V3 Analytics Considerations
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## Document Versioning

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<tr>
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<td>20170801</td>
<td>Draft published</td>
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<tr>
<td>August 31, 2017</td>
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Introduction
In Release 35, a new Analytics platform, referred to in this document as V3 Analytics, is available in Oracle CRM On Demand through a new tab called Analytics. This document refers to the previous but still supported Analytics platform, available through the Reports and Dashboard tabs as V2 Analytics. This document contains important information regarding the migrated reports and the activities that you need to perform to publish the migrated reports. Please review the Introducing V3 Analytics document before reading the considerations in this document.

V3 Analytics Considerations
You can expect that specific reports will not migrate correctly, and you will need to be review, modify, test them with appropriate permissions set and possibly move them to a different folder before publishing them. You can find examples of some of the adjustments you must make before publishing reports in this document.

Empty Folders in Company Wide Shared Folder
Description
Custom empty folders from the V2 Company Wide Shared Folder will be excluded from the migration.

Workaround
Save at least one object in all the V2 custom folders, or manually recreate the custom folders in V3 Analytics.

Objects Saved under My Analyses (My Folders)
Description
Objects saved under My Folders in V2 Analytics will be excluded from the migration.
Workaround

Save copies of these objects in V2 Company Wide Shared Folder and run them at least once to OR manually recreate the personal analyses in V3 Analytics.

V2 Links Pointing to Custom Folders that are Empty

Description

Any V2 links that are pointing to a V2 custom folder that is empty will be missing since the empty custom folders will not be migrated.

Workaround

Save at least one object in all the V2 customer folders that are referred to by the links, or manually recreate the custom folders and the link referring to them in V3 Analytics.

Filters Based on Requests from Personal Analyses

Description

In V2 Analytics you can create filters based on records returned from other analyses. If you have saved the referenced analysis in My Analyses (My Folders), then the analysis that has a reference to it will fail because the personal analysis will not be included in the migration.

Image: Creating Column Filters Based on Existing Personal Request (Analysis) in V2 Analytics
Image: Opening a Migrated V3 Analysis Containing a Reference to a V2 Analysis Saved in My Folders (not Migrated)

Image: Error Displayed When Opening a Migrated V3 Analysis with a Reference to a V2 Analysis Saved in My Folders (Not Migrated)

Workaround

Save all the referenced analyses under Shared Folders, run them at least once, and modify the filter to refer to the analysis that you have saved under Shared Folders. Alternatively, you can manually recreate the personal analyses in V3 Analytics and edit the filter to refer to the newly created personal analysis.
Navigation Interactions with Targets to Personal Analyses

Description

In V2 Analytics, you can create interactions of type “Navigate” and define targets to personal analyses. If you have saved the analysis defined in the target field into My Analyses (My Folders), then the navigation to this analysis will fail since the personal analysis will not be included in the migration.

Image: Defining Navigation Interactions to Existing Personal Request (Analysis) in V2 Analytics
Workaround

Save all the referenced analyses under Shared Folders and run them at least once, and modify the navigation to have the target referring to an analysis that you have saved under Shared Folders. Alternatively, you can manually recreate the personal analyses in V3 Analytics again and validate or edit the action link to point to the new V3 Analytics personal analysis. If you choose to manually recreate the personal analysis, and then select the Column properties of the column for which you define the interaction, and then select the Interaction Tab and edit the Action Link to navigate to the newly created V3 personal analysis.

Image: Editing a Navigation Interaction to a Newly Created V3 Personal Analysis by Selecting Column Properties > Interaction Tab > Select Action Link > Edit Action Link
Action Links using Custom CSS Class

Description

In V2 Analytics the action links that navigate to detail pages in Oracle CRM On Demand use the Custom CSS Class ActionLink. All the action links contained in V2 reports will no longer work; the navigation using these links will have no response.
Workaround
You must recreate these action links by following the steps referring to action links that are currently outlined in the *Introducing V3 Analytics* document, in the Left-Click Interactions section.

Catalog Objects with Full Path Longer than 150 Characters

Description
The names of the catalog objects that need to be migrated are taken from the Usage Tracking Analysis Subject Area. V2 Catalog objects with names including the path longer than 150 characters will fail during migration.

Workaround
Follow the steps below:

1) To see if you have such cases, build a report using the Content Details, Content Name, Content Type and Content Category Code columns from the Content folder of the Usage Tracking Analysis Subject Area.
2) Add a new column that calculates the length of the Content Details column concatenated with a separator i.e. '/' concatenated with Content Name i.e. LENGTH(Content."Content Details"||'\'||Content."Content Name").
3) Add a filter to Content Type to filter all the records where Content Type does NOT equal Personal Report.
4) Add a filter to Content Category Code to filter all the records where Content Category Code equals Analytics.
5) Add a filter to the new added column LENGTH(Content."Content Details"||'\'||Content."Content Name")>=150.

6) For each record where the string concatenation between Content Details, a separator, that is '/' and Content Name column has a length of 150 or more characters, check if the concatenated string represents the entire path to the catalog object. If not, then save the catalog object to have the name including the path under 150 characters and run the object at least once in order to be recorded in the Usage Tracking Analysis Subject Area.

*Image: Determining if there are Catalog Objects with a Full Path (including name) longer than 150 characters*
Object Names in V3 Catalog

Description

In V3 Analytics, catalog objects or folders having in their names the string ‘$&’ can cause certain browsers to become nonresponsive. After migration, if the V2 Catalog contains objects or folders with the string ‘$&’ in their names, the V3 Catalog page will become nonresponsive.

Workaround

Rename or save the V2 object or folder with a name that does not contain the string ‘$&’.

Folders Containing Reports in V3 Dashboards

Description

In Preview mode, migrated V3 Dashboards containing folders will not render the reports as hyperlinks, however when the report names are clicked, they can be opened.

Image: Preview Mode for a Folder Containing Reports Included in a V2 Dashboard Rendering the Reports as Links
Workaround

None. This is a rendering issue that does not impact functionality.

Reports with Funnel Charts

Description

In V2 Analytics, users can add funnel charts to their reports. The funnel charts in migrated V3 reports do not get migrated properly.
Workaround

None. Remove the view containing the existing funnel chart and recreate the funnel chart in the migrated V3 report by selecting New View > Funnel in the Results Tab of the migrated V3 report.

*Image: Adding a New Funnel Chart in Migrated V3 Report*
Reports with “Title” Views containing Logo Image

Description
In V2 Analytics, users can add views of type “Title” to their reports. When using this type of view, users can optionally add a Logo by specifying the URL of a custom image. The images will be missing from the migrated V3 reports.

![Build and View Analysis](image)

Image: Defining the Logo Image for a Title View

Workaround
None. Oracle CRM On Demand will fix this functionality in a future version of V3 Analytics.
“Pivot” Views for Reports with Rows and some Empty Columns

Description

If a V2 report contains rows with some empty columns and users add pivot views, the pivot views for the migrated V3 reports will render with a minor distortion.

Image: Pivot View added to a V2 Report with Rows and Some Empty Columns

Workaround

None. This is the OOTB functionality in V3 Analytics.
Dashboards with Multiple Tabs

Description
If a V2 dashboard contains multiple tabs, some versions of Chrome browsers will display the migrated V3 dashboard with a minor distortion. The issue is not visible with other browsers.

Workaround
None. This is a rendering issue that does not impact functionality.

Reports with Date Prompts

Description
In V2 Analytics, in Step 3 of creating an analysis, users can define prompts of Date type. When defining the Date prompt, if the report author chooses the option for user to "Browse through choices and/or type in directly" and the option to show no values to the user, at run time, the Date prompt will display a calendar icon. However, when the report is migrated to V3 analytics, the calendar icon will not display, instead, an empty drop-down will display.

![Creating a Date Prompt That Displays the Calendar Icon in V2 Analytics](image_url)
Workaround

Edit the Date prompt in V3 Analytics. Select Prompts Tab → select the Date prompt → edit the Date prompt → select Calendar in the User Input drop-down → click OK.
Folders Containing Pre-Built Reports in Dashboards

Description

The migrated V3 Dashboards with folder objects containing prebuilt analyses display extra nonexpandable folders for each prebuilt report contained in the folder.

<table>
<thead>
<tr>
<th>Quick List Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts by Sales Rep</td>
</tr>
<tr>
<td>Activities by Opportunity</td>
</tr>
<tr>
<td>Contact Mailing List</td>
</tr>
<tr>
<td>Employees and Managers List</td>
</tr>
<tr>
<td>Employees List</td>
</tr>
<tr>
<td>Opportunities by Account</td>
</tr>
<tr>
<td>Opportunities by Sales Stage</td>
</tr>
<tr>
<td>Service List</td>
</tr>
</tbody>
</table>

*Image: Folder in a V2 Dashboard, Containing Prebuilt Analyses*

*Image: Folder in a Migrated V3 Dashboard, Containing Prebuilt Analyses*

Workaround

None. This issue does not impact functionality.
Reports with Filter Prompts on Nullable Columns

Description
Filter prompts on columns that can contain null values have an extra NULL value in the values drop down for the V3 migrated reports. This gives the user the ability to select the records where the column value IS NULL (empty).

Image: Prompt for a Nullable Column in V2 Analytics

Image: Prompt for a Nullable Column in V3 Analytics, Containing the NULL New Option

Workaround
None. This is a new feature introduced in V3 Analytics.
V3 Reports and Dashboards with Long Names at Runtime

Description

At run time, when you open the V3 migrated report or dashboard, Oracle CRM On Demand displays it in a tab. If the name of the migrated report or dashboard is long it gets displayed properly in the title but gets truncated in the tab’s caption.

Workaround

None. This is the default functionality in V3 Analytics.
Hidden Calculated Columns

Description

In V2 Analytics, users can define a column as hidden in a report by performing the following steps: In Step 1 Define Criteria → select Calculated Column → select Column Properties → select Column Format tab → check Hide checkbox → click OK.

In Step 2: Create Layout you define three views. First is a Table view, second is a Pivot view and the third is a Pie Chart view. The current behavior is that the Calculated Column will be hidden only in the Table view. The Pivot view and the Pie chart view ignore the setting. All views of any type excluding the Table view will ignore the setting.
**V3 Analytics**

V3 Analytics considers the setting for all three views, which is the correct behavior, since the setting defined at the column properties level should be applied for all type of views.

**Workaround**

If you want to have the V2 results in V3 Analytics, unhide the column by selecting Criteria tab → select Calculated Column → select Column Properties → select Column Format → uncheck Hide checkbox → click OK.
In the Results tab, select Edit View on the Table view.

Select the Layout pane of the Table view from the bottom of the Analytics page, go to the Calculated Column and either choose Hidden or move the Calculated Column to the Excluded drop target. A drop target indicates where a column can be inserted, moved to, or dropped to. You use drop targets to modify the way data is arranged in a data view by dragging and dropping columns to different targets within the view.
Image: Choosing the Hidden Option to Hide the Calculated Column

OR

Image: Moving the Calculated Column to the Excluded section to Hide the Calculated Column

Now the end result is exactly the same as in V2 Analytics.

Image: V3 Analytics Report with the Calculated Column Hidden Only in the Table view
Reports with Rotated Labels

Description

Reports that contain chart views (that is, Horizontal Bar) with the Rotate labels setting checked with a setting different from 90, 0 or -90 (e.g. 45 degrees), get migrated in V3 Analytics with a label orientation of 90 degrees.

In V3 Analytics the Rotate labels check box is no longer available. The equivalent setting is Label Orientation and the possible values are 90, 0 and -90.
Workaround

To fix this issue you need to select View Properties → Titles and Labels tab → In Labels section select Vertical Axis Labels → In Display Options tab change the Label Orientation from 90 to 0 degrees.

*Image: Highlighting the Various Settings Required to Change the Label's Rotation*

Now the result for V3 Analytics is as following, it is not the same as V2 but it eliminates the overlapping labels.

*Image: Migrated V3 Report with the Label Rotation Updated to 0 Degrees*
Reports with Pivot Tables

Description
Pivot tables in V3 migrated reports have minor formatting differences compared to pivot tables in V2 reports.

<table>
<thead>
<tr>
<th>Account Type</th>
<th>Administrator</th>
<th>Advanced User</th>
<th>Executive</th>
<th>Field Sales Rep</th>
<th>Inside Sales Rep</th>
<th>Regional Manager</th>
<th>Sales &amp; Marketing Manager</th>
<th>Sales Rep</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitor</td>
<td>60000.00</td>
<td>19600.00</td>
<td>12800.00</td>
<td>31540.23</td>
<td>11400.00</td>
<td>3840.00</td>
<td>16000.00</td>
<td>16000.00</td>
</tr>
<tr>
<td>Customer</td>
<td>259762.00</td>
<td>2000.00</td>
<td>14400.00</td>
<td>341540.23</td>
<td>114000.00</td>
<td>3840.00</td>
<td>16000.00</td>
<td>16000.00</td>
</tr>
<tr>
<td>Dealer</td>
<td>18700.00</td>
<td>0.00</td>
<td>129600.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
<td>0.00</td>
</tr>
<tr>
<td>Partner</td>
<td>477758.00</td>
<td>0.00</td>
<td>4000.00</td>
<td>0.00</td>
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<td>0.00</td>
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<tr>
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<tr>
<td>Grand Total</td>
<td>59735811.00</td>
<td>26000.00</td>
<td>30400.00</td>
<td>356840.23</td>
<td>624340.00</td>
<td>1135000.00</td>
<td>1443600.00</td>
<td>16000.00</td>
</tr>
</tbody>
</table>

*Image: Pivot Table in a V2 report - Highlighting the Differences Compared to a Pivot Table in a V3 report*

Workaround
None. This is the default functionality in V3 Analytics and does not impact functionality.

Chart Pivoted Results in Pivot Tables

Description
Chart Pivoted Results feature in V2 reports and "Pie" selection in the Graph drop down creates a pie chart based on the values from the very first column of the pivot table. Due to this behavior, a single chart gets created to graph the data. For the migrated V3 reports, a separate pie chart will be created for each column of the pivot table which is the correct behavior.
**Image:** Chart Pivoted Results in V2 Reports Based on the First Column in the Pivot Table

**Image:** Chart Pivoted Results in V3 Reports with Charts for Each Column from the Pivot Table

**Workaround**

None. This is the OOTB functionality in V3 Analytics that is a fix for an existing issue in V2 Analytics.
Gauge View Ranges

Description

In V2 reports, when adding Gauge views, the users can specify Gauge Ranges. The Gauge chart legend displays these ranges as numbers. For the migrated V3 reports, the Gauge Ranges are no longer displayed as numbers but as percentages.

Image: Gauge View Legend in a V2 Report Displaying the Gauge Ranges as Numbers

Image: Gauge View Legend in a V3 Report Displaying the Gauge Ranges as Percentages

Workaround

None. This is the default functionality in V3 Analytics.
Report Prompts and Default Values

Description
In V2 reports, in Step 3 of creating an analysis, the users can define report prompts. When defining report prompts if the report author chooses the option for user to select a value from a drop-down list, at run-time, the first value in the drop-down list is selected by default. However, when the report is migrated to V3 analytics, the first value in the drop-down list will no longer be selected by default.

*Image: Creating a Drop-Down Report Prompt Defaulting the First Value at Run Time in V2 Analytics*

*Image: Drop-Down Report Prompt no Longer Defaulting a Value at Run Time for a Migrated V3 Report*

Workaround
Edit the report prompt in V3 Analytics. Select the Prompts tab → select the report prompt → edit the report prompt → expand Options section → in the General tab select Specific Value in the Default selection drop down → click + icon → in the Select Values dialog select the first value → click OK. Navigate back to Edit Prompt dialog and click OK again.
**Image:** Editing a Report Prompt to Default the First Value in the Drop-Down

**Image:** Specifying the First Value as the Default in the Report Prompt Drop-Down
Previewing Reports and Content Pagination

Description

In V2 reports, the pagination buttons are shown by default when previewing reports with many records. The migrated V3 reports will no longer keep this setting. In V3 Reports, an additional option “Fixed headers with scrolling content” is available, and is selected by default. The migrated V3 reports will have this new option set.
Image: V3 Report with the New Default Option “Fixed headers with scrolling content”

Workaround

Edit Table View Properties, select the Content paging radio button and click OK.

Image: Editing Table View Properties to set the Content Paging in V3 Reports
Integrated Cloud Applications & Platform Services

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