracle Siebel. |
| Password | Enter the password associated with your user name. |
| Uses Single Sign-On | Slide to ON to specify if single sign-on is enabled on the server. The default setting for this option is OFF. |

5. Scroll down to the Worklist Types section.

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6. In the Worklist Types area, slide the switch to ON next to the Sales Quotes worklist type to enable it.

   You must enable this worklist for the application to function properly.

7. For the Debug setting, slide the switch to ON to enable logging.

   By default, the setting for the Debug option is OFF.

### Setting Language Preferences

To fully utilize Sales Managers for a given locale, it is recommended that you configure the region and language settings on your iPhone. Sales Managers supports several region and language formats that are available on the iPhone. When you modify these settings, the Sales Managers interface reflects the selected language, with the exception of data related elements such as worklist items, reports, and so forth.

See the iPhone help for instructions on how to modify the region and language settings.

**Important!** The language format that you select on the iPhone must be supported in Oracle Siebel. Refer to the language setting in your Oracle Siebel environment. For more information, see the *Siebel Business Applications' Siebel Installation Guide* (for various OS platforms) and the *Siebel Application Deployment Manager Guide*.

In addition, if you chose the optional configuration to enable the viewing of reports in Sales Managers, then the language format must be supported on the Oracle BI Server as well. Refer to the language setting in your Oracle BI Server environment. For more information, see the *Oracle Business Intelligence Server Administration Guide*.

## Configuring Access to Oracle BI EE Plus Analytics (Optional)

This section includes an overview and the following topics:

- Considerations for Viewing Charts on the Mobile Device
- Setting Up Analytics in Oracle BI EE Plus for Sales Managers
- Configuring Sales Managers to Access Oracle BI Analytics
- Context Passing

### Overview

The Analytics Settings in Sales Managers enable access to analytic reports in Oracle BI EE Plus. In Oracle BI EE Plus, you can create a custom set of reports and associate them with a worklist in Sales Managers. The reports provide the business data you need to make an informed decision.

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## Considerations for Viewing Charts on the Mobile Device

The iPhone device does not currently support Flash components in Web pages. To enable viewing charts on the mobile device, you must configure the Oracle BI Server to display charts using the PNG graphic format. The PNG format is a simple graphics format and does not support all the interactivity provided by the Flash or SVG formats.

To enable PNG rendering, add the following to the <ServerInstance> section of the instanceconfig.xml file:

```
<Charts>
      <DefaultImageType>PNG</DefaultImageType>
</Charts>
```

The instanceconfig.xml file is located in this directory:

\\DATADIR\web\config

In addition, Oracle recommends that you install and configure a second presentation server for serving content specifically to mobile devices so that PNG chart rendering applies only to mobile devices.

## Setting Up Analytics in Oracle BI EE Plus for Sales Managers

On the Oracle BI Web client, use Manage Catalog to associate new or existing analytic reports to the worklist in Sales Managers. You can place analytic reports in subfolders in either of these locations:

- My Folders – Contains reports that only you can access.
- Shared Folders – Contains reports that users with the appropriate permissions can access.

In My Folders or Shared Folders, you create a new folder named _iPhone, and then create subfolders based on the approval type with which you want to associate analytic reports. The folder that you set up for Sales Managers is case sensitive. It is hard coded and must be named:

SALES_QUOTE

Each analytic report in the SALES_QUOTE folder appears as an available analytic report in the Sales Managers application on the iPhone. Any subfolders and items contained within them are not available in Sales Managers. These items typically include saved reports or symbolic links to reports located elsewhere in the repository.

This is an example of the folder configuration in the Oracle BI Manage Catalog for Sales Managers:

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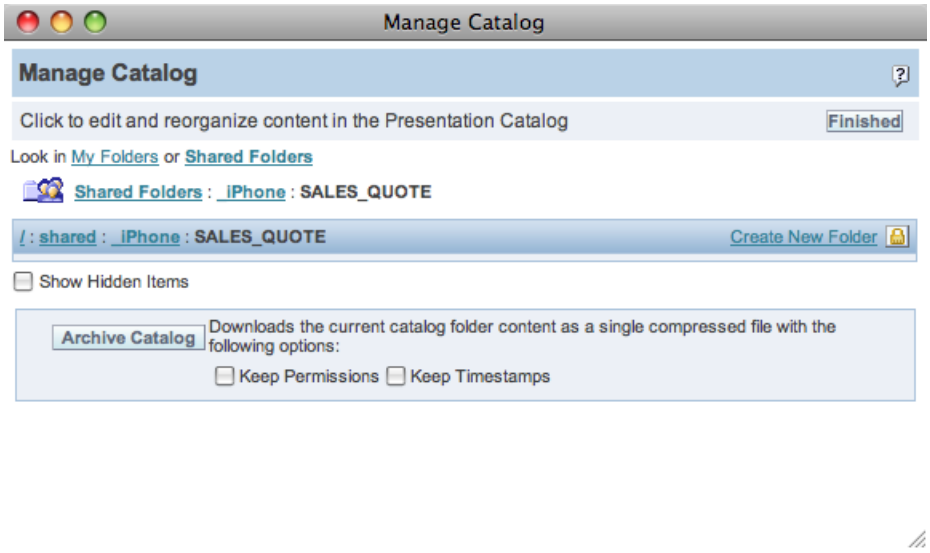


Oracle BI Manage Catalog – Folder for Sales Managers application

## Configuring Sales Managers to Access Oracle BI Analytics

Configure the Sales Managers application settings on the iPhone to enable access to analytic reports in Oracle BI EE Plus.

To configure Sales Managers to access Oracle BI analytics:

1. On the iPhone, tap the Settings button.
2. On Settings, tap Sales Managers.


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3. In the Analytics Settings section, slide the Enable Analytics switch to ON.
4. Tap the Endpoint URL field and enter the URL for accessing the Oracle BI Server, as in this example:

   `http://servername.domain.com:port/analytics`

   **Note**: If the web services are accessed over a secure sockets layer (SSL) protocol, then the URL will begin with https.

   This table provides a description for each variable in the URL:

| Variable | Description |
|---|---|
| servername.domain.com | The name of the server machine on which the Oracle BI Server is running.<br>This may be either a short name (servername), a fully qualified name (servername.domain.com), or an IP address (10.0.1.251). |
| port | The TCP/IP port on which the Oracle BI Server is listening.<br>If the Oracle BI Server has been deployed on the default HTTP port 80 this may be omitted, as in this example:<br>http://server.domain.com/analytics<br>If HTTPS (SSL) is being used and the Oracle BI Server has been deployed on the default HTTPS port 443 the |

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| | |
|---|---|
| | URL will look like:<br>https://server.domain.com/analytics<br>Otherwise the URL will contain the port used, for example if the Oracle BI Server is using HTTPS listening on port 8080 the url would be:<br>https://server.domain.com:8080/analytics |

5. Enter the proper credentials in these fields:

| Field | Value |
|---|---|
| User | Enter the same user name that you use to access the Oracle BI Server through the desktop. |
| Password | Enter the password associated with your Oracle BI Server user name. |

**Note**: The user and password values might be case sensitive, so ensure that you enter them exactly as you would when logging in through the browser client.

6. If the server uses Oracle Single Sign-On, then slide the Uses Single Sign-On switch to ON.

   When enabled, the application uses Oracle SSO to authenticate the user.

## Context Passing

Oracle Business Approvals for Sales Managers supports passing context from the iPhone to the Oracle BI Server. Context passing provides more relevant analytics for the approval being viewed. Any of the header fields for an approval, as shown in the following example, can be passed to the Oracle BI Server:


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Worklist Details – Header Information

Context passing works in a similar manner as presentation variables, with some minor differences. When an analytic report is accessed, Sales Managers performs the following tasks:

- Retrieves the report definition (XML) for the report.
- Iterates through each of the header fields of the approval being viewed. Each header field is identified with a key string. If the report contains one or more instances of the string `@{key},` the actual value is substituted for this placeholder.

The modified report is submitted to the Oracle BI Server and the results are displayed on the mobile device.

An example of context passing and a list of available keys for the Sales Quote worklist is provided in "Appendix B: Additional Information about Context Passing" in this guide.

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# Using Sales Managers

This chapter includes an overview and the following topics:

- Viewing Worklist Items
- Requesting More Information
- Approving Worklist Items
- Rejecting Worklist Items
- Viewing Related Analytics (Optional)

## Overview

Sales Managers enables you to view, approve, or reject sales quotes from Siebel CRM.

Sales Managers stores approval requests in a worklist. The approval requests are also referred to as worklist items.

For each item awaiting approval in the worklist, Sales Managers provides additional information, including detail lines and any available historical information. If you need more information than is available before determining whether to approve or reject the worklist item, you can submit a request for more information from the person who submitted the item for approval.

In addition, when you approve or reject a worklist item, you can add a comment about the reason for your decision.

## Viewing Worklist Items

Sales Managers enables you to sort the worklists by:

- Start Date

  You can change the display to view all worklist items by their start dates.

- Due Date

  You can change the display to view all worklist items by their due dates.

- Closed

  You can view worklist items that have been previously approved or rejected.


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After you select an item in the worklist, Sales Managers displays more information about the item, such as:

- Detail lines

  The detail lines provide information about the items contained within the approval, for example for an expense report, the detail lines contain each item entered in the expense report.

- History

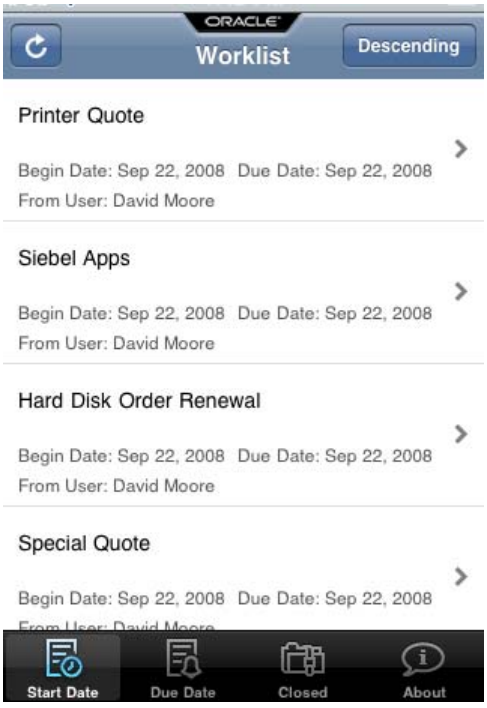
  History provides information about the past activity of a worklist item, for example the timestamp and user name of the person who entered the approval and previous approvers, if any.

- Related reports (if available)

  The reports provide related data displayed in charts or graphs to support the decision making process. See "Viewing Related Analytic Reports" in this guide for more information.

To view worklist items:

1. On the iPhone, tap the Oracle Sales Managers application icon.




2. On Worklist, tap any of the following options at the bottom of the page to determine how the application displays pending worklist items:

   Start Date

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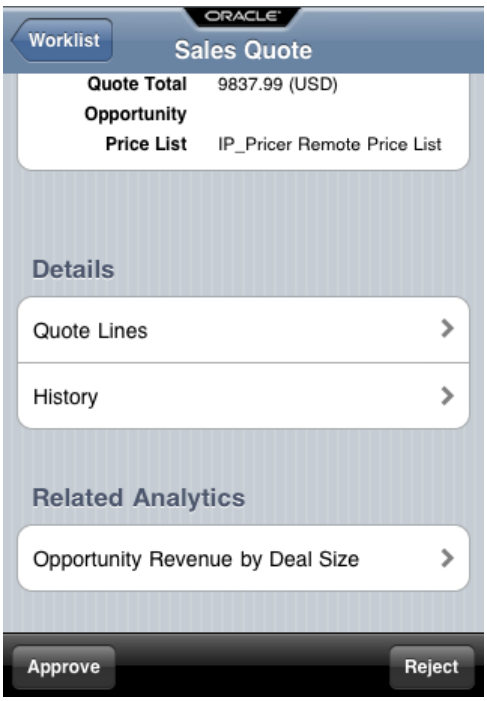
Due Date

Closed

3. Tap the worklist item that you want to view.




4. In the Details section, tap any of the available menus to view additional details about the worklist item.
5. After reviewing the information, tap the button in the upper-left corner of the page to return to the worklist item.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Example of detail lines

## Requesting More Information

To request more information about an item in a worklist:

1. On the Worklist page, tap the worklist item.
2. On the worklist header page, tap the Request More Info button.

3. Select the user from whom you wish to request more information.
4. Enter your comments and tap Done.

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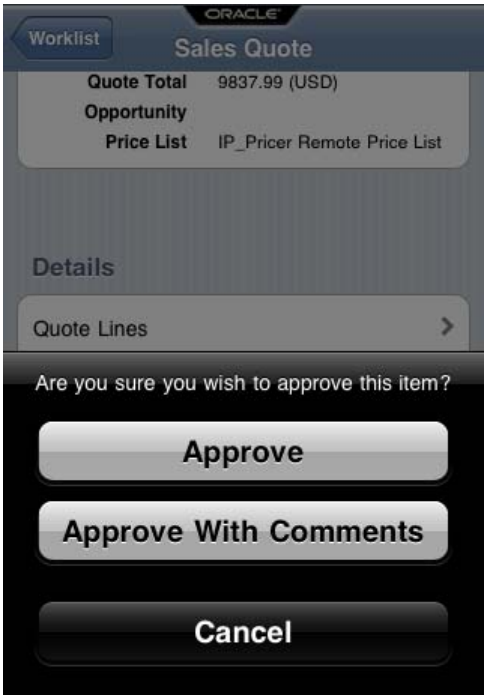
Sales Managers sends the worklist item with your comments to the user's worklist.

## Approving Worklist Items

To approve items in a worklist:

1. On the Worklist page, tap the worklist item.
2. On the worklist header page, tap the Approve button.




3. Tap Approve to approve the item.
4. If you want to add comments to the approval, tap Approve With Comments.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5. Enter your comments and then tap Done to send the approval.

   Sales Managers sends an approval message to the source application and removes the item from the worklist.

## Rejecting Worklist Items

To reject items in a worklist:

1. On the Worklist page, tap an item in the worklist.
2. On the worklist header page, tap the Reject button.
3. Tap Reject to reject the approval.

   Sales Managers sends a rejection message to the source application and removes the item from the worklist.
4. If you want to add a comment to the rejection, tap Reject With Comments.
5. Type your message and then tap OK to send the rejection.

Sales Managers sends a rejection message to the source application and removes the item from the pending worklists.

## Viewing Related Analytics (Optional)

If you configured the Sales Managers application settings to access analytic reports in Oracle BI EE Plus, you can view analytics reports related to worklist items directly on the iPhone. The reports provide the business data you need to make an informed decision. For example, before deciding whether or not to approve a sales quote, you can access a report that displays a comparison of products that have been quoted previously by the same requester to ensure the discounts are inline with the average.

You can also forward reports to others. When you forward a report, Sales Managers sends an e-mail that contains a link to the report that when clicked, launches the report in a Web browser. The recipient does not have to be a Sales Managers user to view the report.

To view related analytics:

1. On the Worklist page, tap a worklist item.
2. On the worklist header page, scroll down to the Related Analytics section.

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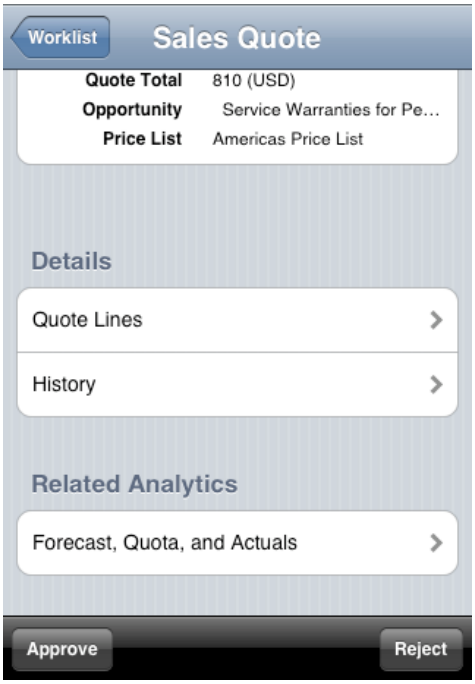


3. Tap the report that you want to view.
4. On the Analytics page, perform any of these operations to work with the report:

   Double-tap the report to zoom in or zoom out of the data.

   Turn the iPhone 90 degrees for a wider view of the data or chart.

   Tap the Refresh button at the bottom of the screen to refresh the data.

   Tap the Cancel button (X icon) to stop the loading of a report that is currently loading.

   Tap the Forward Report button (pencil icon) to forward the report. See "To forward a report" for more information.
5. Tap the button in the upper-left corner of the page to return to the worklist header page.

To forward a report:

1. On the Results screen, tap the Forward Report button at the bottom of the screen.

   The e-mail screen appears with a link to the report in the body of the e-mail.


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2. In the To field, enter the e-mail addresses of the recipients.
3. Tap the subject or the body of the e-mail to enter any additional text.
4. Tap the Send button.

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# Appendix A: Troubleshooting

This appendix includes the following topic:

- Troubleshooting Configuration Issues

## Troubleshooting Configuration Issues

This section details some common problems related to Sales Managers and suggests possible solutions.

**Symptom/Error – Missing BPEL Configuration**

If you attempt to run the approval applications prior to configuring the BPEL Endpoint URL, you will receive the following message:

You will also receive this message if the endpoint URL is configured but the credentials are not configured.

**Possible Solution**

Access the Sales Managers application settings and configure the BPEL endpoint URL and user credentials.

**Symptom/Error – Worklist Types Not Selected¶**

If you did not enable at least one worklist type, you will receive the following message:


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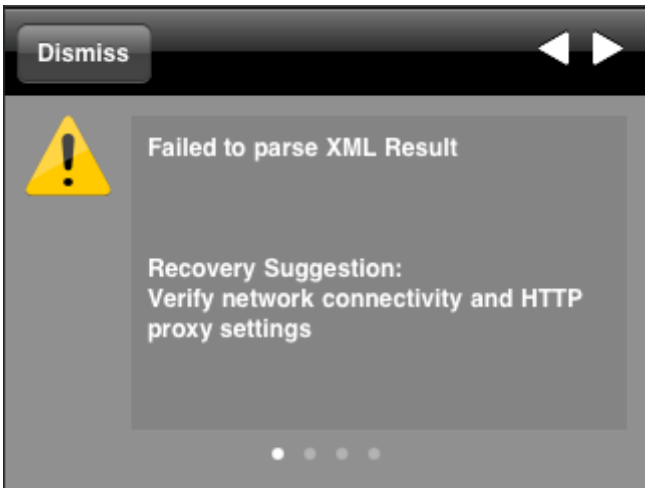
**Possible Solution**

Access the Sales Managers application settings and enable at least one approval type.

**Symptom/Error – Failed to Parse XML**

The following "Failed to parse XML Result" error appears:




You receive this error once for each configured worklist type.

The application received some unexpected HTTP content from the configured URL. Verify that the endpoint URL is correct by performing these steps:

1. Launch Safari on the mobile device.
2. Enter the configured Endpoint URL into the address bar.
3. Verify that you receive a page containing the following content:

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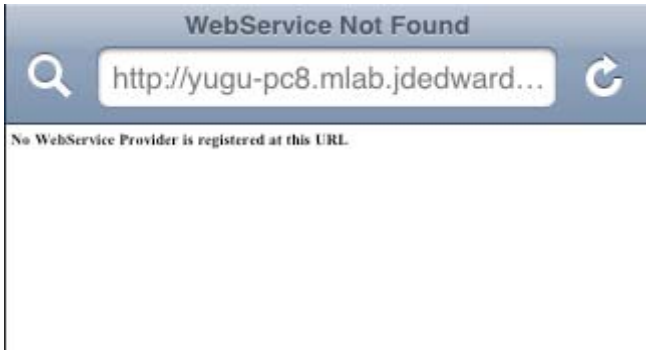


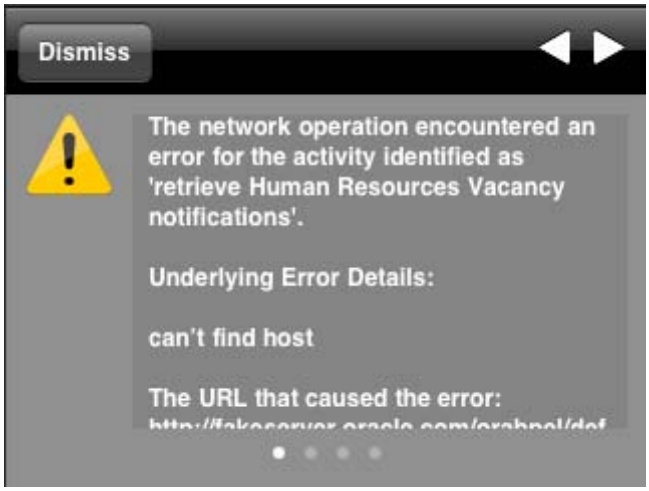

If you did not receive a page that contains this message – "No WebService Provider is registered at this URL," then the endpoint URL is not correct.

**Possible Solution**

In the Sales Managers application settings, enter the correct endpoint URL for the BPEL server.

**Symptom Error – Can't Find Host**

An error appears that has an underlying cause "can't find host." You receive this error once for each configured worklist type:




The application was unable to resolve the configured host name in the BPEL endpoint URL, or the specified port was not valid. Verify the endpoint URL is correct by performing these steps:

1. Launch Safari on the mobile device.
2. In the address bar, enter the configured endpoint URL.
3. Verify you receive a page that contains this message: No WebService Provider is registered at this URL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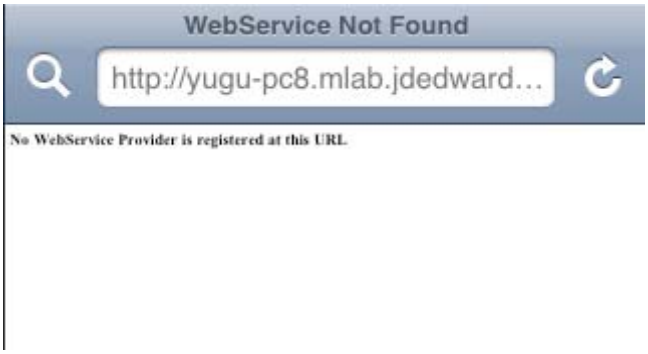



Verifying Web Service

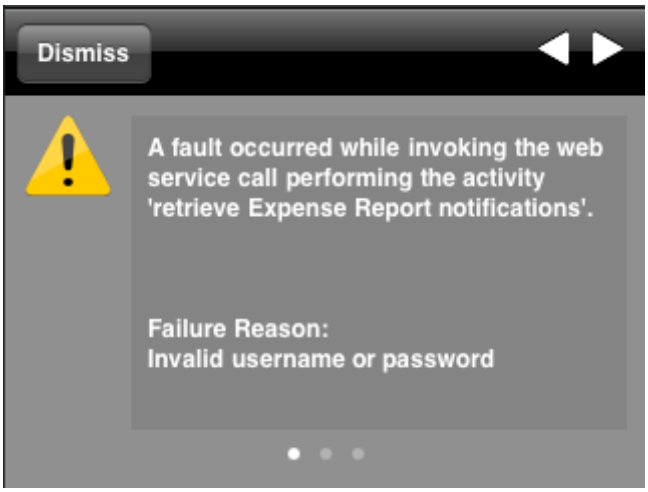
If you did not receive a page containing the text – "No WebService Provider is registered at this URL," the endpoint URL is not correct.

**Possible Solution**

In the application settings, enter the correct endpoint URL for the BPEL server.

**Symptom/Error – Can't Find Host**

An error appears that has an underlying cause "invalid username or password:"




You receive this error once for each configured worklist type.

**Possible Solution**

In the Sales Managers application settings, enter the proper credentials.

**Symptom/Error**

Invalid Domain

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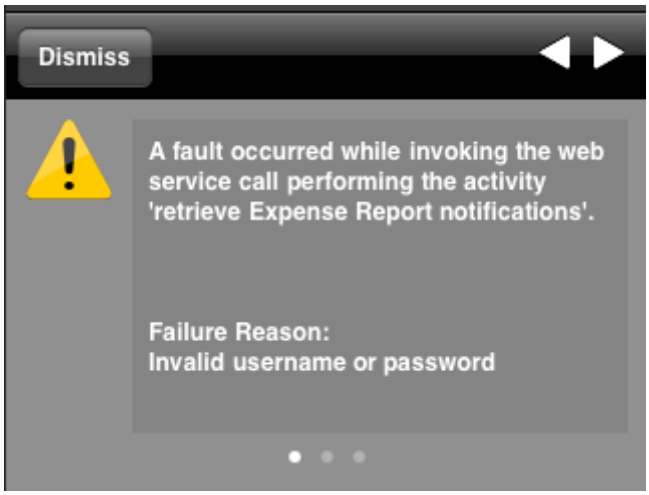
An error appears that has an underlying cause “ORABPEL-02052” and contains a message similar to “The BPEL domain ‘domainname’ cannot be found.”




**Note**: The error code and message may vary slightly. You receive an “Invalid Domain” error message once for each configured worklist type.

**Possible Solution**

The domain portion of the configured BPEL endpoint URL is not correct. In the application settings, enter the correct endpoint URL for the BPEL server.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# Appendix B: Additional Information about Context Passing

This appendix includes the following topics:

- Example of Context Passing
- Header Variables for Context Passing

## Example of Context Passing

The example in this section describes how to configure a report in Oracle BI Answers to use context passing from Sales Managers. Context passing enables Sales Managers to retrieve analytics from Oracle BI EE Plus based on the header field values in a particular sales quote.

Before approving a sales quote submitted by an employee, the Sales Managers user wants to see a report that shows the average item discounts the employee has previously quoted. This example uses the following existing report, which shows the average discount by employee for all employees:

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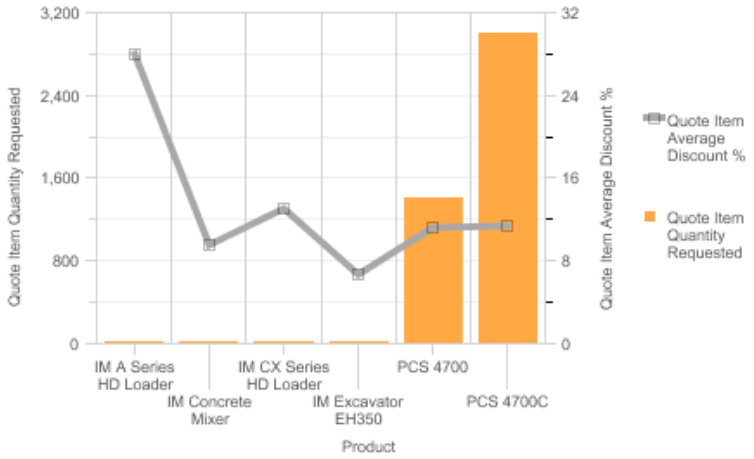
**Average Discount by Employee**




| Full Name | Product | Quote Item Average Discount % | Quote Item Quantity Requested |
|---|---|---|---|
| David Moore | IM A Series HD Loader | 40 | 1 |
| | IM Concrete Mixer | 30 | 6 |
| | IM CX Series HD Loader | 35 | 3 |
| | IM Excavator EH350 | 40 | 1 |
| Jack Nichols | PCS 4700 | 8 | 400 |
| Joseph Armstrong | PCS 4700 | 14 | 1,000 |
| | PCS 4700C | 11 | 3,000 |

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Average Discount by Employee report

The steps describe how to use context passing so that the report shows figures based on the employee who submitted the sales quote for approval.

To configure context passing for this example, perform these steps:

1. In Oracle BI Answers, save the existing report in the proper folder in the repository, as described previously in the "Setting Up Analytics in Oracle BI EE Plus for Sales Managers" section of this guide.

   For sales quotes, place the report in the SALES_QUOTE folder.


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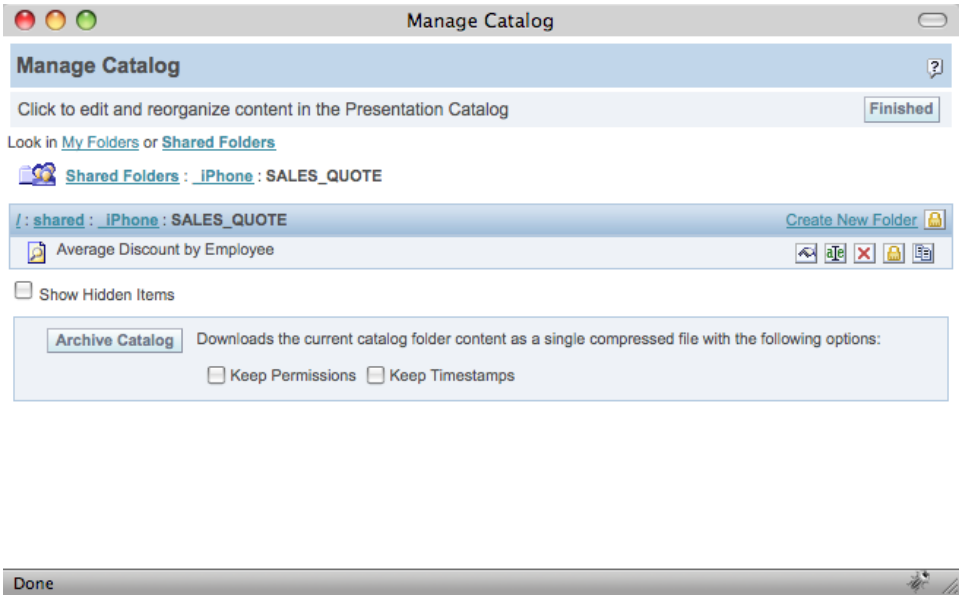
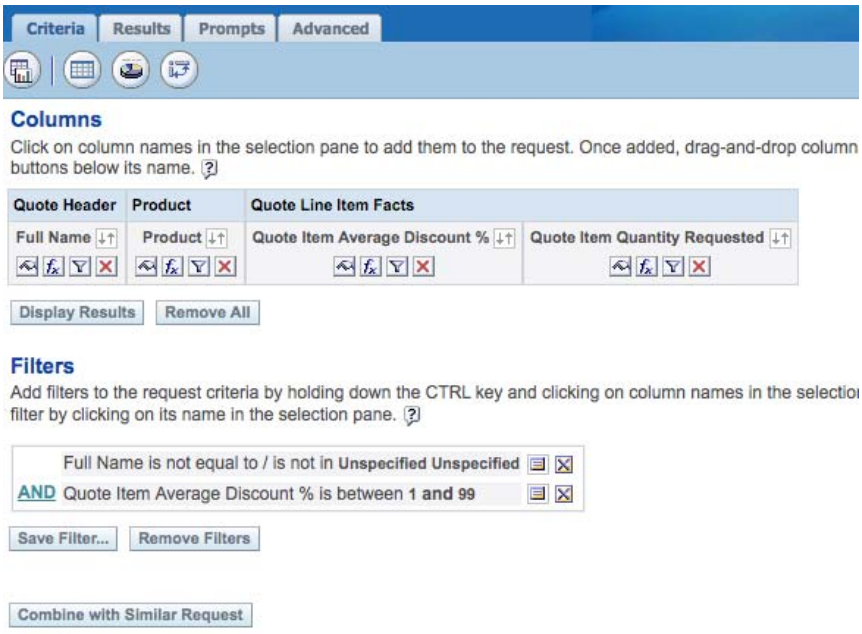



2. Open the report in Oracle BI Answers.

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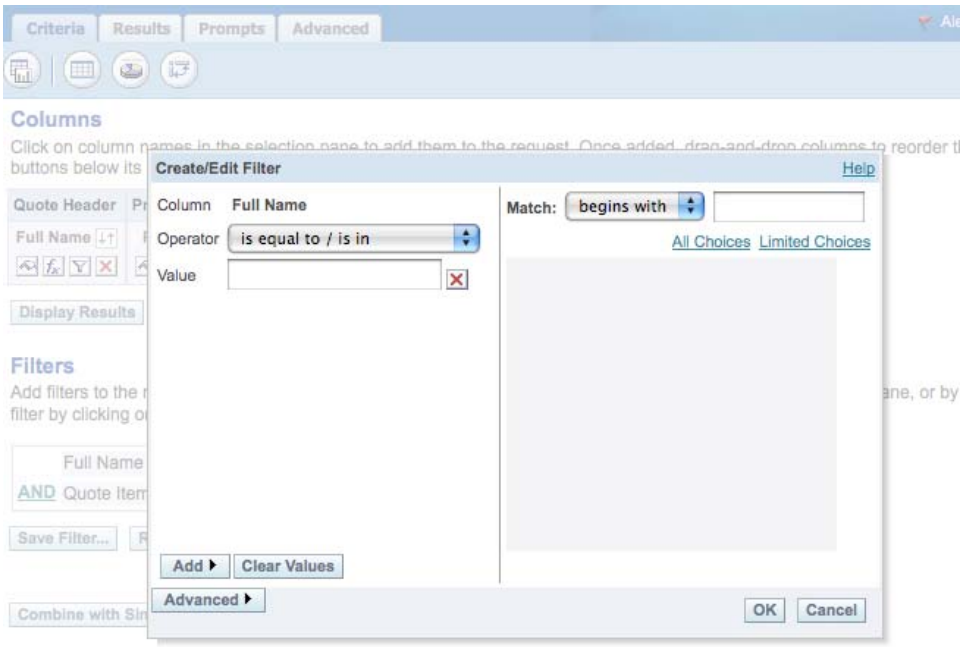
3. Add a new filter to the Full Name column.




4. Click the Advanced button and then select the "Convert this filter to SQL" option.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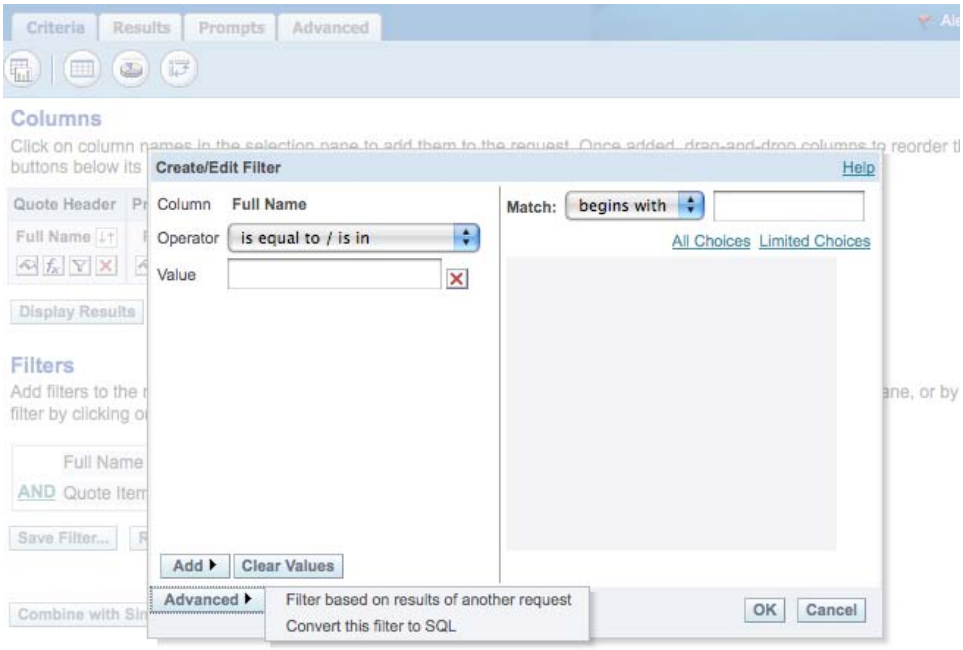
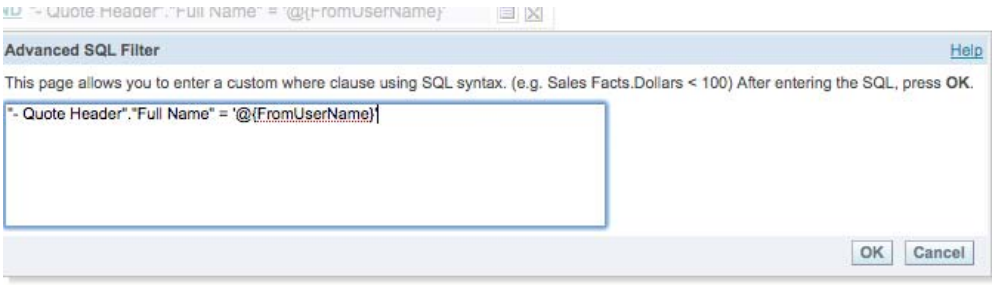



5. Using the list of header variables located in the "Header Variables for Context Passing" section of this appendix, locate the name to use to represent the requester of the sales quote approval.

   In this example, the FromUserName header variable is the correct name to use. Enter this variable into the Advanced SQL Filter in Oracle BI Answers using the syntax @{FromUserName}.




6. Save the report.

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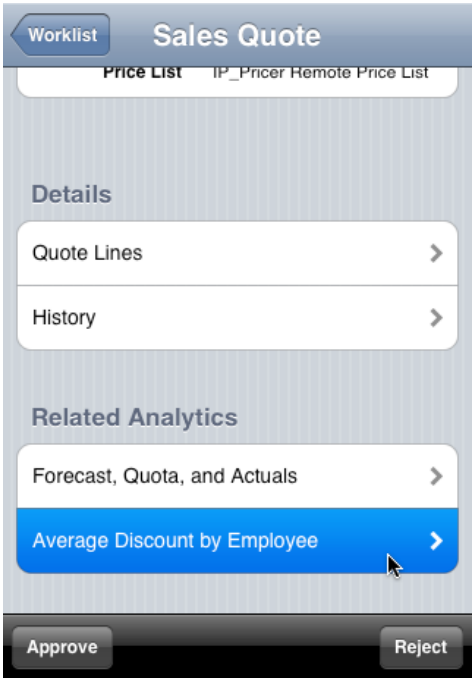
7. In the Sales Managers application on the iPhone, verify the filter is properly working by selecting the appropriate report, which in this example is Average Discount by Employee.select a sales quote worklist item.




The Sales Managers application displays the report.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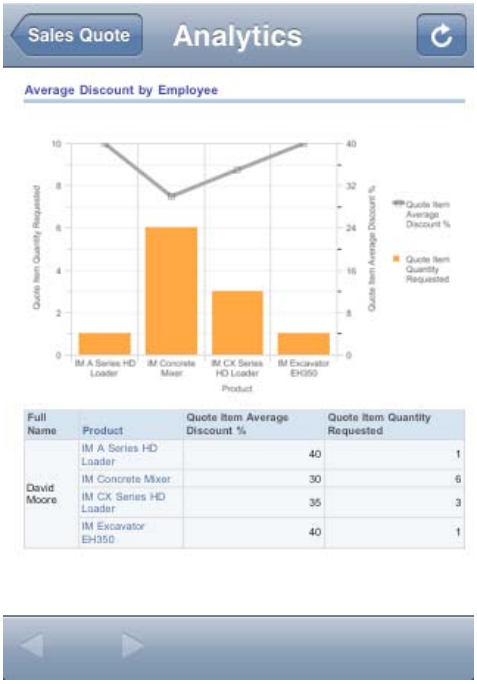


Analytics page – Average Discount by Employee report

## Header Variables for Context Passing

This table lists the header variables for the Sales Quotes worklist:

| Description | Variable |
|---|---|
| Name | Subject |
| From | FromUserName |
| Received | BeginDate |
| Due | DueDate |
| Quote # | QuoteNumber |
| Account | Account |
| Site | AccountSite |
| Status | Status |
| Total | QuoteTotal |

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| | |
|---|---|
| Currency | CurrencyCode |
| Opportunity | OpportunityName |
| Price List | PriceList |


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