

Oracle® Sales Intelligence

Implementation Guide

Release 11*i*

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Oracle Sales Intelligence Implementation Guide, Release 11i

Part No. B10991-01

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If you find any errors or have any other suggestions for improvement, please indicate the document title and part number, and the chapter, section, and page number (if available). You can send comments to us at:

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Preface

Intended Audience

Welcome to Release 11*i* of the Oracle Sales Intelligence Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- Oracle Sales Intelligence
- The Oracle Applications graphical user interface.

To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use Oracle Sales Intelligence.

- Chapter 1 provides an introduction to Oracle Sales Intelligence, and describes what is new and obsolete for this release.
- Chapter 2 describes the mandatory dependencies for Oracle Sales Intelligence.
- Chapter 3 describes implementation tasks for Oracle Sales Intelligence.
- Appendix A lists Oracle Sales describes Intelligence Base Summary Tables, High-Level Summary Tables and Dimensions.

- Appendix B describes the Concurrent Programs used by Oracle Sales Intelligence.

Documentation Accessibility

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Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle Sales Intelligence.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Sales Intelligence shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use Oracle Sales Intelligence.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them at <http://oraclestore.oracle.com>.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Sales Intelligence (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Sales Intelligence User Guide

This guide describes the Oracle Sales Intelligence reports, including descriptions of the report headings and graphs.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides

information to help you build your custom Oracle Forms Developer 6i forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Sales Intelligence. This manual details additional steps and setup considerations for implementing Oracle Sales Intelligence with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Sales Intelligence with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Sales Intelligence.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Oracle Workflow Developer's Guide

This guide explains how to define new workflow business processes and customize existing Oracle Applications-embedded workflow processes. It also describes how to define and customize business events and event subscriptions.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle Workflow API Reference

This guide describes the APIs provided for developers and administrators to access Oracle Workflow.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Sales Intelligence implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle Sales Intelligence and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Sales Intelligence working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle[®] server, and your hardware and software environment.

Oracle *MetaLink*

OracleMetaLink is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With *OracleMetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use *MetaLink*, register at (<http://metalink.oracle.com>).

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Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

*Oracle STRONGLY RECOMMENDS that you never use SQL*Plus[®], Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.*

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

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Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

Introduction

This chapter provides information on the following topics:

- [Section 1.1, "Oracle Sales Intelligence Overview"](#)
- [Section 1.2, "New in this Release"](#)
- [Section 1.3, "Obsolete in this Release"](#)

1.1 Oracle Sales Intelligence Overview

Oracle Sales Intelligence is an analytical application that integrates with the Oracle Sales Applications family. These transactional applications provide most of the data for summarization and analysis in Sales Intelligence.

Sales Intelligence can be used independently or in with Sales DBI. Using the extensive reporting and analytical capabilities of Sales Intelligence senior executives as well as sales and marketing managers can obtain comprehensive, real-time views of the sales cycle, assess current sales performance. They can then take any necessary action to meet sales quotas.

Sale professionals who are ultimately responsible for day-to-day product and opportunity management can use Sales Intelligence to target efforts and increase productivity. Sales Intelligence also shows trends in opportunities and product data. Sales Intelligence provides drill down into the organization hierarchy to allow identification of possible problem situations. In addition, users can view past and current performance to determine any gaps between sales quotas and actual performance.

Report access is controlled through user responsibility and Sales Group.

1.2 New in this Release

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.10 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

The following new features have been added to Oracle Sales Intelligence in this release.

- [Section 1.2.1, "New Reports for Opportunity Management and Product Management"](#)
- [Section 1.2.2, "Removal of Sales Interest Type Category and Territory Filtering in Previously-Released Sales Intelligence Reports"](#)
- [Section 1.2.3, "Previously-Released Sales Intelligence Reports that are Available in 11.5.10"](#)
- [Section 1.2.4, "Rewritten Reports"](#)
- [Section 1.2.5, "New Sales Group Security on Data Viewing"](#)
- [Section 1.2.6, "Consistent Counts and Amounts for Data Rollup"](#)
- [Section 1.2.7, "Product Hierarchy Included in 11.5.10 Sales Intelligence"](#)

1.2.1 New Reports for Opportunity Management and Product Management

There are nine new Sales Intelligence reports released with 11.5.10. These are:

Table 1–1 New Sales Intelligence Reports

Business Functional Area	Sales Intelligence Reports
Opportunity Management	Opportunity Summary
	Opportunity Analysis by Amount Bands
	Opportunity Analysis by Amount Bands (Trend)
	Opportunity Win/Loss Analysis
	Opportunity Win/Loss Analysis (Trend)
	Opportunity by Prospect or Customer (Trend)
	Opportunity Detail

Table 1–1 New Sales Intelligence Reports (Cont.)

Business Functional Area	Sales Intelligence Reports
Product Management	Top/Bottom Products
	Product Pipeline and Sales Growth (Trend)

1.2.2 Removal of Sales Interest Type Category and Territory Filtering in Previously-Released Sales Intelligence Reports

Some of the Sales Intelligence reports that were implemented in previous releases are still valid and in use. However, the sales interest type (primary code and secondary code) filtering for these reports has been removed as of release 11.5.10. This filtering includes:

- Product line
- Product family
- Product group

Also, Territory filtering has been removed for the previously-released reports. However, this release still use the Territory Assignment Interface Tables for customer, Quote and Order information.

1.2.3 Previously-Released Sales Intelligence Reports that are Available in 11.5.10

The previously-released reports that are still available to customers as of 11.5.10, and are listed after the new 11.5.10 reports in the application. See the *Oracle Sales Intelligence Implementation Guide*, 11.5.8 release, for details on implementing and maintaining the previously-released reports.

- Customer Activity Number of Leads Detail
- Customer Activity Number of Opportunities Detail
- Customer Activity Number of Orders Detail
- Customer Activity Number of Quotes Detail
- Customers at Risk Weighted Overall Rank
- Customers at Risk Customer Satisfaction Detail
- Customers at Risk Forecasted Revenue Detail
- Customers at Risk Sales Revenue Detail

- Customers at Risk Service Requests Detail
- Top/Bottom Customers Weighted Overall Rank
- Top/Bottom Customers Average Amount per Order Detail
- Top/Bottom Customers Forecasted Revenue Detail
- Top/Bottom Customers Low Return Rate Detail
- Top/Bottom Customers Sales Revenue Detail
- Average Revenue Per Order by Customer
- Average Revenue Per Order by Sale Channel
- Gross Margins by Customer
- Gross Margins by Period
- Gross Margins by Sales Channel
- Revenue Growth by Customer
- Revenue Growth by Sales Channel
- Top/Bottom Sales Channels Weighted Overall Rank
- Top/Bottom Sales Channels Customer Satisfaction Detail
- Top/Bottom Sales Channels Gross Margin Detail
- Top/Bottom Sales Channels Ratio of Leads to Order Detail
- Top/Bottom Sales Channels Sales Revenue Detail
- Top/Bottom Sales Channels Units Sold Detail
- Top/Bottom Sales Channels Win/Loss Ratio Detail
- Return on Compensation by Compensation Plan
- Return on Compensation by Role
- Return on Compensation by Salesperson
- Top/Bottom Performers Weighted by Overall Rank
- Top/Bottom Performers Close Ratio Detail
- Top/Bottom Performers Compensation Amount Detail
- Top/Bottom Performers Gross Margins Detail
- Top/Bottom Performers Revenue Credit Detail

- Top/Bottom Performers Sales Cycle Time Detail
- Top/Bottom Performers Sales Revenue Detail
- Top/Bottom Performers Units Sold Detail

1.2.4 Rewritten Reports

The Sales Intelligence reports have been extensively rewritten and reformatted. Their format now resembles that of Sales Intelligence DBI reports. The new reports have report-specific parameters, graphs of various types, and tables of data. They also include links to related reports.

Also, Oracle Sales Intelligence now uses the Performance Management Viewer (PMV) and Performance Management Framework (PMF) to define and render the new Sales Intelligence reports. These technologies are now prerequisites for Oracle Sales Intelligence. See the *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* for details on PMV and PMF.

1.2.5 New Sales Group Security on Data Viewing

Access to the Oracle Sales Intelligence reports is secured by the Sales Group hierarchy. The report parameters Sales Group and Period Type, From Period, and To Period secure data by time, sales group, product, and product category.

The hierarchical access by sales group enables executives to view sales reports down through their entire organization. Each subordinate has a view of data on their level and below, as the hierarchy is traversed downward.

Most reports use a hierarchical list of values in the Sales Group field, which shows the recursive nature of the sales group hierarchy, with an indication of the parent-child-peer relationships. For example, the hierarchy shown for a first-time login:

```
*Worldwide Sales
  -- US Sales
  -- EMEA Sales
  -- APAC Sales
  -- SA Sales
  -- Canada Sales
```

For example, for subsequent logins:

Parent group: *Worldwide Sales

Peer groups:

- - US Sales
- - EMEA Sales-
- - APAC Sales
- - SA Sales
- - Canada Sales

Self group: - - US Sales

Child groups:

- - - - Eastern States Sales
- - - - Midwest Sales
- - - - Pacific Coast Sales

The Opportunity Detail report (a live report) uses an expanded list of values to give you direct access to sales region data. For example:

- All
- APAC Sales
- Canada Sales
- EMEA Sales
- Industry Accounts
- Key Accounts
- Mid-Market Accounts
- SA Sales
- US Sales
- Worldwide Sales

1.2.6 Consistent Counts and Amounts for Data Rollup

The 11.5.10 Oracle Sales Intelligence reports use data rollup model to prevent the double counting of data. For example, if a sales opportunity is split between representatives in two sales groups. The sales opportunity will be counted as one opportunity for the higher-level manager, despite being split between the two sales groups in terms of revenue.

1.2.7 Product Hierarchy Included in 11.5.10 Sales Intelligence

For release 11.5.10, Oracle Sales Intelligence uses the new Product Hierarchy.

1.3 Obsolete in this Release

These reports have been discontinued (are not replaced by 11.5.10 Sales Intelligence reports):

- Average Revenue Per Order by Territory
- Revenue Growth by Territory
- Gross Margins by Territory
- Sales Cycle Length by Territory
- Win/Loss Analysis by Territory

Table 1–2, "Mapping 11.5.9 Reports to New 11.5.10 Reports" lists obsolete 11.5.9 reports and maps them to the new 11.5.10 reports that replace them.

Table 1–2 Mapping 11.5.9 Reports to New 11.5.10 Reports

Obsolete 11.5.9 Report Name	New 11.5.10 Report Name
Opportunity Detail	Opportunity Detail
Pipeline Detail	Opportunity Detail
Pipeline Salesperson Summary by Sales Channel	Opportunity Summary
Pipeline Salesperson Summary by Sales Stage	Opportunity Summary
Pipeline Salesperson Summary by Sales Status	Opportunity Summary
Pipeline Summary by Sales Channel	Opportunity Summary
Pipeline Summary by Sales Stage	Opportunity Summary
Pipeline Summary by Sales Status	Opportunity Summary
Risky Opportunities Weighted Overall Rank	Opportunity Summary
Risky Opportunities Customer Satisfaction Overall	Opportunity Summary
Valuable Opportunities Weighted Overall Rank	Opportunity Summary
Valuable Opportunities Opportunity Amount Detail	Opportunity Summary
Valuable Opportunities Sales Revenue Detail	Opportunity Summary
Valuable Opportunities Win Probability Detail	Opportunity Summary
Top/Bottom Selling Product Families Weighted by Overall Rank	Top/Bottom Products

Table 1–2 Mapping 11.5.9 Reports to New 11.5.10 Reports (Cont.)

Obsolete 11.5.9 Report Name	New 11.5.10 Report Name
Top/Bottom Selling Product Families Close Ratio Detail	Top/Bottom Products
Top/Bottom Selling Product Family Forecasted Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Families Gross Margin Detail	Top/Bottom Products
Top/Bottom Selling Product Families Sales Cycle Time Detail	Top/Bottom Products
Top/Bottom Selling Product Families Sales Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Families Units Sold Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Weighted Overall Rank	Top/Bottom Products
Top/Bottom Selling Product Groups Close Ratio Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Forecasted Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Gross Margin Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Sales Cycle Time Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Sales Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Groups Units Sold Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Weighted Overall Rank	Top/Bottom Products
Top/Bottom Selling Product Lines Close Ratio Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Forecasted Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Gross Margin Detail	Top/Bottom Products

Table 1–2 Mapping 11.5.9 Reports to New 11.5.10 Reports (Cont.)

Obsolete 11.5.9 Report Name	New11.5.10 Report Name
Top/Bottom Selling Product Lines Sales Cycle Time Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Sales Revenue Detail	Top/Bottom Products
Top/Bottom Selling Product Lines Units Sold Detail	Top/Bottom Products
Average Revenue Per Order by Period	Product Pipeline and Sales Growth (Trend)
Average Revenue Per Order by Product Family	Top/Bottom Products
Average Revenue Per Order by Product Group	Top/Bottom Products
Average Revenue Per Order by Product Line	Top/Bottom Products
Gross Margins by Product Family	Top/Bottom Products
Gross Margins by Product Group	Top/Bottom Products
Gross Margins by Product Line	Top/Bottom Products
Revenue Growth by Product Family	Product Pipeline and Sales Growth (Trend)
Revenue Growth by Product Group	Product Pipeline and Sales Growth (Trend)
Revenue Growth by Product Line	Product Pipeline and Sales Growth (Trend)
Sales Cycle Length by Product Family	Top/Bottom Products
Sales Cycle Length by Product Group	Top/Bottom Products
Sales Cycle Length by Product Line	Top/Bottom Products
Sales Cycle Length by Sales Channel	Opportunity Win/Loss Analysis
Sales Cycle Length by Salesperson	Opportunity Win/Loss Analysis
Win/Loss Analysis by Product Family	Opportunity Summary
Win/Loss Analysis by Product Group	Opportunity Summary
Win/Loss Analysis by Product Line	Opportunity Summary
Win/Loss Analysis by Salesperson	Opportunity Summary

Verify Mandatory Dependencies

This chapter provides an overview of what you need to have installed, implemented, and verified before implementing Oracle Sales Intelligence. Topics include:

- [Section 2.1, "Sales Intelligence Mandatory Dependencies"](#)
- [Section 2.2, "E-Business Suite Product Integrations"](#)
- [Section 2.3, "Sales Intelligence Optional Integrations"](#)

Additional documents related to the modules discussed in this guide are referred to in the preface.

2.1 Sales Intelligence Mandatory Dependencies

Before you implement Sales Intelligence, ensure that your system meets the following prerequisites.

2.1.1 Hardware and Software

All hardware and software prerequisites are detailed in [About Oracle Sales Intelligence](#), available on Oracle MetaLink. Ensure that you use the appropriate version for your release.

2.1.2 Sales Intelligence Implementation Steps

The Sales Intelligence implementation steps detailed in [Chapter 3, "Implementation Tasks for Oracle Sales Intelligence"](#) are mandatory. These implementation steps enable the parameters in the Sales Intelligence reports. The reports will not run properly if the implementation steps are not completed, and might have missing data or not run at all.

2.1.3 Set Up Oracle Applications Data

Ensure that your Oracle Applications data meets the appropriate prerequisites for the reports you want to implement. Refer to the About Oracle Sales Intelligence for information about prerequisite patches available on Oracle MetaLink. Ensure that you use the appropriate version for your release. Also, ensure that Oracle Sale Online or Oracle Telesales (version 11.5.10) is installed with the sales group and sales stage parameters implemented.

2.1.4 Set Up Oracle Applications Security

Before you implement Sales Intelligence, ensure that your Oracle Applications security is set up for your implementation.

Data is secured in Sales Intelligence using standard group and function security in Oracle Applications. For information on how to set up Oracle Applications security, see "Managing Oracle Applications Security" in the *Oracle Applications System Administrator's Guide*.

The Resource Group Security (Sales Group) model is used by Sales Intelligence in addition to standard Oracle Applications security. Sales group data is based on the resource group, which is a type of organization.

2.2 E-Business Suite Product Integrations

Oracle Sales Intelligence integrates with these applications:

- Oracle Field Sales/TeleSales
- Oracle Order Management
- Oracle Bill of Materials
- Oracle Financials
- Oracle CRM Foundation
- Oracle Product Intelligence
- Oracle Financials Intelligence

2.2.1 Data Sources for Performance Measures in Sale Intelligence

Table 2–1, "Data Sources" lists the high-level data sources for Sales Intelligence Performance Measures:

Table 2–1 Data Sources

Application	Performance Measure
Oracle Field Sales/TeleSales	Total Opportunity (by status), Pipeline, Win/Loss, Average Sales Cycle
Oracle Bill of Materials	Gross Margin%
Oracle Order Management	Units Sold
Oracle Financials	Sales (revenue for a specific product for a certain time period)

2.2.2 Report Parameters in Sale Intelligence

Table 2–2, "Report Parameters" lists the high-level data sources for Sales Intelligence Performance Measures:

Table 2–2 Report Parameters

Application	Report Parameters
Oracle Field Sales/TeleSales	Sales Channel, Sales Stage, Opportunity Status, Competitor, Credit Type, Win Probability
Oracle Financials	Enterprise Time, Currency
Oracle Product Intelligence	Product Category, Product
Oracle CRM Foundation	Sales Group
Oracle Customer Online (TCA)	Customer Category

2.3 Sales Intelligence Optional Integrations

Some performance measures are optional for Oracle Sales Intelligence. If these are not implemented, some of the values in the Sales Intelligence reports will display as N/A. For example, if the Financials measure is not implemented, the Sales measure on the Top/Bottom Product report will display as N/A. Other optional performance measures for Sales Intelligence are:

- Sales

- Units Sold
- Gross Margin%

Implementation Tasks for Oracle Sales Intelligence

Perform the following tasks to implement Oracle Sales Intelligence:

- [Section 3.1, "Implementation Task Sequence Overview"](#)
- [Section 3.2, "Implementing Report Parameters"](#)
- [Section 3.3, "Update Sales Group Hierarchy \(Sales Group Dimension\)"](#)
- [Section 3.4, "Update the Product/Product Category Hierarchy"](#)
- [Section 3.5, "Set Up Sales Intelligence Profile Options"](#)
- [Section 3.6, "Implementing Performance Management Viewer/Performance Management Framework"](#)
- [Section 3.7, "Defining Calendar Periods"](#)
- [Section 3.8, "Running the Initial Load for Opportunity Management and Product Management Reports"](#)
- [Section 3.9, "Setting Up Security"](#)
- [Section 3.10, "Modifying Sales Intelligence Menus"](#)

3.1 Implementation Task Sequence Overview

[Table 3–1, "Sales Intelligence Implementation Process Steps"](#), lists the order and process of implementing Oracle Sales Intelligence, and gives a brief description of each step. Refer to the subsections in this chapter for details on the tasks.

Table 3–1 Sales Intelligence Implementation Process Steps

Steps	Description	Forms or HTML	Responsibility
1. Performing Prerequisites	Ensure that the prerequisite hardware and software components exist for successful Sales Intelligence reporting. See Chapter 2, "Verify Mandatory Dependencies" for details.	Various	Various
2. Implementing Report Parameters	Implementation of report parameters in OSO and other applications. See Section 3.2, "Implementing Report Parameters" for details.	HTML	Sales Online Superuser
3. Setting Up Sales Group Hierarchy/Sales Representatives	Define a hierarchy of resource groups (sales groups) in CRM Resource Manager. See Section 3.3, "Update Sales Group Hierarchy (Sales Group Dimension)" for details.	Forms	CRM Resource Manager
4. Implementing Product/Product Category Reporting	Implement Product/Product Category Reporting, which is required for Sales Intelligence information on purchasing and supply chain. See Section 3.4, "Update the Product/Product Category Hierarchy" for details.	HTML	Catalog Manager
5. Setting Up Sales Intelligence Profiles	Define the profiles needed by Sales Intelligence to perform data collection for reporting. See Section 3.5, "Set Up Sales Intelligence Profile Options" for details.	Forms	System Administrator
6. Implementing PMV/PMF	The Performance Management Viewer (PMV) enables the views of data in reports. See Section 3.6, "Implementing Performance Management Viewer/Performance Management Framework" for details.	HTML	BIS Administrator
7. Setting up the Calendar Periods	Define the calendar periods to be used in Sales Intelligence. See Section 3.7, "Defining Calendar Periods" for details.	Forms	Sales Intelligence Collection Manager

Table 3–1 Sales Intelligence Implementation Process Steps (Cont.)

Steps	Description	Forms or HTML	Responsibility
8. Performing Initial Data Load	Load the Opportunity and Product data for Sales Intelligence. See Section 3.8, "Running the Initial Load for Opportunity Management and Product Management Reports" for details.	Forms	Sales Intelligence Collection Manager
9. Setting Up Sales Intelligence Security	Define the security level to control access to Sales Intelligence reports. See Section 3.9, "Setting Up Security" for details.	Forms	Sales Intelligence Collection Manager
10. Modifying Sales Intelligence Menus	Change the links to reports on the Sales Intelligence menus. See Section 3.10, "Modifying Sales Intelligence Menus" for details	Forms	System Administrator - for implementation tasks Sales Intelligence - to access reports

3.2 Implementing Report Parameters

In order to properly populate the various list of values for the report parameters, you must perform implementation tasks in Oracle Field Sales and other applications, as well as run some concurrent programs. The tasks are listed with references to related documentation for each task.

- **Set up Calendar:** See the *Oracle Field Sales Implementation Guide*. Also, run the Update Time Dimension concurrent program, which must be run prior to the initial data load programs.
- **Set up Sales Channel:** See the *Oracle Field Sales Implementation Guide*.
- **Define Sales Stages:** See the *Oracle Field Sales Implementation Guide*.
- **Set up Users, Security and Reporting:** See the *Oracle Field Sales Implementation Guide*, and the *Oracle Common Application Component Implementation Guide*. Also, see [Update Sales Group Hierarchy \(Sales Group Dimension\)](#).
- **Set up Product/Product Category:** See the *Oracle Field Sales Implementation Guide* and the Product Lifecycle Management documentation on the Common Product Catalog. Also, see [Update the Product/Product Category Hierarchy](#).
- **Set up Currency:** See the *Oracle Field Sales Implementation Guide*.
- **Set up Opportunity Status:** See the *Oracle Field Sales Implementation Guide*.
- **Add Competitors to Marketing:** See the *Oracle Field Sales Implementation Guide*.

- **Set up Customer Category:** See the *Oracle Field Sales Implementation Guide*.
- **Define Sales Credit:** See the *Oracle Field Sales Implementation Guide*.
- **Create Win Probabilities:** See the *Oracle Field Sales Implementation Guide*.

3.3 Update Sales Group Hierarchy (Sales Group Dimension)

The Sales Group Hierarchy is used to determine the organization of the user's sales force in hierarchical sales groups. Sales Group is also used to control data access and ensure security.

When there is change in Sales Group Hierarchy, you must run the Load Sales Group Hierarchy Data request set to get the latest Sales Group Hierarchy for correct data rollup and results.

See [Appendix B, "Concurrent Programs"](#) for details on the concurrent programs.

Concurrent Programs to Run Separately

Run these two programs only for the initial data load, or if necessary when applying a patch (as stated in the patch Readme file). Also, run these programs if the data in JTF_RS_GROUPS_DENORM or JTF_RS_REP_MANAGERS becomes corrupted.

- Flatten Group Hierarchy
- Build Reporting Manager

Concurrent Programs in the Load Sales Group Hierarchy Data Request Set

Run this request set for the initial data load, and for any incremental data loads. Programs in this request set:

- Maintain Current Groups and Roles
- Populate Resource Group
- Update Primary Groups for Salespersons
- Load Sales Intelligence Sales Group Tables (owned by Sales Intelligence)

Login

Oracle Forms

Responsibility

Sales Intelligence Collection Manager or Oracle CRM Administrator (for the two programs that run separately)

For a detailed description of the procedures, see the *Oracle Applications System Administrator's Guide*.

References

- *11i Applications Technology Group (ATG) Common Applications Components* documentation
- Oracle Applications System Administrator's Guide

If, after implementing Sales Intelligence, you change the Sales Group hierarchy, you will have to run these concurrent programs to reload the correct data:

- Load Sales Group Hierarchy Data request set
- Load Opportunity Reports Summary Data
- Load Product Reports Summary Data

3.4 Update the Product/Product Category Hierarchy

You must have the Product and Product Category (Common Product Category) implemented in order to use Sales Intelligence. To implement Product and Product Category for Sales Intelligence, you must set up your product catalog in Oracle Product Lifecycle Management (see the *Oracle Product Lifecycle Management* documentation) and then run the DBI Item Dimension Setup Request Set. Also, see the *Oracle TeleSales Implementation Guide* for details on setting up the Product Catalog for new installations, or upgrading the Product Catalog.

Note: All Sales products now use the Common Product Catalog in Oracle Product Lifecycle Management to keep track of the product hierarchy.

This program loads the item assignments and populates the item dimension star table. This program should be run once during initial load. Once the item dimension is populated, any updates that you make to the dimension (for example, adding items or changing the hierarchy) are automatically uploaded when you publish your item hierarchy changes in Oracle Advanced Product Catalog.

To run the DBI Item Dimension Setup Request Set:

Concurrent Programs in the DBI Item Dimension Setup Request Set

- Load Catalog Hierarchy
- Load Item Dimension Hierarchy

Both of these programs are owned by Oracle Product Development Intelligence.

Login

Oracle Forms

Responsibility

Sales Intelligence Collection Manager or Oracle Sales Administrator

For a detailed description of the procedures, see the *Oracle Applications System Administrator's Guide*.

References

- *Oracle TeleSales Implementation Guide* (for Product Category setup and upgrade)
- *11i Applications Technology Group (ATG) Common Applications Components* documentation
- *Oracle Product Lifecycle Management Implementation Guide*

If, after implementing Sales Intelligence, you change the Product/Product Catalog hierarchy, you will have to run these concurrent programs in initial load mode to reload the correct data:

- Load Opportunity Reports Summary Data
- Load Product Reports Summary Data

3.5 Set Up Sales Intelligence Profile Options

These profile options define the default values for the currency amounts represented in the Oracle Sales Intelligence reports, the time periods and General Ledger calendar used, data display if there is no data to report, and the master organization used for product and item reporting.

You can change these profile options after implementation is complete; however, if you change the parameters after data is loaded into Sales Intelligence, you will have to perform another initial load.

See the *Oracle Applications System Administrator's Guide* for details on setting profile values.

Login

Oracle Forms

Responsibility

System Administrator

Navigation

Profile > System > Find System Profile Values

Steps

1. In the Profile field, search for the Sales Intelligence profiles. Click **Find**.
2. Define the parameters listed in [Table 3-2, "Sales Intelligence Profile Options"](#) as necessary.

3. Save your work.

Table 3–2 Sales Intelligence Profile Options

Profile Option Name	Application Owner	Default Value	Description
BIS: Global Start Date (mm/dd/yyyy)	BIS	N/A	<p>Sets the absolute start date for Sales Intelligence data. All data loaded into the Sales Intelligence summary tables is collected as of this date. Historical data is maintained in Sales Intelligence from this date forward.</p> <p>Initially, the From Period parameter (this parameter is read from the Update Time Dimension concurrent program) defaults to the value entered for BIS: Global Start Date. For subsequent incremental updates, it will start populating data after the To Period of the last run. (The To Period parameter defaults to the period defined in the Enterprise Calendar).</p>
BIS: Enterprise Calendar	BIS	N/A	<p>Sets which General Ledger calendar is used for Sales Intelligence reporting. Set this profile to the same value as the OS: Forecast Calendar profile.</p> <p>Note: If, after implementing Sales Intelligence, you change the value of this profile, you will have to run these concurrent programs to reload the correct data:</p> <ul style="list-style-type: none"> ▪ Update Time Dimension ▪ Load Opportunity Reports Summary Data ▪ Load Product Reports Summary Data
BIS: Start Day of Week	BIS	N/A	Sets the starting day for a week (for example, Sunday or Monday).

Table 3–2 Sales Intelligence Profile Options (Cont.)

Profile Option Name	Application Owner	Default Value	Description
BIS: Period Type	BIS	N/A	<p>Sets the default period type. Valid values are Month, Quarter, and Year (one of the period types supported by the General Ledger Calendar, set by the OS: Forecast Calendar profile. This value is used to determine the base time period for the data collection performed by the concurrent programs. It also sets the default value for the Period Type report parameter.</p> <p>If the user selects All for the Period. From Period or To Period report parameters, the value for those parameters defaults to the value set in BIS: Period Type.</p>
CRM BIS: Currency Code	CRM BIS	US Dollar	Sets the currency code to use as the primary currency for converting multi-currency transactional data. Data is stored in the Sales Intelligence summary tables using the currency value set in this profile.
CRM BIS: GL Conversion Type	CRM BIS	Corporate	Sets the rate conversion type used to convert multi-currency transactional data stored with one primary currency in the summary tables. This profile is used in conjunction with CRM BIS: Currency_Code.
OE: Item Validation Organization	Oracle Order Entry	(Depends on the organizations loaded)	Determines the Master Organization used in Product/Item reporting. If this profile is set at a level other than site, then it must be set at the same level in Field Sales and/or Telesales as well.

3.6 Implementing Performance Management Viewer/Performance Management Framework

The Performance Management Viewer (PMV) and Performance Management Framework (PMF) enables render and display data in the Sales Intelligence report.

The Sales Intelligence reports use the Performance Management Viewer (PMV) to render the reports. See the *Oracle E-Business Intelligence Daily Business Intelligence User Guide* for details.

The Basic user type denotes a standard report user. A Basic user has these personalization options:

- Exporting report data to Microsoft Excel or PDF formats
- Scheduling reports
- Customizing report links
- Saving report parameter values as defaults (these saved values override the shipped default values in the Sales Intelligence reports)

Login

Oracle Applications

Responsibility

System Administrator

Navigation

System Administrator > Profiles > System

Steps

1. Navigate to the System Profile window.
2. Query the user and in the Profile field, select the "PMV: User Type" profile option.
3. Select the Basic PMV user type to assign to the user.
4. Repeat this process for each user you want to access PMV reporting functionality.
5. Save your work.

3.7 Defining Calendar Periods

Run the Update Time Dimension concurrent program to setup the initial time dimension that will be used during data rollup. This program must be run before the initial load of data discussed in [Section 3.8, "Running the Initial Load for Opportunity Management and Product Management Reports"](#).

If there is a change in the GL Calendar Periods, or Period Types, or the GL Calendar itself is exchanged for another GL Calendar, the Update Time Dimension concurrent program must be re-run.

The Update Time Dimension concurrent program automatically determines if time-related Sales Intelligence tables have been populated. If they have, then the Update Time Dimension concurrent program runs in incremental mode.

Concurrent Programs

- Update Time Dimension

This program is owned by Financial Intelligence.

Login

Oracle Forms

Responsibility

Sales Intelligence Collection Manager

For a detailed description of the procedures, see the *Oracle Applications System Administrator's Guide*.

3.8 Running the Initial Load for Opportunity Management and Product Management Reports

Run the initial load concurrent programs to load data into the summary tables and views for the reports.

Concurrent Programs

- Load Opportunity Reports Summary Data Request Set
- Load Product Reports Summary Data

These programs are owned by Sales Intelligence.

Login

Oracle Forms

Responsibility

Sales Intelligence Collection Manager

For a detailed description of the procedures, see the *Oracle Applications System Administrator's Guide*.

References

- *Oracle Applications System Administrator's Guide*

Many of the previously-released Sales Intelligence reports are available. See [Previously-Released Sales Intelligence Reports that are Available in 11.5.10](#) for a list of the available previously-released Sales Intelligence reports. See the Oracle Sales Intelligence Implementation Guide, 11.5.8 release, for information on implementing and maintaining these reports.

3.8.1 Run Incremental Refresh for the Opportunity Management Reports

To perform an incremental refresh of the data load for the Opportunity Management reports, run the Load Opportunity Reports Summary Data concurrent program in the Incremental (I) mode. There is no incremental refresh for the Product Management reports.

3.9 Setting Up Security

Data is secured in Sales Intelligence using standard group and function security in Oracle Applications. For information on how to set up Oracle Applications security, see "Managing Oracle Applications Security" in the *Oracle Applications System Administrator's Guide*.

The Resource Group Security (Sales Group) model is used by Sales Intelligence in addition to standard Oracle Applications security. Sales group data is based on the resource group.

Sales Intelligence uses responsibilities to regulate user access to content and functionality. A responsibility is a level of authority in Oracle Applications that allows you access the functions and data that are appropriate to your role in an organization. The data displayed in the Sales Group the 11.5.10 Sales Intelligence reports is segmented according to the user's role.

A responsibility can provide access to:

- A specific report or set of reports.
- A menu that provides navigation to the commands or actions that the responsibility can perform.

Note: The security model for the 11.5.10 Sales Intelligence reports can affect the data that a user sees in the report totals. For example, If a user manages sales in Western Canada and part of Central America, but does not have the sales group authority to see the ultimate totals for all of Canada and Central American combined, the user will not see the combined rollup totals for all of their regions.

To gain access to a report, the system administrator must assign the appropriate responsibility to the report user, just as they would assign a responsibility to an Oracle Applications user. Sales Intelligence uses the following responsibilities:

- **Sales Intelligence:** Allows users to run Sales Intelligence reports
- **Sales Intelligence Collection Manager:** Enables system administrators to run concurrent programs, request sets for the initial load of data and the subsequent refreshing of data.

3.10 Modifying Sales Intelligence Menus

If you want to remove the links to reports that appear in Sales Intelligence menus, do the following:

Login

Oracle Applications

Responsibility

Sales Intelligence Collection Manager

Navigation

System Administrator > Security > Responsibility > Define

Steps

1. Query for the Sales Intelligence responsibility that is associated with the menu that you want to modify.
2. In the Menu Exclusions tabbed region, in the Type column choose Function and in the Name field choose value from a list of form functions (the links to reports in the menu) appears.
3. Select the form function that you want to exclude from the menu.
4. Repeat on a separate row for each form function that you want to exclude.

Note: These steps allow you to remove links from the application window that initially lists the Sales Intelligence reports. However, the reports you remove may still be listed as links in other Sale Intelligence reports. Users attempting to use these links to access the reports you have removed will not be able to access them.

Summary Tables and Dimensions in Oracle Sales Intelligence Reports

This appendix describes the high-level and base summary tables and dimensions used in the Oracle Sales Intelligence Reports.

The summarized information in Sales Intelligence reports, is built on base summary tables and high-level summary tables.

A base summary table is a database table which stores aggregated data derived from OLTP transactions.

A high-level summary table is a database object that contains the results of a query. This object is completely maintained by the Oracle database. It enables users to manage aggregated data more efficiently. High-level summary tables are for internal Oracle use only and can change without notice.

A.1 High-Level Summary Tables in Sales Intelligence Reports

Table A-1, "Sales Intelligence Summary Tables" describes the high-level summary table used for each Sales Intelligence report.

Table A-1 Sales Intelligence Summary Tables

High Level Summary Table	Description
Opportunity Management Reports	
BIL_SI_OPTY_SG_AMOUNT	Data from fact table (BIL_SI_OPTY_FACT) are rolled up on Sales Group hierarchy in this table and the amounts are calculated.
BIL_SI_OPTY_SG	Data from fact table (BIL_SI_OPTY_FACT) are rolled up on Sales Group hierarchy in this table and the amounts are calculated. The main difference between this table and BIL_SI_OPTY_SG_AMOUNT is that this table does not carry Product related column information. This table is required to keep the count information correct, when the report does not have any Product related information as a filter.
BIL_SI_OPTY_PROD_AMOUNT	BIL_SI_OPTY_PROD_AMOUNT is the summary table that collects data from BIL_SI_OPTY_SG_AMOUNT and rolled up by Product Category hierarchy. In this table only the amounts are calculated. Counts are calculated in a later step.
BIL_SI_OPTY_COUNT	Both count of opportunities and amounts are calculated after rolling up on Sales Group and Product Category hierarchies.
BIL_SI_OPTY_COUNT_NP	Both count of opportunities and amounts are calculated after rolling up on Sales Group hierarchy, without any Product related information.
BIL_SI_OPTY_TIME	This table stores opportunity data after slicing and summarizing by time period types. Current release of Sales Intelligence supports three period types - Year, Quarter and Month. This is the final table that the report run-time queries to get the results. Only exception for this is 'Opportunity Acquisition by Customer or Prospect (Trend) report, which goes against BIL_SI_OPTY_PROCUST, which is built on top of this table.
BIL_SI_OPTY_TIME_NP	This table stores the same data as above, except for that this table does not contain Product related column information. This table is required to keep the count information correct, when the report does not have any Product related information as a filter.
BIL_SI_OPTY_PROCUST	This table stores the data required for Opportunity Acquisition by Customer or prospect (Trend) report. This report shows the opportunity amount, opportunity count divided between prospect and customer along with prospect and customer counts, for a particular period of time, which is depended on the period type selected. This table hence stores this information grouped by Time, Sales Group and Product dimension along with other opportunity filters required by the report.

Table A-1 Sales Intelligence Summary Tables (Cont.)

High Level Summary Table	Description
BIL_SI_OPTY_PROCUST_NP	This table stores the same data as above, except for that this table does not contain Product related column information. This table is required to keep the count information correct, when the report does not have any Product related information as a filter.
Product Management Reports	
BIL_SI_PRD_TM	This is the first stage of data summarization and rollup for Product Management Reports. Fact table data are summarized based on the time dimension levels (BIL_SI_TIME_PERIODS) - Month, Quarter and Year. (Refer to Update Time Dimension concurrent program description for details on populating BIL_SI_TIME_PERIODS table.)
BIL_SI_PRD_SG	This is the second stage of data rollup for Product Management reports. Sales group denormalized table. BIL_SI_RS_GRP is used as the Sales Group dimension level rollup. (Refer to the description of the Load Sales Intelligence Sales Group Tables concurrent program for details on populating BIL_SI_RS_GRP.)
BIL_SI_PRD_PD	Final stage of data rollup for Product Management reports. At this stage of processing, the data from BIL_SI_PRD_SG are rolled up along product category hierarchy (ENI_DENORM_HIERARCHIES) to support reporting by product category/product filters and view bys.

A.2 Base Summary Tables

Table A-2, "Sales Intelligence Base Summary Tables" describes the Base Summary Tables used for each Oracle Sales Intelligence report.

Table A-2 Sales Intelligence Base Summary Tables

Reports	Base Summary Table	Description
Opportunity Management Reports	BIL_SI_OPTY_FACT	The fact table collects opportunity data from AS_SALES_CREDITS_DENORM. This table provides all the required columns for subsequent data rollup and summarization that ultimately support Opportunity Management reports. Join to the eni_oltp_item_star is performed during the data processing to update item/product defined on opportunity lines with the current product category. Opportunities with close date (decision_date) falls within the period range available in the time table are collected.
Product Management Reports	BIL_SI_PRD_FACT	This fact table stores the data from as_sales_credits_denom, cst_bis_margin_summary and eni_oltp_item_star tables. In addition, All the needed calculations are performed at this stage. Similar to the Opportunity Fact processing, the join to eni_oltp_item_star table is done to update sales data with current product category for subsequent data rollup along the product category hierarchy. Also, the collection of the opportunity/sales data are limited by the date ranges in the time table.

A.3 Dimensions in Sales Intelligence Reports

Table A-3, "Sales Intelligence Dimensions" describes the dimensions in the Sales Intelligence reports, from the parameter displayed in the report to the tables used to support that dimension.

Table A-3 Sales Intelligence Dimensions

Display Name (Parameter Name)	Dimension + Dimension Level	Level View	Referenced Tables in the View
Period Type, From Period, To Period, Period (single Period on Trend reports)	TIME+FII_TIME_ENT_ PERIOD (Month) TIME+FII_TIME_ENT_ QTR (Quarter) TIME+FII_TIME_ENT_ YEAR (Year)	FII_TIME_ENT_PERIOD_V FII_TIME_ENT_QTR_V FII_TIME_ENT_YEAR_V	FII_TIME_ENT_ PERIOD FII_TIME_ENT_QTR FII_TIME_ENT_YEAR
Sales Channel	CHNL+SI_SALES_CHNL	BIL_DIM_LVL_SLS_ CHANNELS_V	ASO_I_SALES_ CHANNELS_V
Sales Stage	STAGE+SI_SALES_STAGE	BIL_DIM_LVL_SALES_STAGES_ V	AS_SALES_STAGES_ ALL_B AS_SALES_STAGES_ ALL_TL
Sales Group	ORGANIZAION+JTF_ ORG_SALES_GROUP	JTF_RS_DBI_RES_GRP_VL	jtf_rs_dbi_denorm_res_ groups jtf_rs_groups_tl jtf_rs_group_usages
Product Category	ITEM+ENI_ITEM_VBH_ CAT	ENI_ITEM_VBH_CAT_V	FND_LOOKUP_ VALUES MTL_CATEGORIES_V MTL_DEFAULT_ CATEGORY_SETS mtl_category_set_valid_ cats eni_denorm_hierarchies
Currency	CURRENCY+FII_ CURRENCIES	FII_CURRENCIES_V	FND_CURRENCIES_VL
Opportunity Status	STATUS+SI_OPTY_ STATUS	BIL_SI_OPTY_STATUS_V	FND_LOOKUP_ VALUES

Table A-3 Sales Intelligence Dimensions (Cont.)

Display Name (Parameter Name)	Dimension + Dimension Level	Level View	Referenced Tables in the View
Competitor	COMPETITOR+SM_ COMPETITOR	BIL_DIM_LVL_COMPETITOR_V	ams_competitor_ products_b hz_parties FND_LOOKUP_ VALUES
Close Reason	CLOSEREASON+BI_SLS_ CLOSE_REASON	BIL_DIM_LVL_CLS_REASON_V	AS_LOOKUPS
Customer Category	CUST_CATEGORY+SI_ SLS_CUST_CATEGORY	BIL_DIM_LVL_CST_ CATEGORY_V	AR_LOOKUPS
Sales Group (used in the Opportunity Detail report)	SG+SALES_GROUP	BIL_SI_SG_LOV_V	jtf_rs_groups_vl jtf_rs_groups_denorm jtf_rs_group_usages
Opportunity Status (used in the Opportunity Detail report)	STATUS+SI_OPTY_ STATUS	BIL_SI_OPTY_STATUSES_V	AS_STATUSES_B AS_STATUSES_TL
Credit Type	CREDIT+CREDIT_TYPE	BIL_DIM_LVL_CRDT_TYPE_V	aso_i_sales_credit_ types_v
Win Probability	WINPROB+SI_WIN_PROB	BIL_DIM_LVL_WIN_ PROBABILITY_V	AS_FORECAST_PROB_ ALL_B AS_FORECAST_PROB_ ALL_TL
Product	ITEM+ENI_ITEM	ENI_ITEM_V	FND_LOOKUP_ VALUES ENI_OLTP_ITEM_STAR MTL_SYSTEM_ITEMS_ TL MTL_CATEGORIES_TL
Report By	SI_PARAM1+PARAM1	BIL_SI_PRD_RPTBY_V	FND_LOOKUP_ VALUES
View	SI_PARAM2+PARAM2	BIL_SI_TOP_BTM_V	FND_LOOKUP_ VALUES
Rows	SI_PARAM3+PARAM3	BIL_SI_DISPLAY_ROW_V	FND_LOOKUP_ VALUES

Concurrent Programs

This appendix describes the concurrent programs used by Oracle Sales Intelligence.

Note: When there is change in Sales Group Hierarchy, you must run the Load Sales Group Hierarchy Data request set to get the latest Sales Group Hierarchy for correct data rollup and results. See [Section 3.3, "Update Sales Group Hierarchy \(Sales Group Dimension\)"](#) for details.

B.1 Sales Intelligence Concurrent Programs

Table B–1, "Sales Intelligence Concurrent Programs" describes the concurrent programs used by the Oracle Sales Intelligence.

Table B–1 Sales Intelligence Concurrent Programs

Mandatory	Owner	Concurrent Program Name	Description
Yes	JTF/Resource Manager	Flatten Group Hierarchy	This program denormalizes the Resource Group hierarchy structure into a flat structure for improved data access. See the <i>Oracle Common Application Components Implementation Guide</i> for details.
Yes	JTF/Resource Manager	Build Reporting Manager	This program rebuilds the JTF_RS_REP_MANAGERS table with correct data from groups Denorm populated by the Flatten Group Hierarchy concurrent program. See the <i>Oracle Common Application Components Implementation Guide</i> for details.
Yes	JTF/Resource Manager	Maintain Current Groups and Roles	This program identifies active records in JTF_RS_GROUPS_DENORM and TF_RS_ROLE_RELATIONS. It is the ACTIVE_FLAG to the tables JTF_RS_GROUPS_DENORM and JTF_RS_ROLE_RELATIONS. This column will contain the values 'Y' for active records and 'NULL' for inactive records. This concurrent program is part of the Load Sales Group Hierarchy Data Request Set.
Yes	JTF/Resource Manager	Populate Resource Group	This program populates the Sales Group Hierarchy Dimension data required by the view JTF_RS_DBI_RES_GRP_VL. It will repopulate data in JTF_RS_DBI_MGR_GROUPS and JTF_RS_DBI_DENORM_RES_GROUPS tables. The view mentioned above is based on these tables. This concurrent program is part of the Load Sales Group Hierarchy Data Request Set.

Table B-1 Sales Intelligence Concurrent Programs (Cont.)

Mandatory	Owner	Concurrent Program Name	Description
Yes	JTF/Resource Manager	Update Primary Groups for Salespersons	<p>This program eliminates the multiple groups/ rows for a salesrep for a given date. This ensures that sales representative data is consistently rolled up along one sales group hierarchy for any sales representative (defined in JTF_RS_SALESREPS table) and for any given date. When a record is queried from the table JTF_RS_SRP_GROUPS, it will return only one primary group. The date range from which the primary groups will be selected is from 01-JAN-1900 to 31-DEC-4712. If no primary group is found, the 'Unassigned' Group (group id = -1) will be allocated as the primary group. This concurrent program is part of the Load Sales Group Hierarchy Data Request Set.</p>
Yes	Sales Intelligence	Load Sales Intelligence Sales Group Tables	<p>This program performs the refresh of the BIL_SI_GRP_CNT and BIL_SI_RS_GRP tables. Each time this program is executed, these two tables are refreshed in the order mentioned. BIL_SI_RS_GRP contains the current active sales groups, parent sales group, and group members in the Sales Group hierarchy. BIL_SI_GRP_CNT is a supporting table that populates BIL_SI_RS_GRP.</p> <p>This concurrent program does not require any user parameters.</p> <p>This concurrent program is part of the Load Sales Group Hierarchy Data Request Set.</p>

Table B-1 Sales Intelligence Concurrent Programs (Cont.)

Mandatory	Owner	Concurrent Program Name	Description
No	Financial Intelligence	Update Time Dimension	<p>This program generates the Time dimension list of values on the reports, which is derived from the values of these BIS parameters:</p> <ul style="list-style-type: none"> ■ BIS: Global Start Date (mm/dd/yyyy) ■ BIS: Enterprise Calendar ■ BIS: Period Type ■ BIS: Start Day of Week <p>If there is a change in the GL Calendar Periods, or Period Types, or the GL Calendar itself is exchanged for another GL Calendar, the Update Time Dimension concurrent program must be re-run.</p> <p>The Update Time Dimension concurrent program automatically determines if time-related Sales Intelligence tables have been populated. If they have, then the Update Time Dimension concurrent program runs in incremental mode.</p>

Table B-1 Sales Intelligence Concurrent Programs (Cont.)

Mandatory	Owner	Concurrent Program Name	Description
No	Sales Intelligence	Load Opportunity Reports Summary Data (Request Set)	<p>This request set performs the data load of summary tables for the Sales Intelligence Opportunity Management reports. This program can be run in the modes All (A) or Incremental (I). Mode A will refresh all summary tables. Mode I will incrementally update the summary tables with the data that has changed since the last refresh. Tables accessed directly by the report packages are always refreshed, regardless of the mode of this program.</p> <p>This request set contains these concurrent programs:</p> <ul style="list-style-type: none"> ■ Load Opportunity Fact Table ■ Load Opportunity Sales Group Rollup Tables ■ Load Opportunity Product Rollup Table ■ Load Opportunity Count Tables ■ Load Opportunity Time Rollup Table ■ Load Opportunity Prospect/Customer Table
No	Sales Intelligence	Load Product Reports Summary Data	<p>This program performs the data load of summary tables for the Sales Intelligence Product Management reports. This program can be run in the All (A) mode only. Mode A will refresh all summary tables. (Single concurrent program.)</p>

