

# Oracle® MICROS Reporting and Analytics

## User Guide



Release 9.0  
E72023-09  
September 2023

The Oracle logo, consisting of a solid red square with the word "ORACLE" in white, uppercase, sans-serif font centered within it.

ORACLE®

Copyright © 2000, 2023, Oracle and/or its affiliates.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# Contents

## Preface

---

## 1 Using Reporting and Analytics

---

Using Reporting and Analytics	1-1
Choosing a Report Type	1-1
Choosing a Dashboard	1-2
Configuration Guidelines	1-4
Maintaining Organizations	1-4
Maintaining Users and Roles	1-5
Maintaining Point-of-Sale Data	1-5
Re-Aggregating Data	1-6

## 2 Analysis Reports

---

Analysis Report Examples	2-2
Report Walkthrough: Revenue and Cost Comparisons	2-5
Running, Printing, and Exporting Analysis Reports	2-8
Creating Analysis Reports	2-8
Managing Analysis Reports	2-9
Analysis Report Permissions	2-10
File Permissions and Publishing	2-10
Configuring Analysis Report Permissions	2-10
Publishing an Analysis Report	2-11
Analysis Report Date Session Variables	2-11

## 3 Core Reports

---

Running Reports	3-1
Modifying Reports	3-1
Exporting Reports	3-3

<b>4</b>	<b>Custom Reports in Microsoft Excel</b>	
	Installing iQuery	4-1
	Building a Custom Report in Microsoft Excel	4-1
<b>5</b>	<b>Scheduled Reports</b>	
	Scheduling Reports for Email Distribution	5-1
<b>6</b>	<b>Guest Check Information</b>	
	Retrieving Information with Check Query	6-1
	Retrieving Transaction Information with Audit & Analysis	6-1
	Exporting Audit & Analysis Queries	6-3
<b>7</b>	<b>Manager Communication</b>	
	Configuring Manager Log Entry Categories	7-1
	Working with the Manager Log	7-1
	Searching the Manager Log	7-2
	Adding an Entry to the Manager Log	7-2
	Updating and Closing an Entry	7-2
	Adding a Note to the Manager Log	7-2
<b>8</b>	<b>User Settings</b>	
	myPage	8-1
	Configuring myPage Content	8-1
	Configuring User Preferences	8-1
<b>9</b>	<b>Organizational Hierarchies</b>	
	Revenue Centers	9-1
	Adding Levels	9-2
	Adding Locations	9-2
	Establishing Relationships Between Levels and Locations	9-2
<b>10</b>	<b>Users and Roles</b>	
	Creating Roles	10-1
	Adding Users	10-2

## 11 End User Access to Content

---

Creating Portlets	11-1
Assigning Portlets to Roles	11-1
Assigning Side Menus to Roles	11-2
Assigning Reports to Roles	11-2
Outage Alerts	11-2
Setting Outage Alert Recipients	11-2
Installing Remote Transfer Agent (RTA) at a Location	11-3

## 12 Financial Calendars and Day Parts

---

Financial Calendars	12-1
Accounting Cycles	12-3
Last Week of the Financial Year	12-4
Creating a Financial Calendar	12-5
Creating a Financial Year with the Automated Wizard	12-5
Creating a Financial Year Manually	12-6
Creating Day Parts	12-6
Overriding Day Parts	12-6

## 13 Currency and Exchange Rate

---

Enabling Currency Configuration	13-1
Adding a Currency Type	13-1
Setting the Common Currency	13-1
Setting a Location's Currency	13-2
Adding and Updating Exchange Rates	13-2

## 14 Reason Codes

---

Creating Reason Codes	14-1
-----------------------	------

## 15 Reporting Hierarchies

---

Creating Reporting Hierarchies	15-1
--------------------------------	------

## 16 Item Alignment

---

Master Groups and Master Stores	16-1
Alignment Rules	16-2
Configuring a Master Group	16-3

Assigning a Location as a Master Store	16-3
Assigning Locations to the Master Group	16-3
Creating Alignment Rules	16-3
Manually Aligning Items	16-4

## 17 Category Groups

---

Creating Category Groups	17-1
Creating Category Group Hierarchies	17-1

## 18 Cost Tiers

---

Creating Cost Tiers	18-1
Assigning Menu Items to Cost Tiers	18-1

## 19 Legacy Reports

---

Converting Interactive Reports to Analysis Reports	19-1
Converting Ad Hoc Reports to Analysis Reports	19-2

## 20 Standard Export

---

# Preface

Oracle MICROS Reporting and Analytics is a web-based application that centralizes point-of-sale (POS) data to provide operational and analytical insights into business operations, and to improve efficiency by delivering information to all roles within an organization.

## **Purpose**

This document is intended for customers subscribed to Oracle MICROS Reporting and Analytics Advanced Cloud Services. Customers using Standard Cloud Services and On-Premise deployments may not have access to all features described in the documentation. Your organization type can affect visibility and access to features within Reporting and Analytics.

The navigation instructions throughout the documentation may not accurately depict the menu layout for your Oracle MICROS Enterprise Back Office deployment because administrators can customize the name and organization of the groups and links in the sidebar menu. Use the navigation instructions provided as a guideline for locating the links in your deployment, or contact an administrator for assistance.

## **Audience**

Oracle MICROS Enterprise Back Office documentation applies to the following users:

- Users who perform day-to-day operations with Enterprise Back Office and who typically do not have permissions to configure applications.
- Administrators who configure and maintain Enterprise Back Office. Administrators can also have permissions to configure applications.
- System Administrators or Super Administrators who maintain Enterprise Back Office servers and configuration files, implement initial application settings and configurations, and maintain back-end processes such as automated jobs and data interfaces with third-party applications.

## **Customer Support**

To contact Oracle Customer Support, access the Support Portal at the following URL:

<https://iccp.custhelp.com/>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

## Documentation

Oracle MICROS product documentation is available on the Oracle Help Center at <https://docs.oracle.com/en/industries/food-beverage/>.

## Revision History

**Table 1 Revision History**

Date	Description of Change
March 2017	Initial Publication
April 2017	Removed extraneous topics related to legacy reports.
September 2017	Corrected missing text in the Analysis Reports topic.
March 2018	Removed the Standard Export chapter and replaced with reference to the Standard Export User Guide that can be found in the Enterprise Back Office 9.0 library.
May 2018	Correction to the functionality listed for Analysis Reports.
March 2020	Updated Exporting Reports
February 2022	<ul style="list-style-type: none"> <li>• Updated Currency and Exchange Rate</li> <li>• Updated Enabling Currency Configuration</li> <li>• Updated Adding a Currency Type</li> <li>• Added Setting a Location's Currency</li> </ul>
September 2023	<ul style="list-style-type: none"> <li>• Updated guide title.</li> </ul>



# 1

## Using Reporting and Analytics

Oracle MICROS Reporting and Analytics is a web-based application that centralizes point-of-sale (POS) data to provide operational and analytical insights into business operations, and to improve efficiency by delivering information to all roles within an organization.

### Using Reporting and Analytics

Users can perform the following non-administrative tasks to retrieve data or to personalize Reporting and Analytics:

**Table 1-1 Using Reporting and Analytics**

I Want To	Go To
Build or run reports that consolidate and apply business analytics to Point-of-Sale data.	<a href="#">Choosing a Report Type</a>
View dashboards containing pre-constructed reports and data visualizations.	<a href="#">Choosing a Dashboard</a>
Search for details for specific guest checks.	<a href="#">Guest Check Information</a>
Read and post comments and status updates between managers.	<a href="#">Manager Communication</a>
View and configure a personal dashboard containing reports, visualizations, and widgets.	<a href="#">myPage</a>
Configure regional settings and personalize filter and login defaults.	<a href="#">User Settings</a>

### Choosing a Report Type

Point-of-Sale (POS) applications post data to the Enterprise Back Office database, and Reporting and Analytics applies business intelligence and analytics to the data to produce visualizations and reports for analysis and interpretation.

The reports generated by Reporting and Analytics include child reports, or drill-down reports, which inherit scope and properties from the parent report to display more extensive and detailed information about the user selection. For example, if you are looking at a sales report that includes a breakdown of sales by menu item, you can select a menu item to view a drill-down report containing sales, tax, and service charge details specific to the selected menu item.

Reporting and Analytics allows you to leverage the following types of reports:

**Table 1-2 Report Types**

<b>I Want To</b>	<b>Go To</b>
Reports that can be customized based on specific sets of data from operations subject areas and with applied business intelligence.	<a href="#">Analysis Reports</a>
Pre-defined reports that show information targeting specific business operations.	<a href="#">Core Reports</a>
Reports that can be customized with selected subjects and columns using a Microsoft Excel plug-in.	<a href="#">Custom Reports in Microsoft Excel</a>

## Choosing a Dashboard

Reporting and Analytics dashboards provide a collection of data and visualizations designed to give you an overview of information on one screen and to allow you to drill down for more detailed information. Some dashboards show different information depending on whether your location or organization is set to Table Service Restaurants (TSR) or Quick Service Restaurants (QSR).

You can add and view the following dashboards:

Table 1-3 Dashboards

Dashboard	Description
Operations	<p>The top level of the dashboard shows the daily total sales, the daily transaction count and average, the daily cost of operations, and the daily adjustments relative to the same day averages for the previous 8 weeks.</p> <p>If your location is set as a TSR, the top dashboard shows the following charts:</p> <ul style="list-style-type: none"> <li>• <b># of Checks and Avg Check</b></li> <li>• <b># Guests &amp; Spend Per Guest (SPG)</b></li> </ul> <p>And the dashboard drills down to show the following charts:</p> <ul style="list-style-type: none"> <li>• <b>Average Check, Number of Checks &amp; Net Sales By Location</b></li> <li>• <b>Net Sales And Average Check By Day Part</b></li> <li>• <b>Top 5 Locations By Average Check</b></li> </ul> <p>If your location is set as a QSR, the top dashboard shows the following charts:</p> <ul style="list-style-type: none"> <li>• <b># of Trans and Avg Trans</b></li> <li>• <b>Sales Per Labor Hour (SPLH)</b></li> </ul> <p>And the dashboard drills down to show the following charts:</p> <ul style="list-style-type: none"> <li>• <b>Average Transaction, Number of Transactions &amp; Net Sales By Location</b></li> <li>• <b>Net Sales And Average Check By Day Part</b></li> <li>• <b>Top 5 Locations By Transaction Count</b></li> </ul> <p>You can filter the dashboard by business date, location, revenue center, order type, and day part.</p> <p>If your organization or location uses value-added taxes (VAT), the top level of the dashboard include the VAT in Net Sales values, but drill-down charts do not include the VAT.</p>
Sales and Costs	<p>The top level of the dashboard shows the daily revenue and cost, the daily labor and hourly sales, and the daily cost of goods sold by major group.</p> <p>You can filter the dashboard by business date, location, revenue center, order type, and day part.</p>
Service Performance	<p>The top level of the dashboard shows the adjustments by hour, the average check by day part, the sales by order type and day part, the top and bottom five locations for service performance, and the top and bottom five employees for average check.</p> <ul style="list-style-type: none"> <li>• <b>TSR: Shows Guest Count by Day Part and Average Check by Day Part.</b></li> <li>• <b>QSR: Shows Average Trans by Day Part and Adjustment By Hour.</b></li> </ul> <p>You can filter the dashboard by business date, location, revenue center, order type, and day part.</p>
Labor	<p>The top level of the dashboard shows the weekly labor costs by job code, and the labor and sales totals by quarter hour.</p> <p>You can filter the dashboard by business date, location, revenue center, and day part.</p>

**Table 1-3 (Cont.) Dashboards**

Dashboard	Description
Inventory	<p>The top level of the dashboard shows the weekly top 20 receiving vendors, the weekly cost sales analysis by major groups, the comparison of cost by item group, and the top variance by cost center.</p> <p>You can filter the dashboard by business date, location, and cost center.</p>

 **Note:**

Oracle Fusion Middleware Oracle Business Intelligence online Help opens if you access online Help when creating or editing analysis reports or when working with dashboards. The Oracle Business Intelligence online Help may describe functionality not available in Reporting and Analytics.

## Configuration Guidelines

To optimize performance, ensure the quality and accuracy of reports, and maximize usage of Enterprise Back Office features, make sure that:

- Organization hierarchy is implemented for all locations.
- Financial calendars contain at least three years, and that there are no gaps or overlaps in dates.
- Day parts cover all 24 hours of each day for all 7 days in a week.
- Master Groups, Master Items, and Master Store are defined to accommodate menu item linking.
- Maintenance plan is implemented to periodically review and manually correct item alignment.
- Regional settings such as currency and exchange rates are implemented and maintained when applicable.

To ensure optimized performance, the Enterprise Back Office web application prompts authorized users for permission to perform database aggregation, or cleanup, after changes to certain configurations, such as financial calendar and currency.

## Maintaining Organizations

Administrators can configure and maintain levels, locations, and revenue centers in the Reporting and Analytics organization. Administrators can also configure and assign financial calendars, day parts, currency, exchange rates, and reason codes for the whole organization or for each level or location.

**Table 1-4 Managing Organizations**

I Want To	Go To
Configure the organizational hierarchy by maintaining the levels, locations, and revenue centers in the organization and by modifying the relationships between levels and locations.	<a href="#">Organizational Hierarchies</a>
Configure and assign calendar configurations and financial calendars.	<a href="#">Financial Calendars</a>
Configure and assign work day partitions.	<a href="#">Financial Calendars and Day Parts</a>
Assign the default and available currency used by the organization and by specific locations.	<a href="#">Currency and Exchange Rate</a>
Configure and assign a list of default reasons for performing operations such as returns and voids.	<a href="#">Reason Codes</a>

## Maintaining Users and Roles

Administrators can create user accounts, create and assign roles, and configure access and permissions for each role.

**Table 1-5 Managing Users and Roles**

I Want To	Go To
Create and maintain user accounts.	<a href="#">Users and Roles</a>
Create and maintain user groups.	<a href="#">Users and Roles</a>
Manage content and report permissions for user groups.	<a href="#">End User Access to Content</a>

## Maintaining Point-of-Sale Data

Administrators can configure how Oracle MICROS Reporting and Analytics stores and maintains data posted by Point-of-Sale applications. The following configurations allow administrators to set the scope and specificity of reports and business analysis operations for locations, revenue centers, roles, and so on:

**Table 1-6 Managing Point-of-Sale Data**

I Want To	Go To
Create groups of locations for collecting and assembling report totals.	<a href="#">Reporting Hierarchies</a>
Create and define the master entries under which all of the same items post and calculate.	<a href="#">Item Alignment</a>
Create and define item groupings to control the scope of reports.	<a href="#">Category Groups</a>
Create and assign item sets that are typically associated with vendors or sources.	<a href="#">Cost Tiers</a>

**Table 1-6 (Cont.) Managing Point-of-Sale Data**

I Want To	Go To
Re-aggregate after re-posting data for one or more days at a specific location.	<a href="#">Re-Aggregating Data</a>

## Re-Aggregating Data

You can configure a re-aggregation job for specific dates at a single location.

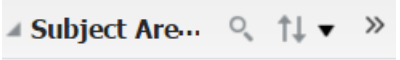
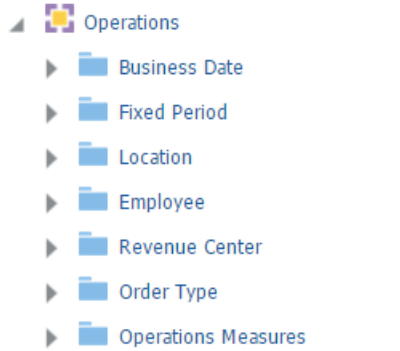
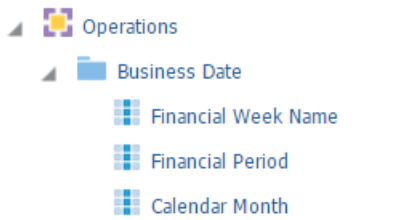

1. Log in to Reporting and Analytics using the **M** organization and system administrator credentials.
2. Click **System**, click **OBI Re-aggregation**, and then click **OBI Re-aggregation**.
3. Select your organization, select a location, add or remove dates for re-aggregation, and then click **Save**.

# 2


## Analysis Reports

Analysis Reports allow you to design and maintain reports and visualizations of data posted to Enterprise Back Office. Analysis reports are comprised of:

**Table 2-1 Analysis Report Components**

Analysis Report Component	Example	
Subject areas represent an area of business data that end users can view in the analysis report, and consist of folders, measure columns, attribute columns, hierarchical columns, and hierarchy levels.	The Operations subject area contains data for operations totals and counts, such as sales, guests, labor cost, cost of goods, and checks.	
Folders provide a named grouping of columns.	The Operations subject area contains six folders for attribute columns and one folder for measure columns, with a clear name for the folder containing measure columns.	
Attribute columns hold a flat list of values with no hierarchical relationships, and provide scope and constraints to the data presented by a report. The folders containing attribute columns unique to the selected subject area typically contain Definitions in their names.	The Business Date folder contains attribute columns such as financial period and calendar month.	
Hierarchical columns hold data values that are organized using named levels and parent-child relationships. Hierarchical columns allow users to drill down into the data, and their folder name typically contains Hierarchy.	The Business Date folder contains the Calendar Year Hierarchy column, which can drill down into the All Years, Calendar Year, Calendar Month, and Business Date Detail columns.	

**Table 2-1 (Cont.) Analysis Report Components**

Analysis Report Component	Example	
Measure columns hold a list of data values that typically reside in the Business Intelligence repository as a fact table, which can change or be added or aggregated. The folders containing measure columns typically contain <code>Measures</code> in their names.	The Operations subject area contains the Operations Measures folder, which contains measure columns such as Net Sales, Sales Count, and Number of Checks.	

You can select the operational subject area, or business model, that applies to the report or visualization you want to view or create, and then you can apply business analytics by:

- Selecting specific data sets to use in the report, and then applying filters to each data set.
- Selecting and configuring the resulting appearance of data, such as by rearranging columns and rows in the table, inserting visualizations and charts, and changing column labels.
- Adding and configuring user prompts to allow users viewing the report to configure data filters as needed. For example, you can add a date selection prompt to allow users to set the range of dates for which they need the report.

Oracle Fusion Middleware Oracle Business Intelligence online Help opens if you access online Help when creating or editing analysis reports or when working with dashboards. The Oracle Business Intelligence online Help may describe functionality not available in Reporting and Analytics.

## Analysis Report Examples

The following analysis reports provide examples of how you can leverage and implement analysis reports to solve business information needs.

### Chief Operating Officer

The Chief Operating Officer wants to view a comparison of sales for three signature hamburgers in different regions, and wants to view a comparison of sales at the district and location levels. You can create a report that allows the user to drill down the organizational levels, and to view yearly sales and revenue data that account for VAT and discounts, as shown in the following image:



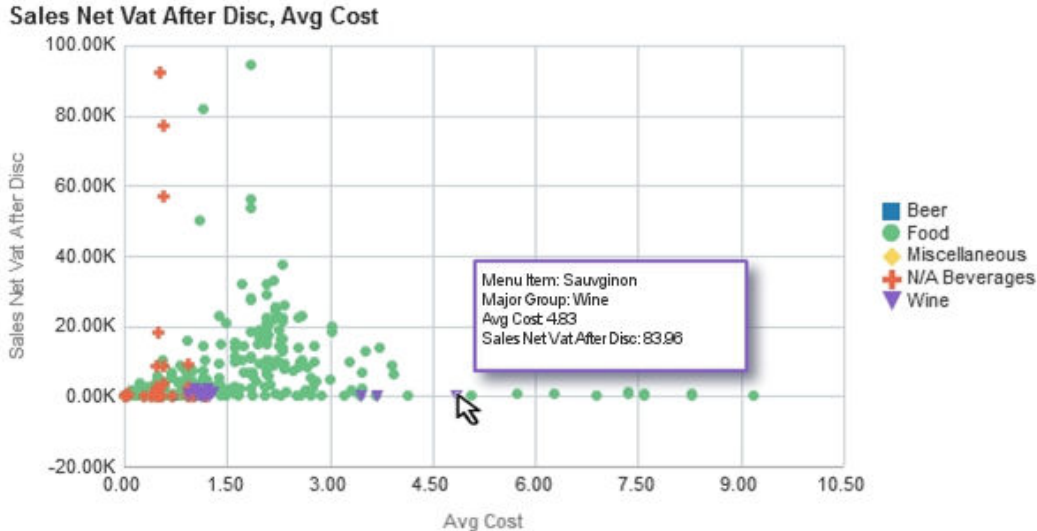
Figure 2-1 Example Sales Comparison Report

Location	Financial Year	Sales Net Vat After Disc			Sales Net Vat After Disc
		Hamburger	Cheese Burger	Dbl. Cheese Burger	
USA	FY2011	26,496.99	78,728.50	83,156.85	188,382.34
	FY2012	19,306.73	62,018.74	61,813.68	143,139.15
US Central	FY2011	4,133.28	11,485.23	14,503.16	30,121.67
	FY2012	3,035.54	8,394.62	11,973.33	23,403.49
US East	FY2011	15,656.13	49,340.39	50,544.63	115,541.15
	FY2012	12,863.76	41,721.00	35,573.68	90,158.44
Maryland	FY2011	15,656.13	49,340.39	50,544.63	115,541.15
	FY2012	12,863.76	41,721.00	35,573.68	90,158.44
Baltimore Location	FY2011	5,641.08	18,088.60	18,431.77	42,161.45
	FY2012	6,110.52	17,178.93	14,447.85	37,737.30
Columbia Location	FY2011	10,015.05	31,251.79	32,112.86	73,379.70
	FY2012	6,753.24	24,542.07	21,125.83	52,421.14
US West	FY2011	6,707.58	17,902.88	18,109.06	42,719.52

Store Manager

The Store Manager wants to identify the most and least profitable menu items, and to identify positive and negative sales and cost outliers. You can create a report that outputs a scatter plot graph to identify positive and negative data outliers. In the following example, the scatter chart plots the sales and costs of individual menu items to help you identify the items that sold well with low costs and items that sold poorly with high costs. The scatter chart also allows you to mouse over data points to identify specific menu items, as shown in the following image:

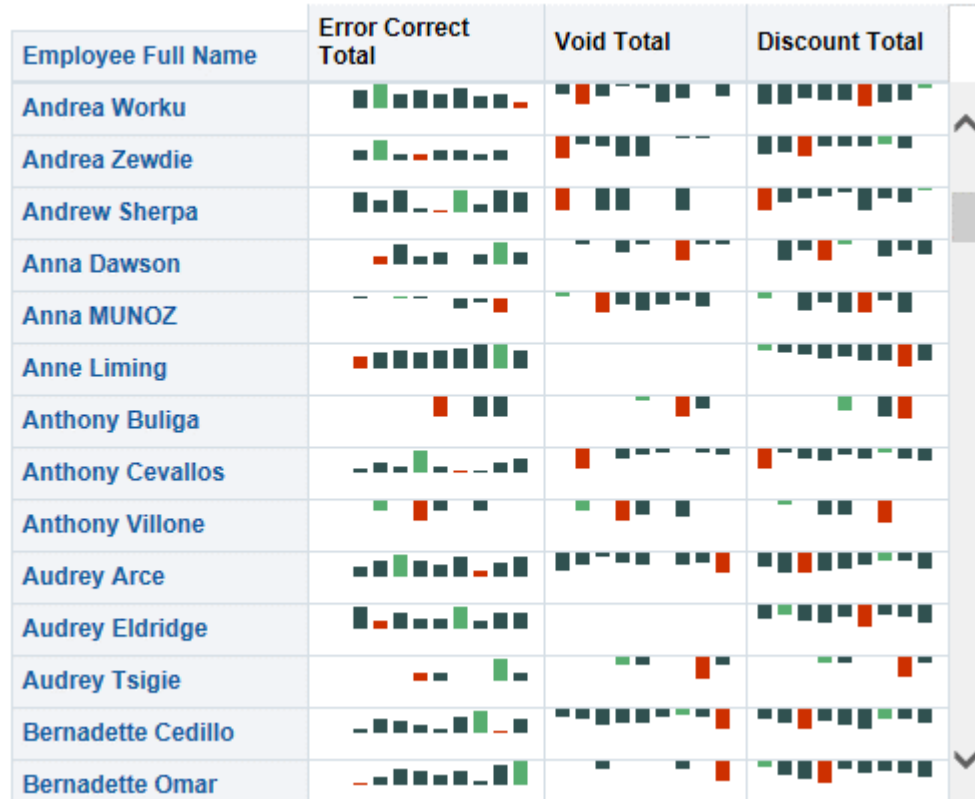
Figure 2-2 Example Scatter Chart Report for Data Outliers



### Loss Prevention Manager

The Loss Prevention Manager wants to identify employees with increasing error correction totals due to it being a potential sign of fraud. You can create a report that lists the employees and shows a histogram of their total error corrections, discount totals, and void totals per week for the previous nine weeks, as shown in the following image:

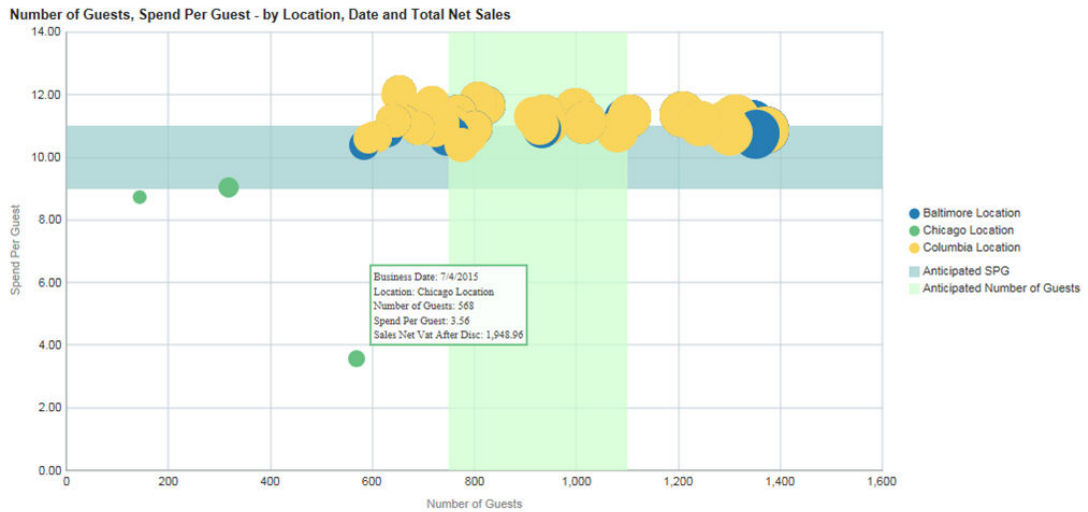
Figure 2-3 Example Employee Histogram



### Business Analyst

The Business Analyst wants to determine which locations are most profitable with the guests they attract, which locations are upselling, which locations could profit by upselling more items, and which locations have trouble attracting customers. You can create a report that shows a bubble graph to indicate the number of guests and the amount spent per guest (SPG), along with scale markers (the blue and green areas) to identify indicate a target range, as shown in the following image:

**Figure 2-4 Example Bubble Graph Report for Number of Guests and Amount Spend Per Guest**



## Report Walkthrough: Revenue and Cost Comparisons

This topic provides an example walkthrough of how a store manager can design and create an analysis report to address a business need.

### Identify the Data Shown by the Report

A store manager wants a visualized comparison of revenue and costs between a single day and a previous day. To determine the data to be shown by the report, the store manager conceptualizes the information needs and decides that the report should include:

- The total revenue at a location for each business hour.
- A historical comparison of total revenue for a selected day and a previous day.
- The percentage of revenue consumed by food costs, and the percentage of revenue consumed by labor costs.
- A historical comparison of the percent of revenue consumed by the respective costs.

### Add Data Columns to the Report

On the **Criteria** tab, the store manager adds the following basic columns:

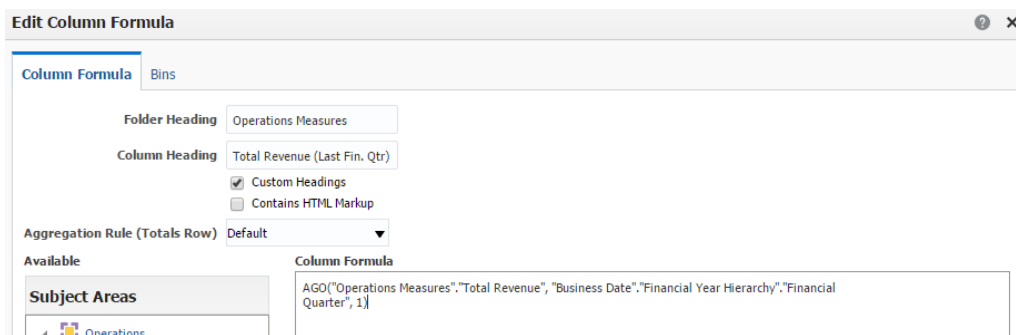
- Business Date/Business Date
- Fixed Period/Business Hour
- Operations Measures/Food Cost %
- Operations Measures/Labor Cost%
- Operations Measures/Total Revenue

To set specific previous day intervals, the store manager adds and customizes the following columns:

- Operations Measures/Food Cost % (Last Financial Week): AGO("Operations Measures"."Food Cost %", "Business Date"."Financial Year Hierarchy"."Financial Week",1)
- Operations Measures/Food Cost % (Last Financial Quarter): AGO("Operations Measures"."Food Cost %", "Business Date"."Financial Year Hierarchy"."Financial Quarter",1)
- Operations Measures/Labor Cost % (Last Financial Week): AGO("Operations Measures"."Labor Cost %", "Business Date"."Financial Year Hierarchy"."Financial Week",1)
- Operations Measures/Labor Cost % (Last Financial Quarter): AGO("Operations Measures"."Labor Cost %", "Business Date"."Financial Year Hierarchy"."Financial Quarter",1)
- Operations Measures/Total Revenue(Last Financial Week): AGO("Operations Measures"."Total Revenue", "Business Date"."Financial Year Hierarchy"."Financial Week",1)
- Operations Measures/Total Revenue (Last Financial Quarter): AGO("Operations Measures"."Total Revenue", "Business Date"."Financial Year Hierarchy"."Financial Quarter",1)

The following image shows an example of a customized column:

**Figure 2-5 Total Revenue (Last Financial Quarter) Column Customization**



### Add Visualizations to the Report

On the **Results** tab, the store manager begins adding and configuring the report layout and style. To set up a line-bar graph to show the **Total Revenue Comparison by Hour and Food Cost %**, the store manager maps the data columns as shown in the following image:

**Figure 2-6 Total Revenue Comparison by Hour and Food Cost % Graph Customization**

**Layout**

Drop here for sectioned view

---

**Line-Bar Graph**

Measures  Use unified scale

**Bars (Vertical Axis 1)**

- Total Revenue
- Total Revenue (Last Fin. Week)
- Total Revenue (Last Fin. Qtr)

**Lines (Vertical Axis 2)**

- Food Cost %
- Food Cost % (Last Fin. Week)
- Food Cost % (Last Fin. Qtr)

**Bars and Lines**

Group By (Horizontal Axis)

- Business Hour

Vary Color By (Horizontal Axis)

- Show In Legend
- Measure Labels

---

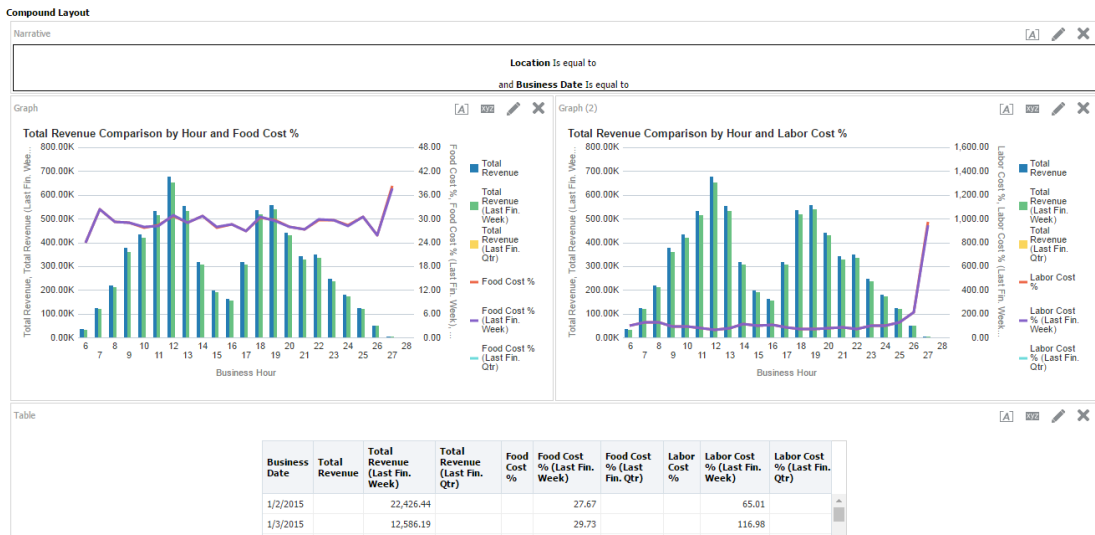
**Excluded**

- Labor Cost %
- Labor Cost % (Last Fin. Week)
- Labor Cost % (Last Fin. Qtr)
- Business Date

The store manager adds a similar line-bar graph to show **Total Revenue Comparison by Hour and Labor Cost %**, and then adds a table to the bottom of the report for a simple numeric display of the data.

The following image shows the report after the store manager adds the two visualizations and table:

**Figure 2-7 Sales Comparison Report**



## Running, Printing, and Exporting Analysis Reports

1. Make sure the report you want to run has been published. Reporting and Analytics only shows reports for which you have access.
2. In the Reporting and Analytics side menu, click the link to go to the **More Reports** page. If you cannot find the link, contact your system administrator.
3. Click **Analysis Reports**, and then click a published report.
4. To run and view the analysis report, select or enter the report parameters, and then click **OK**.
5. To clear the report parameters, click **Reset**.
6. To print the analysis report, click **Print**, and then select a printable format.
7. To export the analysis report, click **Export**, and then select a file or data format.
8. To add the analysis report to a collection of reports and dashboards, click **Add to Briefing Book**. You can download the briefing book as a PDF or HTML.

## Creating Analysis Reports

The *Oracle Fusion Middleware User's Guide for Oracle Business Intelligence Enterprise Edition* contains information and instructions for using the analysis editor, but also contains information for features and functionality not included in the Reporting and Analytics implementation.

1. In the Reporting and Analytics side menu, click the link to go to the **Analysis Reports** page. If you cannot find the link, contact your system administrator.
2. Click **Create Analysis**, and then click the subject area for which you want to create the report.
3. Configure the report:
  - a. On the **Criteria** tab, drag and drop columns from the **Subject Area** pane to the **Selected Columns** pane to add columns to the report and to configure default sorting and filters.
  - b. On the **Criteria** tab, add, edit, and remove filters in the **Filters** pane. You must keep the **Business Date** and **Location** filters to allow the report to publish and to allow ReportMail to work with the report.
  - c. On the **Results** tab, preview the appearance and output of the report, and edit the layout of the report. You can customize the appearance of the report, change column labels, and apply aggregation rules for direct database requests.
  - d. On the **Results** tab, you can configure rules for data selection in the **Selection Steps** pane to refine the data on which the report works.
  - e. On the **Prompts** tab, you can add and configure user input prompts in the **Prompts** pane to create a form in which users specify their report parameters.
  - f. On the **Prompts** tab, you can configure the title, text, and appearance of the prompts form in the **Display** pane.
4. To add subject areas to the report:

- a. On the **Criteria** tab, click **Show More Buttons** in the **Subject Area** pane.
  - b. Click **Add / Remove Subject Areas**, select the subject areas, and then click **OK**
5. To add and configure columns for the report:
  - a. On the **Criteria** tab, find the columns you want to add to the report in the **Subject Area** pane.

If you added another subject area to the report, measure columns do not return values if the attribute and hierarchy columns in the report do not apply to all subject areas.
  - b. Drag and drop the columns to the **Selected Columns** pane.
  - c. To configure the sorting order for a column, click the configure icon, select **Sort**, and then select the sorting method.
  - d. To change the aggregation rule for a column, click the configure icon, select **Edit Formula**, and then select the **Aggregation Rule** from the drop-down list.
  - e. To configure filters for a column, click the configure icon, select **Filter**, and then configure the filter for the column.
6. To add a filter for a subject area element that is not a column in the report:
  - a. On the **Criteria** tab, click the **Create a filter for the current Subject Area** button in the **Filters** pane.
  - b. Navigate to the subject area element by which you want to filter, and then click **OK**.
  - c. Configure the filter settings, and then click **OK**.
7. To add and configure prompts for user input when running the report:
  - a. On the **Prompts** tab, click the **New** button.
  - b. Select the type of prompt you want to add.
  - c. Configure the prompt, and then click **OK**.
8. To configure the prompt form:
  - a. On the **Prompts** tab, click the **Edit** button in the **Display** pane.
  - b. Configure the form, such as by setting the title and information text to show with the user input prompts, and then click **OK**.
9. Click **Save As** to save the report in your `My Folder`. You can now publish the report.

## Managing Analysis Reports

If you have access to the Oracle Business Intelligence (OBI) portlet, you can access the analysis reports that you created and saved to your personal folder.

1. In the Reporting and Analytics side menu, click the link to go to the **Analysis Reports** page. If you cannot find the link, contact your system administrator.
2. Click **Modify/Delete Analysis**.
3. In **My Folders**, navigate to the analysis report.
4. To edit the analysis report, click **Edit**. Changes to the report only affect your local instance and do not affect the published instance of the report. If you want to apply changes to a published report, you must unpublish and then republish the report.
5. To print the analysis report, right-click the report, click **Print**, and then select a printable format.

6. To export the analysis report, right-click the report, click **Export**, and then select a file or data format.
7. To delete the analysis report, right-click the report, and then click **Delete**. This does not affect the published instance of a report.
8. To make a copy of the analysis report, right-click the report, and then click **Copy**.
9. To change the filename of the analysis report, right-click the report, and then click **Rename**. This does not affect the published instance of a report.

## Analysis Report Permissions

Analysis Reports implement the following user permissions:

- All users with access to OBIEE Analysis can create, preview, modify, and publish their own reports through the portlet.  
Users with the **Publish/Un-Publish Analysis** permission can publish reports created by other users.
- All users, regardless of access to OBIEE Analysis, can run published reports, and can then export, print, add to a briefing book, and copy the analysis XML for the report output.

## File Permissions and Publishing

Analysis Reports enforce file permissions by restricting access to the `My Folder` for each user account and to the `Shared Folder` for each organization:

- Only the specific user can view and access the contents of their `My Folder`.
- All users can view the content of the `Shared Folder` but cannot enact changes.

When you create an analysis report, the system creates and saves the report in your `My Folder`. This prevents all other users from being able to run and perform modifications on your report.

When you publish the report, the system creates a copy of your saved report in the `Shared Folder`, and allows users without access to the OBIEE Analysis portlet to run the report.

## Configuring Analysis Report Permissions

1. In the Reporting and Analytics side menu, click the link to go to the **Role Portlets Administrator For** page. If you cannot find the link, contact your system administrator.
2. Select the user role for which you want to configure analysis reports publishing permissions, and then click **Configure**.
3. Add the OBIEE Analysis portlet, or select **OBIEE Analysis** and then click **Edit**.
4. Select or unselect **Publish/Un-Publish Analysis**, and then click **Save**.



## Publishing an Analysis Report

1. In the Reporting and Analytics side menu, click the link to go to the **Analysis Reports** page. If you cannot find the link, contact your system administrator.
2. Click **Publish Analysis**.
3. Use the filters to find and select the report for which you want to configure permissions, and then click **Publish**.
4. Select whether to configure permissions for the report at the **Roles** level or at the individual **Users** level.

You cannot configure a report to have both role-level and user-level permissions. For example, if you configure role-based permissions for a report, and then configure user-based permissions, the user-based permissions overwrite the role-based permissions.

5. Use the lists and arrows to add or remove permissions, and then click **Save**.

## Analysis Report Date Session Variables

You can use the Oracle Business Intelligence function or session variables installed by Reporting and Analytics as described in the following tables when configuring formulas and columns for dates in Analysis Reports.

All examples assume that:

- The Point-of-Sale application at the store runs End-of-Day (EOD) operations every day, even when the store remains closed.
- The starting day of the week for the 4-4-4 financial year is Thursday.

### Today and Yesterday

The *Today* and *Yesterday* variables do not work based off of the current calendar date, as described in the following table:

Table 2-2 Today and Yesterday

Session Variable Name	Description	Examples
To-day	The most recent day that a guest check was entered into the system.	<p>If a store opens Monday, December 27 and you run a report for <i>Today</i>:</p> <ul style="list-style-type: none"> <li>• Before entering a guest check, the report runs for Sunday, December 26. In this situation, the system continues to recognize Sunday as <i>To-day</i> because that remains the most recent day that a guest check was entered into the system.</li> <li>• After entering a guest check, the report runs for Monday, December 27. In this situation, the system recognizes that the new guest check was entered on Monday, December 27, and therefore recognizes Monday as the latest day that a guest check was entered into the system.</li> </ul>
Yesterday	The most recent closed (full) business day.	<p>If a store opens Monday, December 27, and you run a report for <i>Yesterday</i>, the report runs for Sunday, December 26.</p> <p>If your store runs EOD operations at 7 PM and you run the report at 9 PM, the report runs for Monday, December 27, because the EOD operation has closed the Monday business day.</p>

### Days

You can use the following variables to perform calculations based on a specific day relative to the most recent closed business day, or *Yesterday*.

**Table 2-3 Day Session Variables**

Session Variable Name	Description	Examples																																																																																																														
SameDayLastWeek	The day that is one financial week prior to <i>Yesterday</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>SameDayLastWeek</i>, the report runs for Sunday, May 20.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31																																																													
Period 13							May																																																																																																									
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																									
49	3	4	5	6	7	8	9																																																																																																									
50	10	11	12	13	14	15	16																																																																																																									
51	17	18	19	20	21	22	23																																																																																																									
52	24	25	26	27	28	29	30																																																																																																									
	31																																																																																																															
SameDayLastYear	The day that is one financial year prior to <i>Yesterday</i> .	<p>The current day is Monday, May 28. When a report runs to calculate revenue for <i>SameDayLastYear</i>, the report calculates the revenue for Sunday, May 28 the previous year.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 13							May	Wk	We	Th	Fr	Sa	Su	Mo	Tu	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31							Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31						
Period 13							May																																																																																																									
Wk	We	Th	Fr	Sa	Su	Mo	Tu																																																																																																									
49	3	4	5	6	7	8	9																																																																																																									
50	10	11	12	13	14	15	16																																																																																																									
51	17	18	19	20	21	22	23																																																																																																									
52	24	25	26	27	28	29	30																																																																																																									
	31																																																																																																															
Period 13							May																																																																																																									
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																									
49	3	4	5	6	7	8	9																																																																																																									
50	10	11	12	13	14	15	16																																																																																																									
51	17	18	19	20	21	22	23																																																																																																									
52	24	25	26	27	28	29	30																																																																																																									
	31																																																																																																															

**Table 2-3 (Cont.) Day Session Variables**

Session Variable Name	Description	Examples																																																																																																														
SameDateLastYear	The same date as <i>Yesterday</i> in the previous financial year.	<p>The current day is Monday, May 28. When a report runs to calculate revenue for <i>SameDateLastYear</i>, the report calculates the revenue for Saturday, December 27 the previous year.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 13							May	Wk	We	Th	Fr	Sa	Su	Mo	Tu	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31							Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31						
Period 13							May																																																																																																									
Wk	We	Th	Fr	Sa	Su	Mo	Tu																																																																																																									
49	3	4	5	6	7	8	9																																																																																																									
50	10	11	12	13	14	15	16																																																																																																									
51	17	18	19	20	21	22	23																																																																																																									
52	24	25	26	27	28	29	30																																																																																																									
	31																																																																																																															
Period 13							May																																																																																																									
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																									
49	3	4	5	6	7	8	9																																																																																																									
50	10	11	12	13	14	15	16																																																																																																									
51	17	18	19	20	21	22	23																																																																																																									
52	24	25	26	27	28	29	30																																																																																																									
	31																																																																																																															

**Weeks**

You can use the following variables to perform calculations based on a specific week.

**Table 2-4 Week Session Variables**

Variable Name	Description	Examples																																																							
Past7Days	The seven most recent full (closed) business days.	<p>If a store opens Monday, May 28, and you run a report for <i>Past7Days</i>, the report runs for Monday, May 21 to Sunday, May 27.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31						
Period 13							May																																																		
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																		
49	3	4	5	6	7	8	9																																																		
50	10	11	12	13	14	15	16																																																		
51	17	18	19	20	21	22	23																																																		
52	24	25	26	27	28	29	30																																																		
	31																																																								

**Table 2-4 (Cont.) Week Session Variables**

Variable Name	Description	Examples																																																								
CurrentFinancialWeek	The financial week that includes <i>Yesterday</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>CurrentFinancialWeek</i>, the report runs for Thursday, May 24 to Wednesday, May 30.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td>52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td></td> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30		31						
Period 13							May																																																			
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																			
49	3	4	5	6	7	8	9																																																			
50	10	11	12	13	14	15	16																																																			
51	17	18	19	20	21	22	23																																																			
52	24	25	26	27	28	29	30																																																			
	31																																																									
LastWeekFinancial	The financial week that includes <i>SameDayLastWeek</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>LastWeekFinancial</i>, the system determines <i>SameDayLastWeek</i> is Sunday, May 20, and the report runs for Thursday, May 17 to Wednesday, May 23.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td>52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td></td> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30		31						
Period 13							May																																																			
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																			
49	3	4	5	6	7	8	9																																																			
50	10	11	12	13	14	15	16																																																			
51	17	18	19	20	21	22	23																																																			
52	24	25	26	27	28	29	30																																																			
	31																																																									
LastWeekWTDFinancial	The days in the previous financial week up to and including <i>SameDayLastWeek</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>LastWeekWTDFinancial</i>, the system determines <i>SameDayLastWeek</i> is Sunday, May 20, and the report runs for Thursday, May 17 to Sunday, May 20.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td>52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td></td> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30		31						
Period 13							May																																																			
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																			
49	3	4	5	6	7	8	9																																																			
50	10	11	12	13	14	15	16																																																			
51	17	18	19	20	21	22	23																																																			
52	24	25	26	27	28	29	30																																																			
	31																																																									

**Table 2-4 (Cont.) Week Session Variables**

Variable Name	Description	Examples
SameWTDLastYearFinancial	The days in the corresponding financial week in the previous financial year up to and including <i>SameDayLastYear</i> .	If a store opens Monday, May 28, and you run a report for <i>SameWTDLastYearFinancial</i> , the system determines <i>SameDayLastYear</i> is Sunday, May 28, and the report runs for Wednesday, May 24 to Sunday, May 28.

Period 13							May
Wk	We	Th	Fr	Sa	Su	Mo	Tu
49	3	4	5	6	7	8	9
50	10	11	12	13	14	15	16
51	17	18	19	20	21	22	23
52	24	25	26	27	28	29	30
	31						

Period 13							May
Wk	Th	Fr	Sa	Su	Mo	Tu	We
49	3	4	5	6	7	8	9
50	10	11	12	13	14	15	16
51	17	18	19	20	21	22	23
52	24	25	26	27	28	29	30
	31						

**Months**

You can use the following variables to perform calculations based on a specific month.

**Table 2-5 Month Session Variables**

Variable Name	Description	Examples																																																																																																																																																										
CurrentMonth	The days in the current calendar month up to and including <i>Yesterday</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>CurrentMonth</i>, the report runs for Tuesday, May 1 to Sunday, May 27.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 12</th> <th colspan="2">Apr/May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>45</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>46</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>47</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>48</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>1</td> <td>2</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th colspan="2">May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 12							Apr/May		Wk	Th	Fr	Sa	Su	Mo	Tu	We	45	5	6	7	8	9	10	11	46	12	13	14	15	16	17	18	47	19	20	21	22	23	24	25	48	26	27	28	29	30	1	2	Period 13							May		Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31																																																							
Period 12							Apr/May																																																																																																																																																					
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																																																																					
45	5	6	7	8	9	10	11																																																																																																																																																					
46	12	13	14	15	16	17	18																																																																																																																																																					
47	19	20	21	22	23	24	25																																																																																																																																																					
48	26	27	28	29	30	1	2																																																																																																																																																					
Period 13							May																																																																																																																																																					
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																																																																					
49	3	4	5	6	7	8	9																																																																																																																																																					
50	10	11	12	13	14	15	16																																																																																																																																																					
51	17	18	19	20	21	22	23																																																																																																																																																					
52	24	25	26	27	28	29	30																																																																																																																																																					
	31																																																																																																																																																											
LastMonthMTD	The days in the previous calendar month up to and including the same date as <i>Yesterday</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>LastMonthMTD</i>, the report runs for Tuesday, May 1 to Sunday, May 27.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 11</th> <th colspan="2">Mar/Apr</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>41</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> </tr> <tr> <td>42</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> </tr> <tr> <td>43</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> </tr> <tr> <td>44</td> <td>29</td> <td>30</td> <td>31</td> <td>1</td> <td>2</td> <td>3</td> <td>4</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 12</th> <th colspan="2">Apr/May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>45</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>46</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>47</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>48</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>1</td> <td>2</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th colspan="2">May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 11							Mar/Apr		Wk	Th	Fr	Sa	Su	Mo	Tu	We	41	8	9	10	11	12	13	14	42	15	16	17	18	19	20	21	43	22	23	24	25	26	27	28	44	29	30	31	1	2	3	4	Period 12							Apr/May		Wk	Th	Fr	Sa	Su	Mo	Tu	We	45	5	6	7	8	9	10	11	46	12	13	14	15	16	17	18	47	19	20	21	22	23	24	25	48	26	27	28	29	30	1	2	Period 13							May		Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31						
Period 11							Mar/Apr																																																																																																																																																					
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																																																																					
41	8	9	10	11	12	13	14																																																																																																																																																					
42	15	16	17	18	19	20	21																																																																																																																																																					
43	22	23	24	25	26	27	28																																																																																																																																																					
44	29	30	31	1	2	3	4																																																																																																																																																					
Period 12							Apr/May																																																																																																																																																					
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																																																																					
45	5	6	7	8	9	10	11																																																																																																																																																					
46	12	13	14	15	16	17	18																																																																																																																																																					
47	19	20	21	22	23	24	25																																																																																																																																																					
48	26	27	28	29	30	1	2																																																																																																																																																					
Period 13							May																																																																																																																																																					
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																																																																					
49	3	4	5	6	7	8	9																																																																																																																																																					
50	10	11	12	13	14	15	16																																																																																																																																																					
51	17	18	19	20	21	22	23																																																																																																																																																					
52	24	25	26	27	28	29	30																																																																																																																																																					
	31																																																																																																																																																											

**Table 2-5 (Cont.) Month Session Variables**

Variable Name	Description	Examples																																																																																																																																																																																																																				
SameMTDLastYear	The days in the same calendar month of the previous year, up to and including the same date as <i>Yesterday</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>SameMTDLastYear</i>, the report runs for Monday, May 1 to Saturday, May 27 for the previous year.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 12</th> <th colspan="2">Apr/May</th> </tr> <tr> <th>Wk</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> </tr> </thead> <tbody> <tr><td>45</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>46</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>47</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>48</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td></tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th colspan="2">May</th> </tr> <tr> <th>Wk</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> </tr> </thead> <tbody> <tr><td>49</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr> <tr><td>50</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td></tr> <tr><td>51</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><td>52</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr> <tr><td></td><td>31</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 12</th> <th colspan="2">Apr/May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr><td>45</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>46</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>47</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>48</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td></tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th colspan="2">May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr><td>49</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr> <tr><td>50</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td></tr> <tr><td>51</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><td>52</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr> <tr><td></td><td>31</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>	Period 12							Apr/May		Wk	We	Th	Fr	Sa	Su	Mo	Tu	45	5	6	7	8	9	10	11	46	12	13	14	15	16	17	18	47	19	20	21	22	23	24	25	48	26	27	28	29	30	1	2	Period 13							May		Wk	We	Th	Fr	Sa	Su	Mo	Tu	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30		31							Period 12							Apr/May		Wk	Th	Fr	Sa	Su	Mo	Tu	We	45	5	6	7	8	9	10	11	46	12	13	14	15	16	17	18	47	19	20	21	22	23	24	25	48	26	27	28	29	30	1	2	Period 13							May		Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30		31						
Period 12							Apr/May																																																																																																																																																																																																															
Wk	We	Th	Fr	Sa	Su	Mo	Tu																																																																																																																																																																																																															
45	5	6	7	8	9	10	11																																																																																																																																																																																																															
46	12	13	14	15	16	17	18																																																																																																																																																																																																															
47	19	20	21	22	23	24	25																																																																																																																																																																																																															
48	26	27	28	29	30	1	2																																																																																																																																																																																																															
Period 13							May																																																																																																																																																																																																															
Wk	We	Th	Fr	Sa	Su	Mo	Tu																																																																																																																																																																																																															
49	3	4	5	6	7	8	9																																																																																																																																																																																																															
50	10	11	12	13	14	15	16																																																																																																																																																																																																															
51	17	18	19	20	21	22	23																																																																																																																																																																																																															
52	24	25	26	27	28	29	30																																																																																																																																																																																																															
	31																																																																																																																																																																																																																					
Period 12							Apr/May																																																																																																																																																																																																															
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																																																																																																																															
45	5	6	7	8	9	10	11																																																																																																																																																																																																															
46	12	13	14	15	16	17	18																																																																																																																																																																																																															
47	19	20	21	22	23	24	25																																																																																																																																																																																																															
48	26	27	28	29	30	1	2																																																																																																																																																																																																															
Period 13							May																																																																																																																																																																																																															
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																																																																																																																															
49	3	4	5	6	7	8	9																																																																																																																																																																																																															
50	10	11	12	13	14	15	16																																																																																																																																																																																																															
51	17	18	19	20	21	22	23																																																																																																																																																																																																															
52	24	25	26	27	28	29	30																																																																																																																																																																																																															
	31																																																																																																																																																																																																																					

**Financial Periods**

You can use the following variables to perform calculations based on a specific financial period.



**Table 2-6 Financial Period Session Variables**

Variable Name	Description	Examples																																																																																																							
CurrentFinancialPeriod	The days in the current financial period up to and including <i>Yesterday</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>CurrentFinancialPeriod</i>, the report runs for Thursday, May 3 to Sunday, May 27.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31																																																						
Period 13							May																																																																																																		
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																		
49	3	4	5	6	7	8	9																																																																																																		
50	10	11	12	13	14	15	16																																																																																																		
51	17	18	19	20	21	22	23																																																																																																		
52	24	25	26	27	28	29	30																																																																																																		
	31																																																																																																								
LastPeriodPTDFinancial	The days in the previous financial period up to and including the day in the period that corresponds to <i>Yesterday</i> .	<p>If a store opens Monday, May 28, and you run a report for <i>LastPeriodPTDFinancial</i>, the report runs for Thursday, April 5 to Sunday, April 29.</p> <table border="1"> <thead> <tr> <th colspan="7">Period 12</th> <th>Apr/May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>45</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> <td>10</td> <td>11</td> </tr> <tr> <td>46</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> <td>17</td> <td>18</td> </tr> <tr> <td>47</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> <td>24</td> <td>25</td> </tr> <tr> <td>48</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> <td>1</td> <td>2</td> </tr> </tbody> </table> <table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr> <td>49</td> <td>3</td> <td>4</td> <td>5</td> <td>6</td> <td>7</td> <td>8</td> <td>9</td> </tr> <tr> <td>50</td> <td>10</td> <td>11</td> <td>12</td> <td>13</td> <td>14</td> <td>15</td> <td>16</td> </tr> <tr> <td>51</td> <td>17</td> <td>18</td> <td>19</td> <td>20</td> <td>21</td> <td>22</td> <td>23</td> </tr> <tr> <td rowspan="2">52</td> <td>24</td> <td>25</td> <td>26</td> <td>27</td> <td>28</td> <td>29</td> <td>30</td> </tr> <tr> <td>31</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Period 12							Apr/May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	45	5	6	7	8	9	10	11	46	12	13	14	15	16	17	18	47	19	20	21	22	23	24	25	48	26	27	28	29	30	1	2	Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30	31						
Period 12							Apr/May																																																																																																		
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																		
45	5	6	7	8	9	10	11																																																																																																		
46	12	13	14	15	16	17	18																																																																																																		
47	19	20	21	22	23	24	25																																																																																																		
48	26	27	28	29	30	1	2																																																																																																		
Period 13							May																																																																																																		
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																																																																		
49	3	4	5	6	7	8	9																																																																																																		
50	10	11	12	13	14	15	16																																																																																																		
51	17	18	19	20	21	22	23																																																																																																		
52	24	25	26	27	28	29	30																																																																																																		
	31																																																																																																								

**Table 2-6 (Cont.) Financial Period Session Variables**

Variable Name	Description	Examples
SamePTDLastYearFinancial	The days in the same financial period of the previous financial year, up to and including the same day as <i>Yesterday</i> .	If a store opens Monday, May 28, and you run a report for <i>SamePTDLastYearFinancial</i> , the report runs for Wednesday, May 3 to Saturday, May 27.

Period 13							May
Wk	We	Th	Fr	Sa	Su	Mo	Tu
49	3	4	5	6	7	8	9
50	10	11	12	13	14	15	16
51	17	18	19	20	21	22	23
52	24	25	26	27	28	29	30
	31						

Period 13							May
Wk	Th	Fr	Sa	Su	Mo	Tu	We
49	3	4	5	6	7	8	9
50	10	11	12	13	14	15	16
51	17	18	19	20	21	22	23
52	24	25	26	27	28	29	30
	31						

**Financial Quarters**

You can use the following variables to perform calculations based on a specific financial quarter.

**Table 2-7 Financial Quarter Session Variables**

Variable Name	Description	Examples
CurrentFinancialQuarter	The days in the current financial quarter up to and including <i>Yesterday</i> .	If a store opens Monday, May 28, and you run a report for <i>CurrentFinancialQuarter</i> , the report runs for Thursday, February 8 to Sunday, May 27.

Period 10 Feb/Mar							
Wk	Th	Fr	Sa	Su	Mo	Tu	We
37	8	9	10	11	12	13	14
38	15	16	17	18	19	20	21
39	22	23	24	25	26	27	28
40	1	2	3	4	5	6	7

Period 11 Mar/Apr							
Wk	Th	Fr	Sa	Su	Mo	Tu	We
41	8	9	10	11	12	13	14
42	15	16	17	18	19	20	21
43	22	23	24	25	26	27	28
44	29	30	31	1	2	3	4

Period 12 Apr/May							
Wk	Th	Fr	Sa	Su	Mo	Tu	We
45	5	6	7	8	9	10	11
46	12	13	14	15	16	17	18
47	19	20	21	22	23	24	25
48	26	27	28	29	30	1	2

Period 13 May							
Wk	Th	Fr	Sa	Su	Mo	Tu	We
49	3	4	5	6	7	8	9
50	10	11	12	13	14	15	16
51	17	18	19	20	21	22	23
52	24	25	26	27	28	29	30
	31						

Table 2-7 (Cont.) Financial Quarter Session Variables

Variable Name	Description	Examples
LastQuarterQTDFinancial	The days in the previous financial quarter up to and including the day in the quarter that corresponds to <i>Yesterday</i> .	If a store opens Monday, May 28, and you run a report for <i>CurrentFinancialQuarter</i> , the report runs for Thursday, November 16 to Sunday, February 7.

Period 7							Period 10							Feb/Mar																	
Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We								
25	16	17	18	19	20	21	22	37	8	9	10	11	12	13	14																
26	23	24	25	26	27	28	29	38	15	16	17	18	19	20	21																
27	30	1	2	3	4	5	6	39	22	23	24	25	26	27	28																
28	7	8	9	10	11	12	13	40	1	2	3	4	5	6	7																
Period 8							Dec/Jan							Period 11							Mar/Apr										
Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We
29	14	15	16	17	18	19	20	41	8	9	10	11	12	13	14																
30	21	22	23	24	25	26	27	42	15	16	17	18	19	20	21																
31	28	29	30	31	1	2	3	43	22	23	24	25	26	27	28																
32	4	5	6	7	8	9	10	44	29	30	31	1	2	3	4																
Period 9							Jan/Feb							Period 12							Apr/May										
Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We
33	11	12	13	14	15	16	17	45	5	6	7	8	9	10	11																
34	18	19	20	21	22	23	24	46	12	13	14	15	16	17	18																
35	25	26	27	28	29	30	31	47	19	20	21	22	23	24	25																
36	1	2	3	4	5	6	7	48	26	27	28	29	30	1	2																
							Period 13							May																	
Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We	Wk	Th	Fr	Sa	Su	Mo	Tu	We								
								49	3	4	5	6	7	8	9																
								50	10	11	12	13	14	15	16																
								51	17	18	19	20	21	22	23																
								52	24	25	26	27	28	29	30																
									31																						

Table 2-7 (Cont.) Financial Quarter Session Variables

Variable Name	Description	Examples
SameQTDLastYearFinancial	The days in the same financial quarter of the previous financial year, up to and including the same day as <i>Yesterday</i> .	If a store opens Monday, May 28, and you run a report for <i>SameQTDLastYearFinancial</i> , the report runs for Thursday, February 8 to Saturday, May 27.

Table 2-7 (Cont.) Financial Quarter Session Variables

Variable Name	Description	Examples																																																								
		<table border="1"> <thead> <tr> <th colspan="7">Period 10</th> <th>Feb/Mar</th> </tr> <tr> <th>Wk</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> </tr> </thead> <tbody> <tr><td>37</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>38</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>39</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>40</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> </tbody> </table>	Period 10							Feb/Mar	Wk	We	Th	Fr	Sa	Su	Mo	Tu	37	8	9	10	11	12	13	14	38	15	16	17	18	19	20	21	39	22	23	24	25	26	27	28	40	1	2	3	4	5	6	7								
Period 10							Feb/Mar																																																			
Wk	We	Th	Fr	Sa	Su	Mo	Tu																																																			
37	8	9	10	11	12	13	14																																																			
38	15	16	17	18	19	20	21																																																			
39	22	23	24	25	26	27	28																																																			
40	1	2	3	4	5	6	7																																																			
		<table border="1"> <thead> <tr> <th colspan="7">Period 11</th> <th>Mar/Apr</th> </tr> <tr> <th>Wk</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> </tr> </thead> <tbody> <tr><td>41</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>42</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>43</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>44</td><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr> </tbody> </table>	Period 11							Mar/Apr	Wk	We	Th	Fr	Sa	Su	Mo	Tu	41	8	9	10	11	12	13	14	42	15	16	17	18	19	20	21	43	22	23	24	25	26	27	28	44	29	30	31	1	2	3	4								
Period 11							Mar/Apr																																																			
Wk	We	Th	Fr	Sa	Su	Mo	Tu																																																			
41	8	9	10	11	12	13	14																																																			
42	15	16	17	18	19	20	21																																																			
43	22	23	24	25	26	27	28																																																			
44	29	30	31	1	2	3	4																																																			
		<table border="1"> <thead> <tr> <th colspan="7">Period 12</th> <th>Apr/May</th> </tr> <tr> <th>Wk</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> </tr> </thead> <tbody> <tr><td>45</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>46</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>47</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>48</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td></tr> </tbody> </table>	Period 12							Apr/May	Wk	We	Th	Fr	Sa	Su	Mo	Tu	45	5	6	7	8	9	10	11	46	12	13	14	15	16	17	18	47	19	20	21	22	23	24	25	48	26	27	28	29	30	1	2								
Period 12							Apr/May																																																			
Wk	We	Th	Fr	Sa	Su	Mo	Tu																																																			
45	5	6	7	8	9	10	11																																																			
46	12	13	14	15	16	17	18																																																			
47	19	20	21	22	23	24	25																																																			
48	26	27	28	29	30	1	2																																																			
		<table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>We</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> </tr> </thead> <tbody> <tr><td>49</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr> <tr><td>50</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td></tr> <tr><td>51</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><td>52</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr> <tr><td></td><td>31</td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>	Period 13							May	Wk	We	Th	Fr	Sa	Su	Mo	Tu	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30		31						
Period 13							May																																																			
Wk	We	Th	Fr	Sa	Su	Mo	Tu																																																			
49	3	4	5	6	7	8	9																																																			
50	10	11	12	13	14	15	16																																																			
51	17	18	19	20	21	22	23																																																			
52	24	25	26	27	28	29	30																																																			
	31																																																									
		<table border="1"> <thead> <tr> <th colspan="7">Period 10</th> <th>Feb/Mar</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr><td>37</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>38</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>39</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>40</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td></tr> </tbody> </table>	Period 10							Feb/Mar	Wk	Th	Fr	Sa	Su	Mo	Tu	We	37	8	9	10	11	12	13	14	38	15	16	17	18	19	20	21	39	22	23	24	25	26	27	28	40	1	2	3	4	5	6	7								
Period 10							Feb/Mar																																																			
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																			
37	8	9	10	11	12	13	14																																																			
38	15	16	17	18	19	20	21																																																			
39	22	23	24	25	26	27	28																																																			
40	1	2	3	4	5	6	7																																																			
		<table border="1"> <thead> <tr> <th colspan="7">Period 11</th> <th>Mar/Apr</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr><td>41</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td></tr> <tr><td>42</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td></tr> <tr><td>43</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td></tr> <tr><td>44</td><td>29</td><td>30</td><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td></tr> </tbody> </table>	Period 11							Mar/Apr	Wk	Th	Fr	Sa	Su	Mo	Tu	We	41	8	9	10	11	12	13	14	42	15	16	17	18	19	20	21	43	22	23	24	25	26	27	28	44	29	30	31	1	2	3	4								
Period 11							Mar/Apr																																																			
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																			
41	8	9	10	11	12	13	14																																																			
42	15	16	17	18	19	20	21																																																			
43	22	23	24	25	26	27	28																																																			
44	29	30	31	1	2	3	4																																																			
		<table border="1"> <thead> <tr> <th colspan="7">Period 12</th> <th>Apr/May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr><td>45</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr> <tr><td>46</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td></tr> <tr><td>47</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td></tr> <tr><td>48</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td></tr> </tbody> </table>	Period 12							Apr/May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	45	5	6	7	8	9	10	11	46	12	13	14	15	16	17	18	47	19	20	21	22	23	24	25	48	26	27	28	29	30	1	2								
Period 12							Apr/May																																																			
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																			
45	5	6	7	8	9	10	11																																																			
46	12	13	14	15	16	17	18																																																			
47	19	20	21	22	23	24	25																																																			
48	26	27	28	29	30	1	2																																																			
		<table border="1"> <thead> <tr> <th colspan="7">Period 13</th> <th>May</th> </tr> <tr> <th>Wk</th> <th>Th</th> <th>Fr</th> <th>Sa</th> <th>Su</th> <th>Mo</th> <th>Tu</th> <th>We</th> </tr> </thead> <tbody> <tr><td>49</td><td>3</td><td>4</td><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td></tr> <tr><td>50</td><td>10</td><td>11</td><td>12</td><td>13</td><td>14</td><td>15</td><td>16</td></tr> <tr><td>51</td><td>17</td><td>18</td><td>19</td><td>20</td><td>21</td><td>22</td><td>23</td></tr> <tr><td>52</td><td>24</td><td>25</td><td>26</td><td>27</td><td>28</td><td>29</td><td>30</td></tr> <tr><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr> </tbody> </table>	Period 13							May	Wk	Th	Fr	Sa	Su	Mo	Tu	We	49	3	4	5	6	7	8	9	50	10	11	12	13	14	15	16	51	17	18	19	20	21	22	23	52	24	25	26	27	28	29	30								
Period 13							May																																																			
Wk	Th	Fr	Sa	Su	Mo	Tu	We																																																			
49	3	4	5	6	7	8	9																																																			
50	10	11	12	13	14	15	16																																																			
51	17	18	19	20	21	22	23																																																			
52	24	25	26	27	28	29	30																																																			

## Years

You can use the following variables to perform calculations based on a specific year.

**Table 2-8 Year Session Variables**

Variable Name	Description	Examples
CurrentYear	The days in the current calendar year up to and including <i>Yesterday</i> .	If a store opens Monday, May 28, and you run a report for <i>CurrentYear</i> , the report runs for Monday, January 1 to Sunday, May 27.
LastYearYTD	The days in the previous calendar year, up to and including the respective day for <i>Yesterday</i> .	If a store opens Monday, May 28, and you run a report for <i>LastYearYTD</i> , the report runs for Sunday, January 1 to Saturday, May 27 for the previous calendar year.
CurrentFinancialYear	The days in the current financial year up to and including <i>Yesterday</i> .	If a store opens Monday, May 28, and you run a report for <i>CurrentYear</i> , the report runs for Thursday, June 1 to Sunday, May 27.
LastYearYTDFinancial	The days in the previous financial year, up to and including the respective day for <i>Yesterday</i> .	If a store opens Monday, May 28, and you run a report for <i>LastYearYTD</i> , the report runs for Wednesday, June 1 to Saturday, May 27 for the previous financial year.

# 3

## Core Reports

Reporting and Analytics installs core reports, which are pre-defined reports that show information targeting specific business operations. The core reports do not include core reports from other regions such as EMEA, customized reports, and reports installed by other Enterprise Back Office products. You can configure the core reports to handle information from within a certain date range or from data that applies to a certain organizational level, such as a revenue center or a location.

For example, you can use the Daily Operations Summary report as part of your start-of-day process to review high-level operations data for the previous business day at a specific store. You can then run the report for all locations and compare the store to the whole enterprise.

## Running Reports

1. In the Reporting and Analytics side menu, click the link to go to the **More Reports** page. If you cannot find the link, contact your system administrator.
2. In the Reports list, click the report name, and then click the specific report.
3. Click **Run Report**.

## Modifying Reports

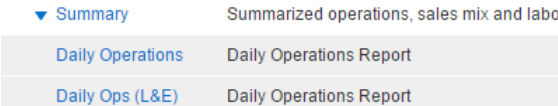
1. In the Reporting and Analytics side menu, click the link to go to the **More Reports** page. If you cannot find the link, contact your system administrator.
2. In the Reports list, click the report name, and then click the specific report.
3. On the **Modify Report** tab, modify the report as described in the following table:

Setting	Description
<b>Business Dates</b>	Select business dates for the report by performing one of the following: <ul style="list-style-type: none"><li>• Select the range of dates for the report from the drop-down list.</li><li>• Click <b>Business Dates</b> to open the calendar view.</li></ul> You can select dates in the calendar view using the following methods: <ul style="list-style-type: none"><li>• Click a single day.</li><li>• Click the month name to select all the days in the month.</li><li>• Click the day column header to select all those days in the month.</li><li>• Click the numbered week to select all the days in that week.</li><li>• Press and hold the <b>Ctrl</b> key to select multiple days.</li></ul>



Setting	Description
<b>Locations</b>	Select the locations for which the report returns data.
<b>Revenue Centers</b>	Select the revenue centers for which the report returns data.
<b>Order Types</b>	Select the order types for which the report returns data.

4. On the **Preferences** tab, specify how Reporting and Analytics saves reports as described in the following table:

Option	Description
<b>Save</b>	<p>When you select the report from the Reporting and Analytics home page side menu, the report runs with the settings you selected in step 3.</p> <p>For example, if you configure the Daily Operations report to search by the location <i>Maryland, USA</i> and then click <b>Save</b>, all users running the Daily Summary report generate a report for the location <i>Maryland, USA</i> unless they change the search settings.</p>
<b>Restore defaults</b>	Restores the factory defaults for the report.
<b>Save as</b>	<p>Saves the report with the settings you selected in step 3 as a custom report in Other Reports.</p> <p>For example, you can configure the Daily Operations report for a specific organization and save it as an alternate version of the Daily Operation report, as shown in the following image:</p>  <p>The screenshot shows a dropdown menu with the following items:</p> <ul style="list-style-type: none"> <li>▼ Summary (Selected) - Summarized operations, sales mix and labor</li> <li>Daily Operations - Daily Operations Report</li> <li>Daily Ops (L&amp;E) - Daily Operations Report</li> </ul>

5. On the **Favorite** tab, specify settings as described in the following table:

Setting	Description
<b>Set as Favorite</b>	<p>Makes the report easier to access. Reporting and Analytics adds a star next to the report name and adds it to the <b>Reports</b> section of the home page side menu.</p> <p><b>REPORTS</b></p> <p>★Daily Ops (L&amp;E)</p>
<b>Set as Home Report</b>	<p>You can configure your personal settings to open the report when you log in to Reporting and Analytics.</p> <p><a href="#">Configuring User Preferences</a> provides more information.</p>

---

Setting	Description
<b>Enable Auto Run</b>	Controls if the report runs after you click the report. If you turn off this setting, you have to click <b>Run Report</b> every time you want to run the report.

---

6. Click **Run Report**.

## Exporting Reports

You can export reports as file formats configured by administrators, such as PDF, Microsoft Excel, and comma-separated values.

1. Run a report or modify and then run a report.
2. Click the export format icon next to the **Favorites** tab.



3. Save the exported file.

When you save to a CSV file, Reporting and Analytics inserts comma delimiters with double-quotation text qualifiers. Some reports also contain the following mathematical symbols: + - =. The symbols can cause formatting issues when you open a CSV file in Microsoft Excel.

# 4

## Custom Reports in Microsoft Excel

iQuery is a Microsoft Excel plug-in that enables you to create reports using selected subjects and columns.

For example, if you want a start-of-day report that replaces the Operating Metrics section of the Daily Operations Summary report with information about the three best-selling items for that day and some labor performance and efficiency analysis, you can create a report with the fields you want to see. You can then save the custom report into Reporting and Analytics so you can launch the report from the sidebar.

### Installing iQuery

1. Close Microsoft Excel if it is open.
2. In the Reporting and Analytics side menu, click the link to go to the **iQuery Download** page. If you cannot find the link, contact your system administrator.
3. Click **Install MICROS iQuery - Office 2007+** and then save `iQuerySetup.exe` to a temporary location on your computer.
4. Double-click the `iQuerySetup.exe` file and then follow the prompts to install the software.
5. Validate the installation:
  - a. Open Microsoft Excel.
  - b. Locate the iQuery plug-in, and then open iQuery.

The location varies depending on the version of Microsoft Excel. For example, in Microsoft Excel 2013, access iQuery from the **ADD-INS** ribbon.
  - c. Log in to iQuery.

### Building a Custom Report in Microsoft Excel

1. Select a query subject.
2. Select the column data that appears in the spreadsheet when you run the query.

Use the up and down arrows to adjust the order of the columns in the spreadsheet. For example, if you move a column to the top of the list, that column is the first column in the spreadsheet.
3. To apply a mathematical operation to column data, select it from the **Operation** drop-down list.
4. Specify filters to refine query results:
  - a. Select a business date or date range.
  - b. Select locations.
  - c. Select revenue centers for the locations.

- d. Select other filters.
5. Define the order in which iQuery sorts the data.
6. Click **Preview** to verify that the query returns the correct results.

If the preview does not return results or returns too many rows, change query settings and then preview the query again.

7. Click **Run** to show the results in Microsoft Excel.
8. Save the query.

To save the query on your computer so you can run it at a later time from Microsoft Excel, click **Query**. iQuery does not save the business date because you change the date each time you run the query.

To save the query as a report, click **Report**. Users assigned to the role for accessing custom reports can run the report from Reporting and Analytics.

# 5

## Scheduled Reports

You can use Report Mail to schedule reports to run at a specified date and time, and to distribute the report by email to a user or role.

For example, you can configure Report Mail to generate and send an inventory report every morning so that you can check on re-stocks or pre-prepared food.

### Scheduling Reports for Email Distribution

1. In the Reporting and Analytics side menu, click the link to go to the **Report Mail Administration Menu** page. If you cannot find the link, contact your system administrator.
2. Click **Report Mail**, and then click **Add**.
3. On the **Content** tab, specify email content as described in the following table:

Setting	Description
<b>Type</b>	Select the report type.
<b>Report Selection</b>	Select the report. For long lists of reports, specify search criteria to locate the report.
<b>Preferences</b>	Specify delivery preferences. The report you select determines the preferences that appear. If you select multiple locations, Reporting and Analytics sends one report for each location. If you select <b>Consolidated</b> , Reporting and Analytics sends aggregate report data for all locations in one email. Reporting and Analytics sends each report in a separate email. If you select <b>Zip multiple files</b> , Reporting and Analytics sends one mail with a ZIP file containing the report files.

4. On the **Name** tab, specify email settings as described in the following table:

Setting	Description
<b>Name</b>	Type the name of the report email. The name identifies the report email in the Reporting and Analytics web application.
<b>Description</b>	Type a description of the report email. The description appears in the Reporting and Analytics web application.
<b>Subject</b>	Type a subject for the report email. The value appears in the subject line of the email sent to recipients.

Setting	Description
<b>Active</b>	Clear the option to deactivate the report email. Reporting and Analytics saves the report email settings but does not send report emails.
<b>Email When Error</b>	Select to notify the system administrator of report email errors.

5. On the **Recipients** tab, select the email recipients.

If you select a specific user, and you want to send the email to more users, select **Additional recipient(s) emails** and then type the email addresses.

6. On the **Frequency** tab, specify the intervals Reporting and Analytics uses to send report emails.

Depending on your system configuration, Reporting and Analytics can run scheduled reports and send report emails after a service outage. Reports scheduled to run more than once during the interval only run once with the last set of information. If the business date changed during the service outage, all reports are run as if they were scheduled to run on the current day. They do not run for the day they were scheduled. As a result, reports scheduled to show:

- Daily information, such as the Daily Operations report, show information for the previous business day instead of retrieving information from two days prior.
- Up-to-date information, such as the Today's Operations report, show information for the current business day instead of retrieving information for the previous business day.

# 6

## Guest Check Information

Oracle MICROS Reporting and Analytics enables you to retrieve high-level guest check information and transaction-level information from the system.

To retrieve high-level information, use Check Query to retrieve basic check information. For example, you can search for check totals less than \$10.00 for a date range from a specific location.

To retrieve transaction-level information, use Audit & Analysis to query the system. Audit & Analysis enables you to build custom queries by applying filters. You can use the query results to identify trends that require research, such as a high number of error corrections or voided transactions. The following table describes the Audit & Analysis queries you can create. Your role or user type determines the queries you can create.

**Table 6-1 Audit and Analysis Information Query**

Type	Description
Transaction Detail	Retrieves transaction-level data. For example, you can query transactions for specific menu item purchases at a location.
Transaction Summary	Retrieves summary-level data. For example, you can query transactions for a tender media type such as credit card purchases for a customer.
Non-Check Transaction	Retrieves data for non-check transactions. For example, you can query training transactions for workstations at a location.
Authorization	Retrieves data for transactions that require authorization. For example, you can query voided service charges from a round for a revenue center.

### Retrieving Information with Check Query

1. In the Reporting and Analytics side menu, click the link to go to the **Check Query** page. If you cannot find the link, contact your system administrator.
2. Specify the search criteria, and then click **Search**.

### Retrieving Transaction Information with Audit & Analysis

1. In the Reporting and Analytics side menu, click the link to go to the **Audit & Analysis** page. If you cannot find the link, contact your system administrator.
2. In the **Create New Queries** section, click the query type.

For example, click **Transaction Detail** to build a query based on specific transaction details such as menu items. Your role and user type determines the queries you can create.

3. Click **Locations** at the top of the page and then select the location.
4. Click **Business Dates** and then select dates:
  - a. To use a fiscal calendar, select **Financial**. Contact your system administrator to verify your organization uses a fiscal calendar.
  - b. To use a pre-defined date or date range, select it from the **Quick Select** drop-down list.
  - c. Select the year.
  - d. To select dates from the calendar grid:
    - Click a single day.
    - Click the month name to select all the days in the month.
    - Click the day column header to select all those days in the month.
    - Click the numbered week to select all the days in that week.
    - Press and hold the **Ctrl** key to select multiple days.
5. Click **Filters**, and then specify criteria to limit the query to a useful set of results, as described in the following table:

**Table 6-2 Audit and Analysis Filters**

Filter	Description
<b>Item Types</b>	Filters by discounts, menu items (Transaction Detail only), service charges (Transaction Detail only), and tender media associated with the check.
<b>General</b>	Filters by general transaction information. The query type determines the general criteria you can define.
<b>Workstation (Transaction Detail only)</b>	Filters results by checks generated from workstations at locations.
<b>Day Parts</b>	Filters by checks generated during parts of a day configured for your organization. Examples of day parts include breakfast, lunch, dinner, and late night. You can also select 15-minute intervals within an hour.
<b>Order Types</b>	Filters by order types configured for your organization.
<b>Revenue Centers</b>	Filters by revenue center. For example, you can filter on guest check transactions from the bar or restaurant.
<b>Customer (Transaction Summary only)</b>	Filters by customer information associated with transactions. For example, you can filter by the name on the credit card a customer used for the transaction.
<b>Employee</b>	Filters by employee information associated with transactions. For example, you can filter by all transactions for check employee Brian Smith.
<b>Tax (Transaction Summary only)</b>	Filter by tax information associated with transactions.



6. Click **Format** and define query output settings:
  - a. Select the output type.
  - b. To show location-specific names of menu items, tender and media, discounts, and service charges in the query, select **Use location names rather than master names**.

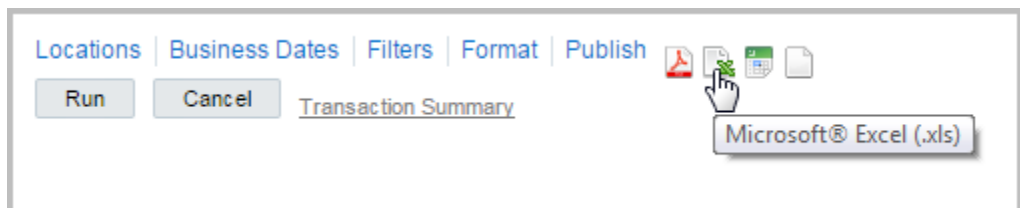
Clearing this option shows the names from the master definition table.
  - c. Select the columns that appear in the query and then define how the column data appears in the query.

For example, you can group data by revenue center in ascending order. To apply a mathematical operation, select the operation from the **Function** column.
7. Click **Run** to run the query.
8. Click **Publish** to save the query and make it available to other users:
  - a. Type a name and description for the query.
  - b. On the **Publish To** tab, specify if the members of a role or specific users can run the query.
  - c. On the **Prompted Filters** tab, select the filters that other users can set when running the published query.
  - d. Click **Save**.

The query appears in the **Public Queries** section on the Audit & Analysis page.

## Exporting Audit & Analysis Queries

1. Build and run an Audit & Analysis query or run a published query.
2. Click the export format icon as shown in the following example:



# 7

## Manager Communication

The Reporting and Analytics Manager Log is a location-based communication tool for managers. Use the log to add entries and notes for other managers at the location. For example, you are a morning manager at your restaurant and you notice you are low on eggs. Add a to-do log entry for the evening manager to order more eggs. After the evening manager orders the eggs, the evening manager can mark the to-do entry as complete. You can also use the Manager Log to add notes on daily operations.

### Configuring Manager Log Entry Categories

Add Manager Log categories so managers can use them to organize log entries at a location.

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Manager Log Config**.
2. Configure the name, column label, and description for each category, and click **Save**.

### Working with the Manager Log

1. In the Reporting and Analytics side menu, click the link to go to the **Manager Log** page. If you cannot find the link, contact your system administrator.
2. Select the location, and then click **View**.
3. To add an entry:
  - a. Click **Add Entry**.  
Your administrator adds the categories you can select when completing the form.
  - b. Complete the form, and then click **Add**.
4. To update an entry:
  - a. Select the entry from the list, and then click **Update Entry**.
  - b. Update the form, and then click **Update**.
5. To mark an entry as complete:
  - a. Select the entry from the list, and then click **Update Entry**.
  - b. Click **Mark Completed**.  
Reporting and Analytics removes the entry from the list of active entries.
6. To add a note:
  - a. Click **Add Note**.
  - b. Complete the form, and then click **Save**.
7. To update a note:
  - a. Select the note from the list, and then click **Update Note**.
  - b. Update the form, and then click **Save**.

8. To view the log history:
  - a. Click **View History**.
  - b. Select the date range and log details.
  - c. To define filters for searching log entries, specify the search criteria, and then click **Add**.
  - d. Click **View**.

## Searching the Manager Log

1. In the Reporting and Analytics side menu, click the link to go to the **Manager Log** page. If you cannot find the link, contact your system administrator.
2. Click **View History**, configure the search filters, and then click **View**.  
The Manager Log search does not include notes in the search results.
3. On the results page, click **Select Again** to perform another search.

## Adding an Entry to the Manager Log

1. In the Reporting and Analytics side menu, click the link to go to the **Manager Log** page. If you cannot find the link, contact your system administrator.
2. Click **Add Entry**, fill out the form, and click **Add**.  
Administrators can configure the list of **Categories**.

## Updating and Closing an Entry

1. In the Reporting and Analytics side menu, click the link to go to the **Manager Log** page. If you cannot find the link, contact your system administrator.
2. Click the entry you want to update, click **Update Entry**, and then make changes to the form.
3. Click **Update** to finalize the changes to the entry, or click **Mark Completed** to change the status of the entry to *Complete*.

## Adding a Note to the Manager Log

1. In the Reporting and Analytics side menu, click the link to go to the **Manager Log** page. If you cannot find the link, contact your system administrator.
2. Click **Add Note**, fill out the form, and then click **Save**.

# 8

## User Settings

You can configure the content and layout of myPage and change personal application settings.

### myPage

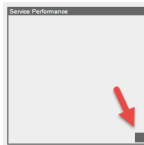
The **myPage** screen appears after you log in to Reporting and Analytics. You can perform the following configurations:

- Add or remove charts or reports to run upon login.
- Change the color scheme.
- Resize windows on the screen.

You can configure up to three myPage screens. Reporting and Analytics shows your first myPage screen after you log in.

### Configuring myPage Content

1. To add or remove content:
  - a. From the myPage menu, click **Content**.
  - b. Select or deselect the information you want show on myPage. The system administrator manages the content available in this list.
2. To move or resize content:
  - a. From the myPage menu, click **Layout** and then click **OK**.
  - b. Drag the center of the content to move it.
  - c. Drag the corner of the content to change its size.



### Configuring User Preferences

1. On the myPage you want to configure, click **Preferences**.
2. Select your **Language** and **Time Zone** regional settings.
3. Select your Reporting and Analytics color scheme From the **Style** drop-down list.
4. Select **Remember Report Selections** if you want to save your filter selections for each report.
5. For the **First login of the day** and **Subsequent logins**, you can configure whether to:

- a. Show the content configured for your myPage.
  - b. Show the report currently set as the Home Report. You cannot change the Home Report from the user preferences menu.
  - c. Show the dashboard set as the Home Dashboard.
6. Select the dashboard you want to set as the **Home Dashboard**.
  7. Click **Save**.

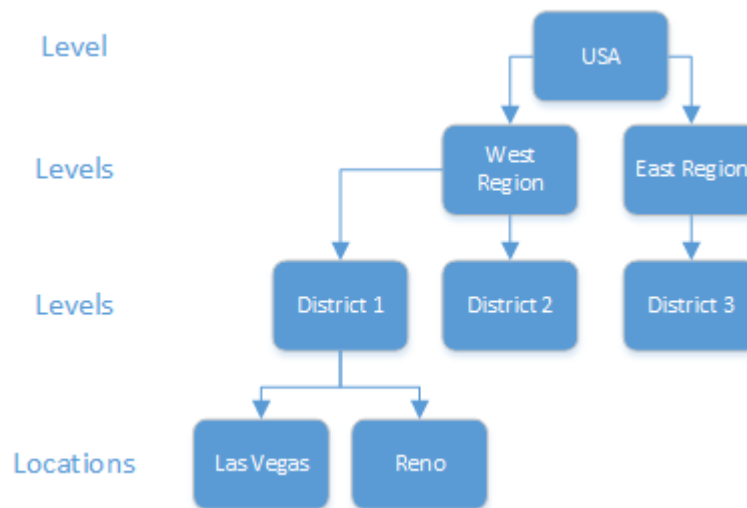
# 9

## Organizational Hierarchies

An organizational hierarchy provides the structure to an enterprise and its restaurants. The enterprise has only one organizational hierarchy. The hierarchy ensures totals from all locations are available for reports and controls how charts show information in Reporting and Analytics.

The hierarchy consists of levels and locations. A location is a restaurant. A level is a group of levels or a group of locations. You define the hierarchy by creating parent-child relationships between levels and locations. In the following figure of a sample organizational hierarchy, District 1 is the parent to the Las Vegas and Reno locations, and the West Region is the parent to District 1 and District 2.

**Figure 9-1 Example Organizational Hierarchy**



You can use the organizational hierarchy to determine user access to information in the system. Using the sample hierarchy as a model, you can create a District Manager role and then assign the role to Jen, the District Manager for District 1. Because of the system relationship between District 1 and the Las Vegas and Reno restaurants, Jen can see information for those restaurants only. She cannot see information for the restaurants related to the other districts.

## Revenue Centers

Revenue centers enable organizations to categorize revenue data by functions within a location. At a fast food restaurant, each register and the drive-thru are examples of cost centers. At a table service restaurant, the bar and dining area are examples of cost centers. If your organization is configured for revenue centers, Reporting and Analytics enables you to filter by revenue center when you modify and run standard reports. You can also filter by revenue center when you use iQuery to work with reporting data in Microsoft Excel.

## Adding Levels

1. In Reporting and Analytics, click **Portal**, click **Organizational Structure**, and then click **Levels**.
2. Click **Add**.
3. Type a level name.  
For example, type `District 1` for a district level or type `East` for a region level.
4. Type a level reference to indicate the level position within the organizational hierarchy.  
Use a value of 0 if the level is the highest corporate level in the organization. Use text or numbers when adding lower levels to the organization. For example, you can use 10 for one district and 20 for another district.
5. Select the financial calendar for the level.  
For example, if the organization uses a financial calendar based on a fiscal year, select the corresponding calendar.
6. Specify values for basic level settings on the form, such as address and postal code, and then click **Save**.

## Adding Locations

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Organizational Structure**, and then click **Locations**.
2. Click **Add**.
3. In the **Name** field, type a unique name for the location.  
For example, type `Columbia` for a restaurant location in Columbia, Maryland.
4. In the **Location Reference** field, type a value to indicate the location position within the organizational hierarchy.  
You can use a number to indicate the position. For example, if the location is the fourth location in a district level, you can use a value of 4. You can also use text to indicate the position. For example, you can use `East` for a location on the Eastern side of a district level.
5. If the location uses a financial calendar different than the parent level or the organization, select it from the **Financial Calendar** drop-down list.
6. Specify values for the remaining settings on the form and then click **Save**.

## Establishing Relationships Between Levels and Locations

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Organizational Structure**, and then click **Relationships**.
2. Select the highest level in the organization, and then click **Edit**.
3. Select **No Parent** from the **Parent Name** drop-down list.

Select **No Parent** if there is only one level in the organization.

4. Click **Save**.
5. Select a location and then click **Edit**.
6. Select the parent level for the location and then click **Save**.
7. Repeat steps 5 and 6 to establish relationships for the remaining locations.



# 10

## Users and Roles

You create user accounts to enable users to access information in Reporting and Analytics. When you add a user to the system, you assign the user to an organization level and a role. The role determines the level of access to information in the system. The following table describes the default roles in Reporting and Analytics:

Role	Description
System Administrator	Superuser account with access to every area of the enterprise. System administrators can perform any action and make any change in the system.
Enterprise Manager	Manager account with access to view data across the enterprise. Users assigned to this role cannot make changes in the system.
Store Manager	Manager account with access to restaurant-level reports and functions.

Business requirements determine if you create roles to support your organizational hierarchy. For example, your organizational hierarchy has a district level with three districts. Each district has three restaurants. You can create a District Manager role. When you add a District Manager as a user to the system, you assign the user to the district organization level and to the new District Manager role. Because of the district-restaurant relationship settings in Reporting and Analytics, District Managers can view information for only the restaurants in their districts.

### Creating Roles

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Roles**, and then click **Roles**.
2. Click **Add**.
3. Type a unique name to identify the role in the system.
4. Optionally configure role privileges as described in the following table:

Field	Description
Enterprise User	Role members can view data. Role members cannot change data.
Personalization	Role members can customize their myPage pages.
Password Change	Role members can change their passwords.
Guest	Role members have guest-level system access and cannot make changes.

Field	Description
Active	Indicates the role is active. You cannot delete roles from the system. If you no longer need a role, clear the <b>Active</b> check box to deactivate the role.
Market Segment	Select <b>TSR</b> if the role applies to table service restaurants. Select <b>QSR</b> if the role applies to quick service restaurants. Select <b>HTL</b> if the role applies to leisure and entertainment.
Sys Admin	Assigns system administrator rights to role members.
Role Access	Select the role access.
Power Role	Role members can configure a report to show more than 5,000 rows of data.
Enabled my2ndPage	Provides role members with a second myPage.
Enabled my3rdPage	Provides role members with a third myPage.
Info Distribution Administrator	Enables report mail for role members. Role members can schedule reports for email distribution.
Change Info Distribution Preferences	Role members can change report mail created by other users.
Can Be Assigned in HR Form	Members of the role can be used in HR forms.
Restrict Access to inMotion	Role members do not have permission to log in to the InMotion Mobile application.
Can Administer API Users	Role members have system rights to administer API user accounts. API user accounts enable you to integrate with Reporting and Analytics through APIs.
Revenue Center Type	Select the revenue center to which members of this role have access.

5. Click **Save**.

## Adding Users

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Users**, and then click **Users**.
2. Click **Add** and then specify basic user information on the form, such as the logon name and password.
3. Select the user role from the **Role** drop-down list.  
The user inherits the system privileges associated with the role.
4. Select the organization level from the **Org Level** drop-down list.  
The level you select determines the level of access to information in the system. For example, if you are adding a District Manager, the District Manager can access information for all the locations related to the level. If you are adding a store manager and you want to restrict access to a specific store, select the store from the drop-down list.

5. To use the account to integrate with Reporting and Analytics through APIs, select **API User**, and then click **Save**.

# 11

## End User Access to Content

Reporting and Analytics uses portlets to control user access to functionality and information in the system. End users access portlets from side menus on the Reporting and Analytics home page. A report is an example of a portlet. After you create the report portlet, you assign it to a role so users who belong to the role can access the report from the side menu.

### Creating Portlets

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Portlets**, and then click **Portlets**.
2. Click **Add**.
3. Configure the portlet as described in the following table:

Field	Description
Name	Type a unique name for the portlet. For example, when creating a report portlet, type the report name that appears in the Reporting and Analytics side menu.
Type	Select the portlet type. For example, select <b>Report</b> to create a report portlet.
URL	Type or select the portlet URL. The portlet type you select determines the values that appear in the <b>URL</b> drop-down list. For example, if you select <b>Report</b> from the <b>Type</b> drop-down list, system reports appear in the <b>URL</b> drop-down list.
Description	Type a description of the portlet.
myPage Title	Type the title for the portlet that appears on the user myPage.
Effective Dates	Select a start date for the portlet.
to	Select an end date for the portlet. The portlet expires on the date you select.

### Assigning Portlets to Roles

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Roles**, and then click **Portlets**.
2. Select the role, and then click **Configure**.
3. Click **Add**.
4. Configure settings as described in the following table:

Field	Description
Portlet	Select the portlet.
Side Menu Title	Select the side menu in which the portlet appears on the Reporting and Analytics home page.
Sort Order	Specify the order in which the portlet appears in the side menu. For example, if you type 1, the portlet is the first portlet listed in the side menu.
Hide	Hides the portlet in the side menu.
Enable myPage	Enables users to add the portlet when they customize their myPage.

5. Click **Save**.

## Assigning Side Menus to Roles

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Roles**, and then click **Side Menu**.
2. Select the role, and then click **Configure**.
3. Click **Add**.
4. Type a side menu title.
5. Type a side menu number.

The number determines the order in which the menu appears in the Reporting and Analytics navigation pane. For example, if you type 1, the menu is the first menu listed in the navigation pane on the Reporting and Analytics home page.

6. Click **Save**.

## Assigning Reports to Roles

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Reports**, and then click **Report Roles**.
2. Select the role, and then click **Select**.
3. Click **Add**.
4. Select the report, and then click **Save**.

## Outage Alerts

System administrators can configure Reporting and Analytics to send an email when communication with the hosting center fails. If there is no communication outage, Reporting and Analytics sends an email every two hours with the status `ALL OK`.

## Setting Outage Alert Recipients

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Alerts**, and then click **Outage Alerts**.

2. Enter up to four recipient email addresses and then click **Save**.

## Installing Remote Transfer Agent (RTA) at a Location

1. Make sure you know the your location ID and download password:
  - a. In Reporting and Analytics, click **Reports**, click **More Reports**, click **Admin Reports**, and then click **Download Report**.
  - b. Make a note of the `Restaurant ID` for your location.
  - c. Navigate to **.Connect Admin** or **RTA Admin** depending on your system configurations, select your location, and select **Display Password**.  
  
If **.Connect Admin** or **RTA Admin** do not populate a list of locations, you do not have the **Can View Download passwords** portlet permission enabled for your role.
  - d. Make a note of the **Download Password**.
2. Download and install the Remote Transfer Agent (RTA) for your location:
  - a. In Reporting and Analytics, click **Admin**, and then click **Store Download**.
  - b. Enter the Restaurant ID and the Download Password, and then click **Next**.  
  
If the installation fails, Reporting and Analytics shows the error log in a text editor.

# Financial Calendars and Day Parts

Reporting and Analytics manages the following methods for grouping time intervals for reporting and calculating data:

- **Calendar:** You can perform calculations based on standard calendar intervals, such as years, months, and weeks.
- **Financial Calendar:** You can configure financial calendars and financial years to perform configurations on fiscal intervals, such as fiscal years and fiscal quarters.
- **Day Parts:** You can divide workdays into day parts to perform calculations on different time intervals, such as breakfast periods, lunch periods, and dinner periods.

## Financial Calendars

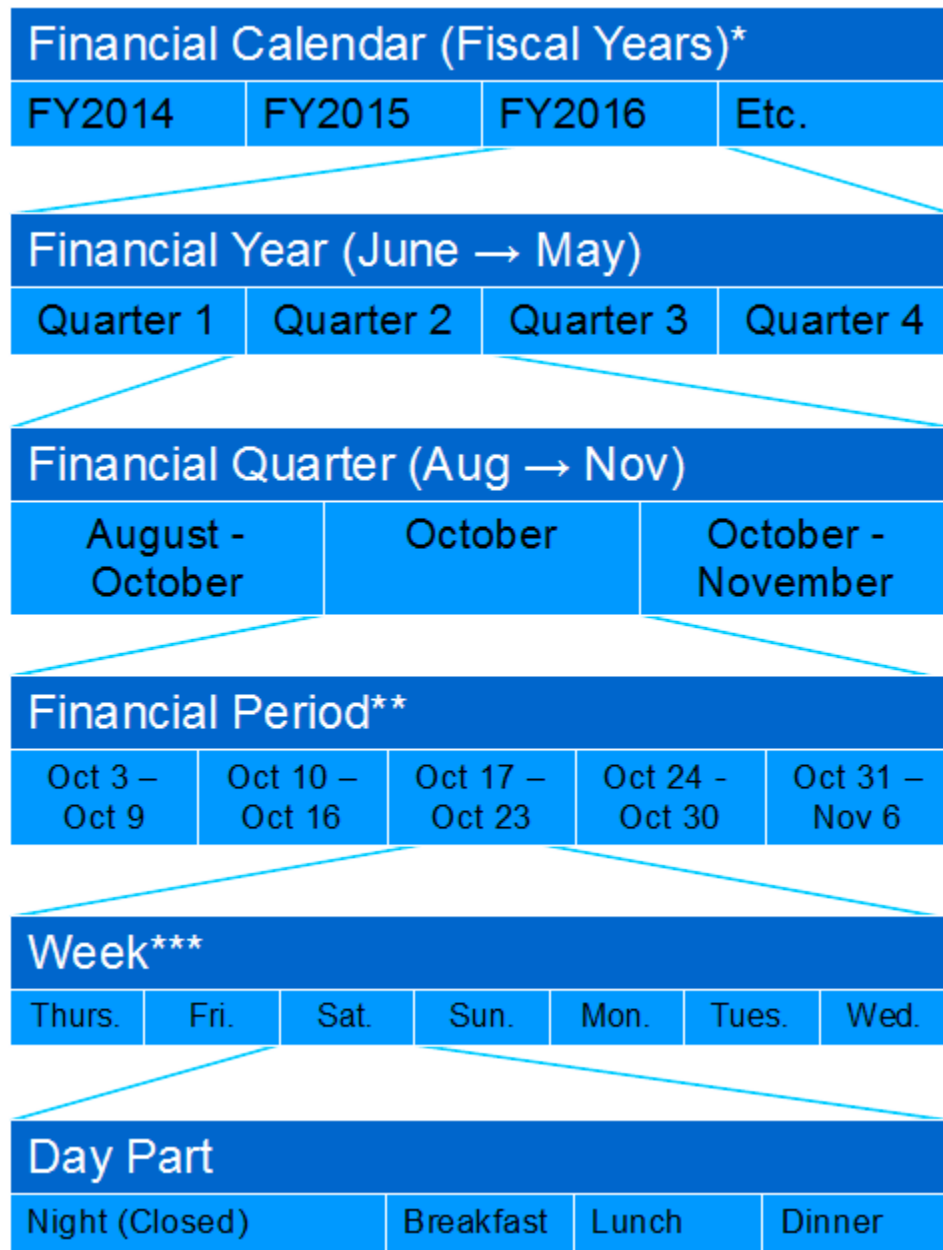
The sales information received by Reporting and Analytics from the Point-of-Sale (POS) application is processed by each business day, as configured by the POS End-of-Day (or End-of-Night) operations. For example, if a store is configured to perform End-of-Day operations every night even when the store is closed on weekends, the POS creates Saturday and Sunday as business days with no sales values, resulting in a seven-day week. If a store is configured to perform End-of-Day operations every week day, the POS only creates Monday to Friday, and the empty sales values from Saturday and Sunday are rolled into Monday, resulting in a five-day week.

The Reporting and Analytics financial calendar organizes the business dates within the following defined fiscal year components:

- The start and end of the fiscal year. Financial calendars also define how to handle the surplus day(s) at the end of the year.
- The starting day of each week.
- The start and end of each financial period.
- The start and end of each financial quarter.

By defining the components, the financial calendar ensures that users know what to expect when viewing calculations or requesting calculations based on certain intervals. For example, a financial period always consists of four or five weeks, depending on the accounting cycle used, and always includes the same number of each day of the week, resulting in a meaningful comparison of values across periods. A calendar month can differ in the number of weeks and days, and can have different numbers of each day of the week, making comparisons across months much less reliable and meaningful.

The following illustration provides an example of the component layers that comprise a financial calendar:



\* The financial calendar can be assigned to an organization level and location, with the location settings overriding the level settings. When using Analysis Reports, you must configure the system-generated Default Calendar.

\*\* The length of a financial period depends on the accounting cycle selected for the financial year. Financial periods are defined by the number of weeks since the start of the financial quarter, and do not correlate to any one specific calendar month. In this example, all three financial periods in the financial quarter include at least one day in October.

\*\*\* Each financial week begins with the day of the week of the first business day of the financial year. For example, if a financial year begins Thursday, June 1, every financial week begins on Thursday and ends on the following Wednesday.



# Accounting Cycles

Accounting cycles define the number of weeks in each financial period in each financial quarter. For example, the 4-4-5 accounting cycle means that in each quarter, the first financial period consists of the first four weeks, the second period consists of the next four weeks, and the third period consists if the next five weeks. This quarter then accounts for 13 weeks, and the four quarters account for 52 weeks, or the full calendar year.

You can configure a financial year to adhere to one of the following accounting cycles:

**Table 12-1 4-4-5 and 5-4-4 Accounting Cycle Examples**

4-4-5													5-4-4																		
Q3 FY2016						Q4 FY2016						Q3 FY2016						Q4 FY2016													
Period 7 Nov/Dec						Period 10 Mar						Period 7 Nov/Jan						Period 10 Mar/Apr													
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
27	30	1	2	3	4	5	6	40	1	2	3	4	5	6	7	27	30	1	2	3	4	5	6	40	1	2	3	4	5	6	7
28	7	8	9	10	11	12	13	41	8	9	10	11	12	13	14	28	7	8	9	10	11	12	13	41	8	9	10	11	12	13	14
29	14	15	16	17	18	19	20	42	15	16	17	18	19	20	21	29	14	15	16	17	18	19	20	42	15	16	17	18	19	20	21
30	21	22	23	24	25	26	27	43	22	23	24	25	26	27	28	30	21	22	23	24	25	26	27	43	22	23	24	25	26	27	28
Period 8 Dec/Jan						Period 11 Mar/Apr						Period 8 Jan						Period 11 Apr/May													
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
31	28	29	30	31	1	2	3	44	29	30	31	1	2	3	4	31	28	29	30	31	1	2	3	44	29	30	31	1	2	3	4
32	4	5	6	7	8	9	10	45	5	6	7	8	9	10	11	32	4	5	6	7	8	9	10	45	5	6	7	8	9	10	11
33	11	12	13	14	15	16	17	46	12	13	14	15	16	17	18	33	11	12	13	14	15	16	17	46	12	13	14	15	16	17	18
34	18	19	20	21	22	23	24	47	19	20	21	22	23	24	25	34	18	19	20	21	22	23	24	47	19	20	21	22	23	24	25
Period 9 Jan/Feb						Period 12 Apr/May						Period 9 Feb						Period 12 May													
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
35	25	26	27	28	29	30	31	48	26	27	28	29	30	1	2	35	25	26	27	28	29	30	31	48	26	27	28	29	30	1	2
36	1	2	3	4	5	6	7	49	3	4	5	6	7	8	9	36	1	2	3	4	5	6	7	49	3	4	5	6	7	8	9
37	8	9	10	11	12	13	14	50	10	11	12	13	14	15	16	37	8	9	10	11	12	13	14	50	10	11	12	13	14	15	16
38	15	16	17	18	19	20	21	51	17	18	19	20	21	22	23	38	15	16	17	18	19	20	21	51	17	18	19	20	21	22	23
39	22	23	24	25	26	27	28	52	24	25	26	27	28	29	30	39	22	23	24	25	26	27	28	52	24	25	26	27	28	29	30
								52	31															52	31						

**Table 12-2 4-5-4 and 4-4-4 Accounting Cycle Examples**

**4-5-4**

Q3 FY2016								Q4 FY2016							
Period 7							Nov/Dec	Period 10							Mar
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
27	30	1	2	3	4	5	6	40	1	2	3	4	5	6	7
28	7	8	9	10	11	12	13	41	8	9	10	11	12	13	14
29	14	15	16	17	18	19	20	42	15	16	17	18	19	20	21
30	21	22	23	24	25	26	27	43	22	23	24	25	26	27	28
Period 8							Dec/Jan	Period 11							Mar/May
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
31	28	29	30	31	1	2	3	44	29	30	31	1	2	3	4
32	4	5	6	7	8	9	10	45	5	6	7	8	9	10	11
33	11	12	13	14	15	16	17	46	12	13	14	15	16	17	18
34	18	19	20	21	22	23	24	47	19	20	21	22	23	24	25
35	25	26	27	28	29	30	31	48	26	27	28	29	30	1	2
Period 9							Feb	Period 12							May
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
36	1	2	3	4	5	6	7	49	3	4	5	6	7	8	9
37	8	9	10	11	12	13	14	50	10	11	12	13	14	15	16
38	15	16	17	18	19	20	21	51	17	18	19	20	21	22	23
39	22	23	24	25	26	27	28	52	24	25	26	27	28	29	30
								52	31						

**4-4-4**

Q3 FY2016								Q4 FY2016							
Period 7							Nov/Dec	Period 10							Feb/Mar
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
25	16	17	18	19	20	21	22	37	8	9	10	11	12	13	14
26	23	24	25	26	27	28	29	38	15	16	17	18	19	20	21
27	30	1	2	3	4	5	6	39	22	23	24	25	26	27	28
28	7	8	9	10	11	12	13	40	1	2	3	4	5	6	7
Period 8							Dec/Jan	Period 11							Mar/Apr
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
29	14	15	16	17	18	19	20	41	8	9	10	11	12	13	14
30	21	22	23	24	25	26	27	42	15	16	17	18	19	20	21
31	28	29	30	31	1	2	3	43	22	23	24	25	26	27	28
32	4	5	6	7	8	9	10	44	29	30	31	1	2	3	4
Period 9							Jan/Feb	Period 12							Apr/May
Wk	We	Th	Fr	Sa	Su	Mo	Tu	Wk	We	Th	Fr	Sa	Su	Mo	Tu
33	11	12	13	14	15	16	17	45	5	6	7	8	9	10	11
34	18	19	20	21	22	23	24	46	12	13	14	15	16	17	18
35	25	26	27	28	29	30	31	47	19	20	21	22	23	24	25
36	1	2	3	4	5	6	7	48	26	27	28	29	30	1	2
Period 13							May								
Wk	We	Th	Fr	Sa	Su	Mo	Tu								
49	3	4	5	6	7	8	9								
50	10	11	12	13	14	15	16								
51	17	18	19	20	21	22	23								
52	24	25	26	27	28	29	30								
52	31														

The 4-4-4 accounting cycle adds an additional financial period (Period 13) to account for the remaining weeks.

## Last Week of the Financial Year

Depending on the number of days in a financial week generated by your Point-of-Sale End-of-Day operations, the last week of the year can consist of more than seven days. You can configure Reporting and Analytics to handle the extra days in one of two ways:

- **Add extra days to the last week:** By default, Reporting and Analytics creates an extended week with more than seven days.

51	17	18	19	20	21	22	23
52	24	25	26	27	28	29	30
	31						

- **Create a new financial week with the extra days:** You can select this option to create an additional week containing the additional days.

51	17	18	19	20	21	22	23
52	24	25	26	27	28	29	30
53	31						

## Creating a Financial Calendar

1. Create the Financial Calendar for your organization or location:
  - a. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and then click **Financial Calendars**.
  - b. Click **Add**, enter a **Name** for the calendar, and then click **Save**.
2. Add a financial year to the calendar:
  - a. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and then click **Financial Periods**.
  - b. Select the financial calendar and click **Configure**.
  - c. Click **Add Year Automatically** to use the creation wizard, or click **Add Year Manually** to manually enter all financial year.
3. Set the **Financial Calendar** field for locations and levels in the organization.

Locations inherit the financial calendar setting for the level to which they belong. You can set an overriding financial calendar directly for the location.

## Creating a Financial Year with the Automated Wizard

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and then click **Financial Period**.
2. Select the calendar for which you want to define the financial periods and then click **Configure**.
3. Click **Add Year Automatically** and then fill out the form as described in the following table:

Field	Description
Year Name	Enter a name for the financial year.
Year Number	Enter an order in the list. The financial calendar lists the financial years in an order based on this field.
Year Start Date	Enter or select the first day for the year.
Year End Date	Enter or select the last day for the year.
Accounting Cycle	Select the accounting cycle for the year: <ul style="list-style-type: none"> <li>• 4/4/5</li> <li>• 5/4/4</li> <li>• 4/5/4</li> <li>• 4/4/4</li> </ul>

4. If there are more than seven days in the last week of the year, you can select **Add extra days to the last week** to combine the extra days into the week, or you can select **Create a new financial week with the extra days** to create a new reporting week.

If you do not select either option, the system implements **Add extra days to the last week**.

## Creating a Financial Year Manually

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and then click **Financial Period**.
2. Select the calendar for which you want to define the financial periods and then click **Configure**.
3. Click **Add Year Manually**, and then enter a **Name** and **Number** for the year.
4. Click **Add New Period** to add a new row to the table of periods, then enter a name for the period, the ordering number for the period, and the fiscal quarter to which the period belongs.
5. Click **Add New Period** to add a new row to the table of periods, then enter a name for the period, the ordering number for the period, and the fiscal quarter to which the period belongs.

## Creating Day Parts

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Day Part**.
2. Click **Add** and fill out the form as described in the following table:

Field	Description
Name	Enter a name for the day part. Enterprise Back Office shows this name in day part reports.
Beginning Fixed Period	Select the start time for the day part. The system administrator can configure the interval for the drop-down list.
Ending Fixed Period	Enter the end time for the day part while making sure that the time does not overlap with the start time.
Report Display Order	Enter the order in which reports list the day part.
Apply To	Select or deselect the days of week for which this day part applies. You can click <b>Clear Days</b> to deselect all days.

3. Verify that the day part does not overlap other day parts.
4. Verify that the day parts cover all hours of a business week. If there are untouched hours, the Day Part page shows the following message:

Warning: The day parts you've setup do not cover all fixed periods and days of the week. Please review documentation for additional details.

## Overriding Day Parts

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Day Part Overrides**.

2. Click **Add** and fill out the form as described in the following table:

<b>Field</b>	<b>Description</b>
Override Day Part	Select the day part you want to override.
Location	Select the location for the override.
Revenue Center	Select the revenue center for the override.
Beginning Fixed Period	Select the start time for the day part. The system administrator can configure the interval for the drop-down list.
Ending Fixed Period	Enter the end time for the day part while making sure that the time does not overlap with the start time.
Report Display Order	Enter the order in which reports list the day part.
Apply To	Select or deselect the days of week for which this day part applies. You can click <b>Clear Days</b> to deselect all days.

# 13

## Currency and Exchange Rate

You can enter as many types of **currency** as necessary by the organization to control and examine financial data. If your organization uses multiple currencies, you need to create **exchange rates**.

Follow the steps in the order they appear below:

### Enabling Currency Configuration

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Enterprise Options**.
2. Select **Enable Common Currency**.
3. Click **Save**.

### Adding a Currency Type

1. Make sure you enabled common currency.
2. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Currency**.
3. Click **Add**.
4. Fill out the form as described in the following table:

Field	Description
Currency Name	Enter the name of the currency type. For example, <code>American Dollar</code> .
Abbreviation	Optionally, enter an abbreviation for the currency. For example, <code>USD</code> .
Multiply	Select to multiply the currency against the base currency.
Round To	Enter the number of decimal places for rounding in the 0.0 format. For example, <code>0.00</code> to round to two decimal places and <code>0.0</code> to round to one decimal place.

5. Click **Save**.

### Setting the Common Currency

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Enterprise Options**.

2. Select the currency type from the **Common Currency** drop-down list.  
This is the currency to which other currencies are exchanged and converted.
3. Click **Save**.

## Setting a Location's Currency

1. In Reporting and Analytics, click **Admin**, click **Portal**, click **Organizational Structure**, and then click **Locations**.
2. Select the location and then click **Edit**.
3. In the **Currency** field, select the currency for this location.
4. Click **Save**.

## Adding and Updating Exchange Rates

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Exchange Rate**.
2. Search for or select a currency and click **Configure**.
3. On the Exchange Rate Administration page, click **Add**, or select an existing exchange rate and then click **Edit**.
4. Fill out the form as described in the following table:

Field	Description
Business Date	Enter or select the date on which this exchange rate goes into effect.
Business Date	Optionally, enter or select the date on which this exchange rate stops being used for calculations.
Exchange Rate	Enter the multiplier relative to the base currency.

5. Click **Save**.

# 14

## Reason Codes

Point-of-Sale operations such as voids, returns, time card adjustments, pay rate changes, and leaves of absence typically require the manager or employee to enter a reason. You can use **Enterprise Reason Codes** to define and configure types of reasons and to define the available predefined reasons that managers and employees can select.

### Creating Reason Codes

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Enterprise Reason Codes**.
2. Select the action and then click **Select**. For example, you can select **Time Card Adjustments** to configure the list of reasons available to managers when they justify changes to a time card.
3. Click **Add**, or select an existing reason and click **Edit** to open the reason configuration form.
4. Enter the reason in the **Reason Code** field.
5. To set the code as the default for the action, select **Default** and then click **Save**.



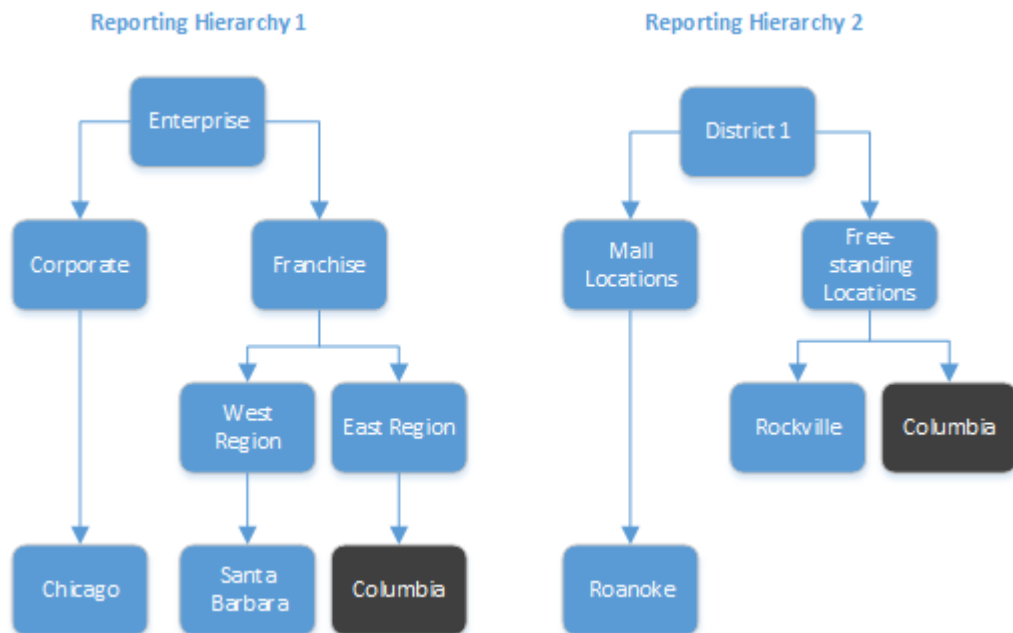
# 15

## Reporting Hierarchies

A reporting hierarchy provides the reporting structure to an enterprise and its restaurants. Reporting hierarchies enable you to group restaurant locations for collecting and assembling report totals. A reporting hierarchy is similar to an organizational hierarchy because it consists of levels and locations in parent-child relationships. Depending on your reporting requirements, you can create variations of reporting hierarchies that use the same locations.

The following figure shows examples of reporting hierarchies that use the same Columbia restaurant location:

**Figure 15-1 Example Reporting Hierarchy**



## Creating Reporting Hierarchies

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Reporting Hierarchies**, and click **Hierarchies**.
2. Click **Add**.
3. Type a hierarchy name (for example, `District 1`).
4. Add levels to the hierarchy:
  - a. Click **Admin**, click **Warehouse**, click **Reporting Hierarchies**, and click **Levels**.
  - b. Click **Add**.

- c. Type a reporting level name (for example, *Free-standing*).
  - d. Click **Save**.
  - e. Repeat these substeps to add more levels.
5. Establish relationships between levels:
  - a. Click **Admin**, click **Warehouse**, click **Reporting Hierarchies**, and click **Relationships**.
  - b. Select the reporting hierarchy name and then click **Select**.
  - c. Click **Assign Level**.
  - d. Select the level (for example, **Free-standing**).
  - e. Select the parent level. If the level you are assigning is the first level, select **No Parent** from the **Parent Level Name** drop-down list.
  - f. Click **Assign Level**.
  - g. Repeat these substeps to assign more levels.
6. Establish relationships between levels and locations:
  - a. Click **Assign Location**.
  - b. Select the location (for example, **Columbia**).
  - c. Select the parent level for the location (for example, **Free-standing**).
  - d. Click **Assign Location**.
  - e. Repeat these substeps to establish remaining level-location relationships.

# 16

## Item Alignment

When your organization does not use an enterprise management module to control data entry, different locations can enter the same item with slight variances. Item alignment allows you to define the master entry under which all of the same item posts and calculates.

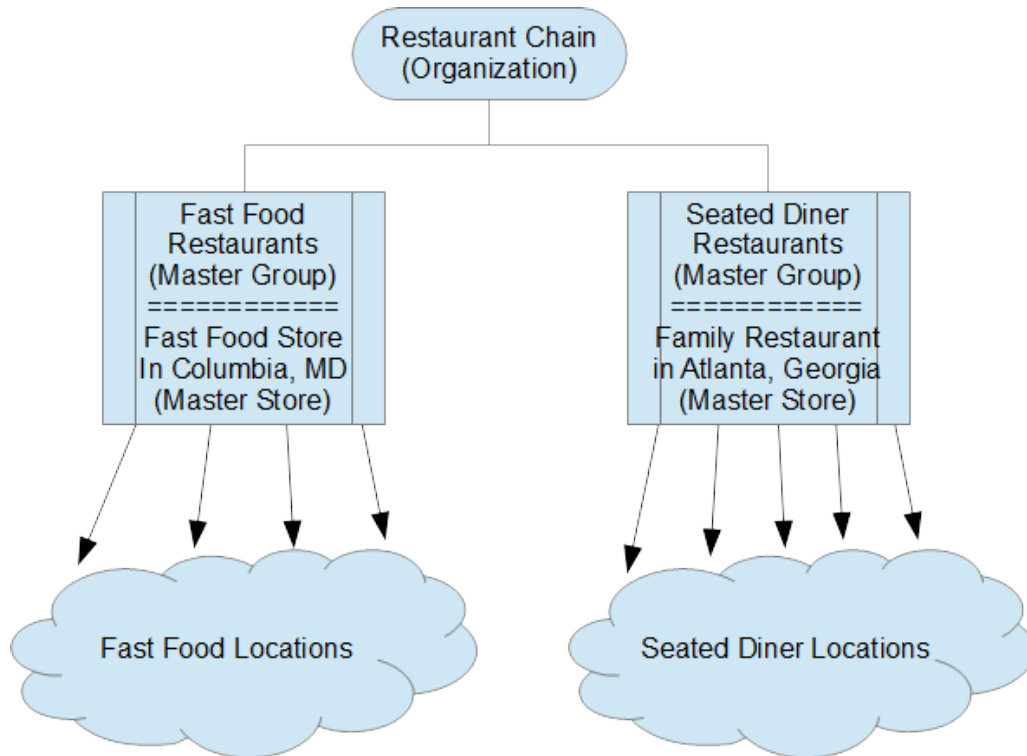
Item Alignment consists of the following components:

- **Master Groups:** Store groupings for which you can specify master items and assign locations. Each Master Group must have one Master Store.
- **Master Stores:** Assigned locations that define the default master items to which other locations in the same Master Group align.
- **Master Items:** The parent item instance under which items post.
- **Alias Items:** The alias name for aligned items to consolidate under in reports.

### Master Groups and Master Stores

You can configure Master Groups to create groups of stores with separate item alignment rules, and assign a Master Store to each group. The following figure provides an example of an organization that defines two master groups to separate item alignment between fast food restaurants and seated diner restaurants.

Figure 16-1 Example Master Group and Master Store



Reporting and Analytics enforces the following rules and guidelines for Master Groups and Master Stores:

- Only one location can be designated as the Master Store for an item. For example, if you set Locate 15 as the Master Store for Service Charges, you cannot assign another location to be the Master Store for Service Charges.
- A location can only be assigned to one Master Group for an item. For example, Location 15 can only be assigned one Master Group for Taxes, one Master Group for Service Charges, and so on.

You can assign more than one Master Group to a menu item, but the POS Reference Number for the menu item must be contiguous and must not overlap.

## Alignment Rules

Alignment Rules define the menu item alignment processes by:

- Controlling how unaligned data items are matched.
- Enabling standard food costs.
- Enabling menu item aliasing.
- Setting the start and end times for charts.
- Defining the default methods for identifying new menu items.
- Defining how new menu items are matched to existing values.

Alignment rules do not guarantee that all new menu items are aligned to existing menu items. You can use the rules to increase the likelihood of successfully automated matches. Administrators should continue to perform routine checks of unaligned items and review menu item alignment to ensure accuracy.

## Configuring a Master Group

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and then click **Master Groups**.
2. Click **Add**, or select a Master Group and then click **Edit**.
3. Enter a name, suffix, and comment for the Master Group, and then click **Save**.

Reporting and Analytics appends the suffix to items aligned with the Master Store. This allows you to immediately identify the alignment status of items when performing manual alignment. For example, if you configure the `Front of House` Master Group with the `FOH` suffix, and then set a Master Item for `COCKTAIL`, Reporting and Analytics appends the suffix and shows the item as `COCKTAIL FOH`.

## Assigning a Location as a Master Store

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and then click **Master Groups**.
2. Select a Master Group, and then click **Assign Store Master**.
3. Click **Add**, and then select a **Location** from the drop-down list.
4. Select the item types or groups to designate the Master Items. You cannot designate an item type or group as a Master Item if it has been set for another Master Store in the same Master Group.
5. You can select **Assign as location** if you deactivate the location as a Master Store.
6. Click **Save**.

## Assigning Locations to the Master Group

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and then click **Master Groups**.
2. Select a Master Group, and then click **Assign Location**.
3. Click **Add**, and then select a **Location** from the drop-down list.
4. Select the item types or groups to align to the Master Items in this Master Group.
5. Click **Save**.

## Creating Alignment Rules

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Alignment Rules**.
2. Select one of the following alignment methods from the **Method Item Alignment Based On** drop-down list:
  - **POS Number**

- **Name 1**
  - **Name 2**
  - **Name 1 and POS Number**
3. Select one of the following general alignment methods from the **General Alignment Type** drop-down list:
    - **POS Item Number Only**
    - **POS Name Only**
    - **POS Item Number and Name**
  4. Select one of the following back-of-house alignment methods from the **BOH Align Type** drop-down list:
    - **POS Item Number Only**
    - **POS Name Only**
    - **POS Item Number and Name**
  5. Enter the start and end time for all charts in the portal using the 24-hour format.
  6. Enter the default food cost percentage for when a percentage is not included in the Master table or the data posted from the POS.
  7. Select how the system handles new menu items from the **Menu Item Name Change** drop-down list:
    - **Replace an Old Name**
    - **Create a New Menu Item**
  8. Enter the **Number of Attempts** to be made to align each menu item.
  9. Select **Enable Menu Item Aliasing** to allow one menu item to link to multiple possible names.
  10. Select **Enable Other Table Aliasing** to allow unaligned menu items to alias with items found in other database tables.

## Manually Aligning Items

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Alignment**, and click the type of database item.

If the organization is configured to match family group or major group, you must perform alignment in the order of Family Group, Major Group, and then Menu Items.

2. Select the Master Group and the Location, and then click **Submit**.

In the alignment window, you can:

- Hold the Shift key to select multiple items.
- Click **Options** and filter the list of master items.
- Click **Options** and configure the columns shown in the Unaligned Items and Aligned Items tabs.
- Click **Run Alignment** to run the alignment process immediately.

3. To align an item:

- a. Click the master item from the **Master Items** list.
  - b. Click the unaligned item from the **Unaligned Items** tab, and then click **Align**.
4. To change item alignment:
  - a. Click the master item from the **Master Items** list.
  - b. Click the item from the **Aligned Items** tab, and then click **Transfer**.
  - c. In the **Select destination master item** window, click the destination master item, and then click **OK**.
5. To unalign an item:
  - a. Click the master item from the **Master Items** list.
  - b. Click the item from the **Aligned Items** tab, and then click **Unalign**.
6. To merge master items:
  - a. Click the master items from the **Master Items** list, and then click **Merge**.
  - b. In the **Select master item** dialog box, click the master item you want to keep, and then click **OK**.
7. To designate an unaligned item as a new master item:
  - a. Click an item from the **Unaligned Items** tab and then click **Create Master**.
  - b. Fill out the **Create Master** form, and then click **OK**.
8. To configure alignment rules:
  - a. Click **Modify Rules**.
  - b. Fill out the form, and then click **Create**.

You can enter the characters to remove or ignore during the alignment process, such as slashes and apostrophes.

# Category Groups

**Category Groups** organize database items to control the scope of reports. For example, Reporting and Analytics considers the Major menu item groups and Family menu item groups used in many Point-of-Sale applications as category groups and allows users to run reports against one or both groups. Reporting and Analytics does not limit the number of category groups that you can use and allows you to organize the category groups in **Category Group Hierarchies** so you can run reports against multiple category groups.

For example, one location combines beer, wine, and liquor into the `Alcohol` group. Another location has a combined group named `Beverages` but also organizes each beverage by type, so they have a `Beer` group consisting of domestic, import, and draft. You can use category groups to create a unified set of groups and hierarchies to consolidate information from different systems and produce accurate reports.

## Creating Category Groups

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Category Groups**, and click **Category Groups**.
2. Enter a name for the category group and then click **Save**.

## Creating Category Group Hierarchies

1. To create a category group hierarchy:
  - a. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Category Groups**, and click **Hierarchies**.
  - b. Click **Add** and then enter a name for the hierarchy.
  - c. Select the category type from the drop-down list and then click **Save**.
2. To add category groups to the hierarchy and to configure parent-child relationships:
  - a. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Category Groups**, and click **Relationships**.
  - b. Select the hierarchy and then click **Select**.
  - c. To add a category group to the hierarchy, click **Assign Group**, select the group and the parent, and click **Save**.
  - d. To change the parent-child relationship of a group, select the child group, click **Edit**, change the parent group, and click **Save**.



# 18

## Cost Tiers

A **cost tier** is a saved set of menu items typically associated with a vendor or source. For example, you can create a cost tier for four different produce suppliers and then assign the menu item `Lettuce` to each cost tier.

### Creating Cost Tiers

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Cost Tier**.
2. Click **Add**, fill out the form, and click **Save**.
3. You can enter an external database reference link for custom development.

### Assigning Menu Items to Cost Tiers

1. In Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Menu Item Cost Tier**.
2. Select the Point-of-Sale **Major Group**, **Family Group**, or an applicable Reporting and Analytics **Category Group**.
3. Select the group or category from the drop-down list.
4. Select the menu item and then click **Select**.
5. Click **Add**, select the **Cost Tier** from the drop-down list, fill out the form, and click **Save**.

# 19

## Legacy Reports

Due to the implementation of Oracle Business Intelligence Enterprise Edition (OBIEE), Reporting and Analytics deprecated support for the legacy Interactive Reports and Ad Hoc Reports. If you are using Reporting and Analytics Cloud Services, you can use a workaround to access a separate instance of Reporting and Analytics, allowing you to create and run Interactive Reports and to run existing Ad Hoc reports.

### Converting Interactive Reports to Analysis Reports

1. In Reporting and Analytics, click **Reports**, and then click **Interactive Reporting**.
2. Find the report you want to convert, and then click **Show**.
3. Click the PDF icon to save the configuration information.
4. Click **OBIEE Link** and create an Analysis Report by matching the **Subject Area** configuration element to the Analysis Report subject area as described in the following mapping table:

**Table 19-1 Subject Area Mapping**

OBI Subject Area	Interactive Reports Subject Area
Operations	Daily Operations Fixed Period Operations Employee Operations Daily Order Types Fixed Period Order Times
Menu Items	Daily Menu Items Fixed Period Menu Items Employee Menu Items
Discounts	Daily Menu Discounts Fixed Period Discounts Employee Menu Discounts
Service Charges	Daily Service Charges Fixed Period Service Charges Employee Service Charges
Taxes	Daily Service Taxes Fixed Period Service Taxes
Tenders	Daily Menu Tenders Fixed Period Tenders Employee Tenders
Guest Check Headers	N/A
Guest Check Line Items	N/A

**Table 19-1 (Cont.) Subject Area Mapping**

OBI Subject Area	Interactive Reports Subject Area
Today's Check Headers	N/A

5. To add columns to the report:
  - a. On the **Criteria** tab, find the columns in the **Subject Area** pane that corresponds to the **Columns** configuration element.
  - b. Drag and drop the columns to the **Selected Columns** pane.
  - c. To configure the sorting order for a column, click the configure icon, select **Sort**, and then select the sorting method.
  - d. To configure filters for a column, click the configure icon, select **Filter**, and then configure the filter based on the **Parameters** configuration element.
6. To add time-based columns to the report:
  - a. On the **Criteria** tab, find the columns in the **Subject Area** pane that corresponds to the **Columns** configuration element.
  - b. Drag and drop the columns to the **Selected Columns** pane.
  - c. To configure the sorting order for a column, click the configure icon, select **Sort**, and then select the sorting method.
  - d. To configure filters for a column, click the configure icon, select **Filter**, and then configure the filter based on the **Parameters** configuration element.
7. To configure the aggregation rule for a column when performing a direct database request for values:
  - a. On the **Results** tab, click **Edit View** to open the **Layout** pane.
  - b. In the **Columns and Measures** section, click the configure icon for a column, select **Aggregation Rule**, and then select the aggregation rule that corresponds to the **Column Aggregation** configuration element.
8. Click **Save As** to save the report, and enter a new report name or use the value in the **Report Name** configuration element. You can then publish the report.
9. Perform the following steps to update the migration status of the report. The status is for administrative information only and does not impact operations.
  - a. In Reporting and Analytics, click **Reports**, and then click **Interactive Reporting**.
  - b. Find the report you want to convert, and then click the **Migration Status**.
  - c. Select the new migration status for the report, and then click **Save**.

## Converting Ad Hoc Reports to Analysis Reports

1. In Reporting and Analytics, click **Reports**, and then click **Ad Hoc Report**.
2. Find the report you want to convert, and then click **Show**.
3. Click the PDF icon to save the configuration information.
4. Click **OBIEE Link** and create an Analysis Report by matching the **Subject Area** configuration element to the Analysis Report subject area as described in the following mapping table:

**Table 19-2 Subject Area Mapping**

OBI Subject Area	Ad Hoc Reports Subject Area
Operations	Operations
Menu Items	Menu Items
Discounts	Discounts
Service Charges	Service Charges
Taxes	Taxes
Tenders	Tenders
Guest Check Headers	Checks
Guest Check Line Items	Checks
Today's Check Headers	Checks

5. To add columns to the report:
  - a. On the **Criteria** tab, find the columns in the **Subject Area** pane that corresponds to the **Columns** and the **Group Number** configuration elements.
  - b. Drag and drop the columns to the **Selected Columns** pane.
  - c. To configure the sorting order for a column, click the configure icon, select **Sort**, and then select the sorting method.
  - d. To configure filters for a column, click the configure icon, select **Filter**, and then configure the filter based on the **Parameters** configuration element.
6. To add time-based columns to the report:
  - a. On the **Criteria** tab, find the columns in the **Subject Area** pane that corresponds to the **Columns** and the **Group Number** configuration elements.
  - b. Drag and drop the columns to the **Selected Columns** pane.
  - c. To configure the sorting order for a column, click the configure icon, select **Sort**, and then select the sorting method.
  - d. To configure filters for a column, click the configure icon, select **Filter**, and then configure the filter based on the **Parameters** configuration element.
7. Click **Save As** to save the report, and enter a new report name or use the value in the **Report Name** configuration element. You can then publish the report.
8. Perform the following steps to update the migration status of the report. The status is for administrative information only and does not impact operations.
  - a. In Reporting and Analytics, click **Reports**, and then click **Ad Hoc Report**.
  - b. Find the report you want to convert, and then click the **Migration Status**.
  - c. Select the new migration status for the report, and then click **Save**.

# 20

## Standard Export

Standard Export supports end-of-day (EOD) and end-of-week (EOW) exports from all Point-of-Sale (POS) applications that can interface with Oracle MICROS Enterprise Back Office.

The Enterprise Information Portal (EIP) collects information from the Point-of-Sale. When used with Oracle MICROS RES 3700, the EIP collects transactional information every 15 minutes and daily information such as time and labor activity every night after end-of-day. When using with Oracle MICROS Symphony, the EIP collects transactional information in realtime. The EIP then loads the information into an Oracle Data Warehouse to be made available for reporting and exporting.

The Admin Schedule creates an export file based on system administrator or, in some cases, customer configurations.

For detailed information about standard export, refer to the *Oracle MICROS Reporting and Analytics Standard Export User Guide*.