

# Oracle® Hospitality OPERA Reporting and Analytics

## User Guide



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

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# Preface

Oracle Hospitality OPERA Reporting and Analytics is a web-based application that centralizes hotel property management 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 Hospitality OPERA Reporting and Analytics Cloud Services.

The navigation instructions throughout the documentation may not accurately depict the menu layout for your Oracle Hospitality OPERA Reporting and Analytics 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 Hospitality OPERA Reporting and Analytics documentation applies to the following users:

- Users who perform day-to-day operations with OPERA Reporting and Analytics and who typically do not have permissions to configure applications.
- Administrators who configure and maintain OPERA Reporting and Analytics. Administrators can also have permissions to configure applications.
- System Administrators or Super Administrators who maintain OPERA Reporting and Analytics 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**

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<https://support.oracle.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 Hospitality product documentation is available on the Oracle Help Center at <http://docs.oracle.com/en/industries/hospitality/>.

**Revision History****Table 1 Revision History**

<b>Date</b>	<b>Description of Change</b>
June 2019	Initial Publication

# 1

## Reporting and Analytics for Hotels

Oracle Hospitality OPERA Reporting and Analytics is a web-based application that centralizes hotel property management data to provide operational and analytical insights and to improve efficiency by delivering information to all roles within an organization. Hotel organizations can use Oracle Hospitality OPERA Reporting and Analytics Cloud Service to leverage data management and business analytics functionality.

The following figure shows the most common tasks for OPERA Reporting and Analytics users. Your business requirements and organization size ultimately determine how you use OPERA Reporting and Analytics. For example, small organizations might have one person who performs system administrator tasks as well as creates and publishes analysis reports.



# 2

## Using Reporting and Analytics

Oracle Hospitality OPERA Reporting and Analytics is a web-based application that centralizes hotel property management data to provide operational and analytical insights into business operations, and to improve efficiency by delivering information to all roles within an organization.

### Maintaining Organizations

Administrators can configure and maintain levels and locations in the OPERA Reporting and Analytics organization. Administrators can also configure and assign reason codes and other definitions for the whole organization or for each level or location.

**Table 2-1 Managing Organizations**

I Want To	Go To
Configure the organizational hierarchy by maintaining the levels, and locations in the organization and by modifying the relationships between levels and locations.	<a href="#">Organizations, Locations, and Levels</a>
Configure and assign a list of default reasons for performing operations such as returns and voids.	<a href="#">Reason Codes</a>



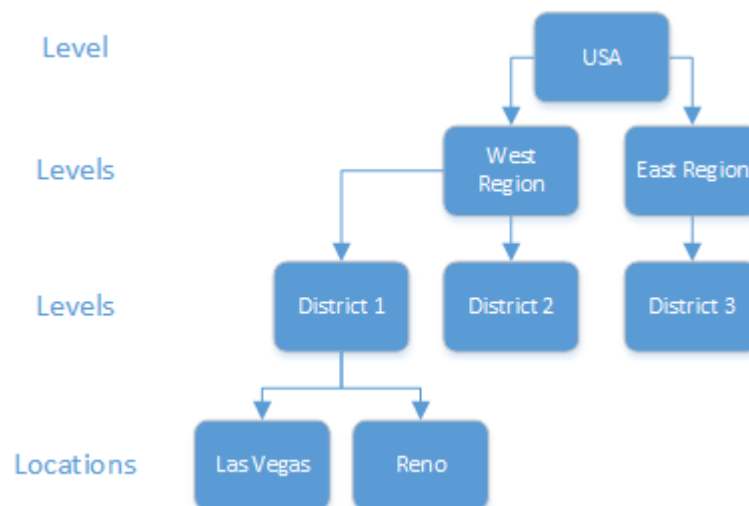
# 3

## Organizations, Locations, and Levels

An organizational hierarchy provides the structure to an enterprise and its locations. 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 OPERA Reporting and Analytics.

The hierarchy consists of levels and locations. A location is a hotel. 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 3-1 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 locations, Jen can see information for those locations only. She cannot see information for the locations related to the other districts.

### Adding Levels

1. In OPERA 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` to 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. Specify values for basic level settings on the form, such as address and postal code, and then click **Save**.

## Adding Locations

OPERA Cloud and OPERA Property v5 SaaS locations are automatically synced to OPERA Reporting and Analytics as part of the provisioning process completed by your Oracle Cloud Enablement team. Steps for the manual creation of a location are for OPERA Property locations only.

1. In OPERA Reporting and Analytics, click **Admin**, click **Portal**, click **Organizational Structure**, and then click **Locations**.
2. Click **Add**.
3. In the **Property Name** field, type a unique name for the location.  
For example, type `Columbia` for a hotel location in Columbia, Maryland.
4. In the **Location Reference** field, type a value to indicate the unique property for this location within the organizational hierarchy.
5. In the **Chain Code** field, enter the existing Chain Code that this property shall be associated within the organizational hierarchy.
6. Specify values for the remaining settings on the form and then click **Save**.

## Establishing Relationships Between Levels and Locations

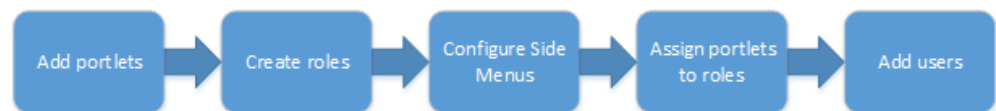
1. In OPERA Reporting and Analytics, click **Admin**, click **Portal**, click **Organizational Structure**, and then click **Relationships**.
2. Select the highest level in the organization, and then click **Edit**.
3. Select **No Parent** from the **Parent Name** drop-down list.  
Select **No Parent**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

# 4

## Roles, Permissions, and Users

OPERA Reporting and Analytics uses roles and portlets to control access to content and functionality. A role defines privileges for a user type, and a portlet represents content or functionality. For example you provide access to OBI Self-Service through the OBI Self-Service portlet. You provide access to Administration modules through the Portal portlet.

The following figure illustrates a typical flow for setting up roles and adding users to OPERA Reporting and Analytics:



OPERA Reporting and Analytics has the following default roles:

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.
General Manager	Manager account with access to hotel reports and functions.

If the default roles do not meet your business requirements, you can create roles and specify privileges for the new roles. For example, your organization has a district level with three districts. Each district has three hotels. You can create a District Manager role. When you add a District Manager user, you assign the user to the district organization level and to the new District Manager role. Because of the district-hotel relationship settings in OPERA Reporting and Analytics, District Managers can view information for only the hotels in their districts.

You provide access to portlets through side menus. When you configure a side menu, you add it to a role and then you define the order in which the side menu appears in OPERA Reporting and Analytics.

### Adding Portlets

1. In OPERA 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 OPERA 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.

## Creating Roles

1. In OPERA 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.
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	When you set up your organization, the market segmentation type must be set to Hotel (HTL)
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.

Field	Description
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	Not applicable to hotels, do not use.
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 OPERA Reporting and Analytics through APIs.
Revenue Center Type	Not applicable to hotels, do not use.
OBI Subject Area Access	Role members can work with analysis reports for the subject areas associated with the selected class.
Add/Update OBI Subject Area Classes	Role members can add or update subject area classes for analysis reports.
Delete OBI Subject Area Classes	Role members can delete subject area classes for analysis reports.

5. Click **Save**.

## Configuring Side Menus

1. In OPERA Reporting and Analytics, click **Admin**, click **Portal**, click **Roles**, and then click **Side Menus**.
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 OPERA Reporting and Analytics navigation pane. For example, if you type 1, the menu is the first menu listed in the navigation pane on the OPERA Reporting and Analytics home page.

6. Click **Save**.

## Assigning Portlets to Roles

1. In OPERA 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 OPERA 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**.

## Adding Users



### Note:

Whenever a new role is created or an existing role is updated, it is suggested to delete the browser cache, cookies, and offline website data of your browser. Browser-specific instructions can be found at [MOS Article 2694300.1](#)

1. In OPERA Reporting and Analytics, click **Admin**, click **Portal**, click **Users**, and then click **Users**.
2. Click **Add**, and then complete the form.

The following table provides tips on completing some of the settings:

Setting	Description
Logon Name	User name for logging in to OPERA Reporting and Analytics.
Display Name	The name that appears on the user's myPage. For example, enter the user's first name.
Role	Select a default role for the user or select a role you created for your organization (for example, District Manager). The user inherits the system privileges associated with the role.
Active	Select to enable the user account.

Setting	Description
Org Level	The level you select determines the level of access for the user. For example, a District Manager can access information for all the locations related to the level. To limit access to store-level information for a store manager, select the store from the drop-down list.
Revenue Center	Not applicable to hotels, do not use.
Chain Code	Restricts access to information at the hotel chain level, select all the hotel chains to which the user belongs.

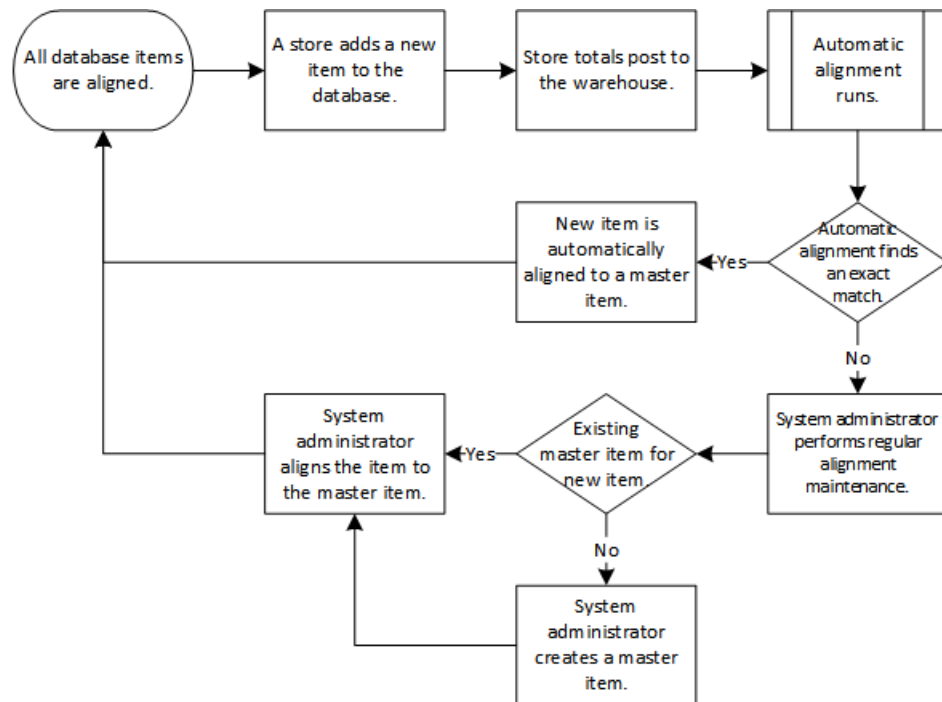
3. Click **Save**.

# 5

## 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. OPERA Reporting and Analytics allows you to define the mastery entries for items, such as room categories, and hotel chains. Item alignment matches same items under the correct master item, ensuring that reporting and calculations account for variances in naming or entry and that data remains organized. The following diagram provides an overview of the workflow for automatically and manually aligning items added to the database.

**Figure 5-1 Item Alignment Process**



This section contains the following topics:

### Item Alignment

Item alignment consists of the following components:

- **Master Items:** The parent item instance under which same items post.

For example, a hotel chain can offer a room containing a single King-sized bed, one shower and bathroom, a TV, and a desk. Each hotel can name or refer to this room differently, such as *single*, *standard* or *single bed*. By default, reports and calculations handle these two entries as completely different entities.



To consolidate the two entries, you can create a Room Category Master Item named `Standard Single`, and then link the two entries to the master item. OPERA Reporting and Analytics then always treats posted entries for `single`, `standard` and `single bed` as a `Standard Single` room entry.

- **Master Groups:** A grouping of locations for assigning master items and alignment rules. Each Master Group must be assigned at least one Master Store. Each location can only be assigned to one Master Group for each item type.

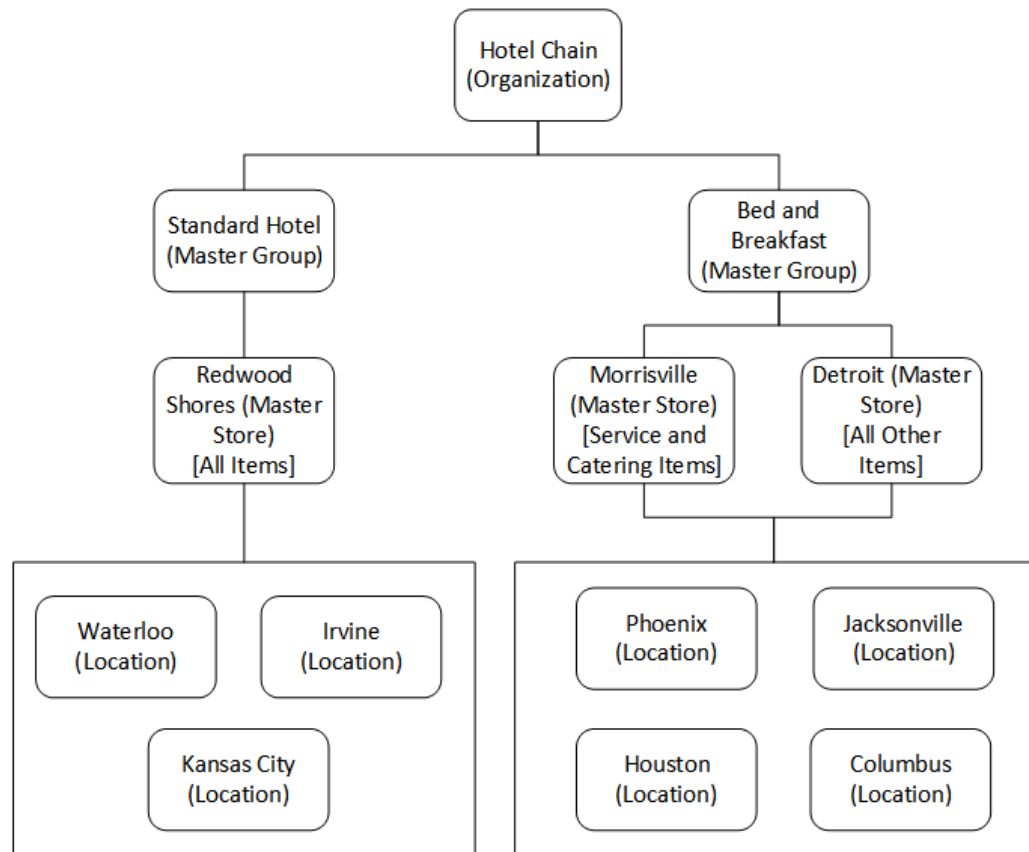
A hotel chain can configure a group for each operational region. This allows the hotel chain to create a set of master items and alignment rules for different regions and countries without worrying about conflicts or different naming schema. For example, the chain can create the Master Groups `US & Canada` and `Australia`, and then assign a different Room Category Master Item to each group to account for differences in mattress sizing across the two regions.

- **Master Store:** A location that sets default Master Items for selected item types for their assigned Master Group. You can only assign one master store for each item type.

For example, a hotel chain configures a Master Group for each operational region, and assigns the `Redwood Shores` location as the Master Store and headquarters for all items for each region. When a new room type offering is introduced to the system in the `Redwood Shores` location, OPERA Reporting and Analytics treats the `Redwood Shores` instance as the Master Item. When a new room type is introduced to the system in another location, OPERA Reporting and Analytics attempts to align the new room type to existing Master Items, and you must either manually configure a Master Item or create an instance of the room type at the `Redwood Shores` location.

The following diagram provides an example of an organization that defines two master groups to separate item alignment between standard hotel and bed and breakfast locations.

Figure 5-2 Example Master Group and Master Store



## Configuring Automatic Alignment Rules

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

1. In OPERA Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Alignment Rules**.
2. Select the item property for alignment from the **Alignment Type** drop-down list. OPERA Reporting and Analytics searches for and aligns items with exact case-sensitive matches.
  - **Reference Only**: aligns items with the same property management system ID.
  - **Name Only**: aligns items with the same name.
  - **Name and Reference**: aligns items with the same name or property management system ID.
3. Select the number of times the application attempts to align an item.

## Configuring a Master Group

1. In OPERA 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**, then click **Add PMS Location**
3. Enter a name, suffix, and comment for the Master Group, and then click **Save**.

OPERA 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 `KINGBED`, OPERA Reporting and Analytics appends the suffix and shows the item as `KINGBED.FOH`.

## Assigning Locations as Master Stores

1. In OPERA 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.
  - For Hotel and Resort organizations, you must select the following sets together:
    - **Rate Category** and **Rate Class**
    - **Product** and **Package Forecast Group**
    - **Revenue Type** and **Revenue Group**
    - **Promotion** and **Marketing Program**
    - **Promo Service** and **Promotion**
    - **Event Type** and **Meal Type**
    - **Trans Subgroup** and **Trans Group**
    - **Room Category**, **Room Class**, and **Rate Category**
    - **Catering Item**, **Catering Item Class**, and **Revenue Type**
5. You can select **Assign as location** if you deactivate the location as a Master Store.

## Assigning Locations to the Master Group

1. In OPERA 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.
  - For Hotel and Resort organizations, you must select the following sets together:
    - **Rate Category** and **Rate Class**
    - **Product** and **Package Forecast Group**
    - **Revenue Type** and **Revenue Group**
    - **Promotion** and **Marketing Program**
    - **Promo Service** and **Promotion**
    - **Event Type** and **Meal Type**
    - **Trans Subgroup** and **Trans Group**
    - **Room Category**, **Room Class**, and **Rate Category**
    - **Catering Item**, **Catering Item Class**, and **Revenue Type**
5. Click **Save**.

## Configuring Master Items for Hotels

1. In OPERA Reporting and Analytics, click **Admin**, click **Warehouse**, click **Hotel Master Items**, and then click the item category for which you want to configure a Master Item.
2. Click **Add**, or select an existing master item and click **Edit**.
3. Configure the Master Item:
  - a. Configure the **Name** and select the **Master Group** from the drop-down list.
  - b. If the item category includes parent master items, select the respective Master Items. For example, the Room Category Master Item has a parent Room Class and parent Rate Category.
  - c. Do not change the **PMS Ref**. OPERA Reporting and Analytics generates the reference ID.

## Manual Item Alignment

To perform manual item alignment, in OPERA Reporting and Analytics, click **Admin**, click **Warehouse**, click **Alignment**, and click the type of database item.

I want to	Then do
Filter the list of master items.	Click <b>Options</b> .
Align an item.	<ol style="list-style-type: none"> <li>1. Click the master item from the <b>Master Items</b> list.</li> <li>2. Click the unaligned item from the <b>Unaligned Items</b> tab, and then click <b>Align</b>.</li> </ol>

I want to	Then do
Change the alignment of an item.	<ol style="list-style-type: none"> <li>1. Click the master item from the <b>Master Items</b> list.</li> <li>2. Click the item from the <b>Aligned Items</b> tab, and then click <b>Transfer</b>.</li> <li>3. In the <b>Select destination master item</b> window, click the destination master item, and then click <b>OK</b>.</li> </ol>
Designate an aligned item as an alias.	<p>If the alignment rule allows menu item aliasing:</p> <ol style="list-style-type: none"> <li>1. Click the master item from the <b>Master Items</b> list.</li> <li>2. Click the item from the <b>Aligned Items</b> tab, and then click <b>Alias</b>.</li> </ol>
Unalign an item.	<ol style="list-style-type: none"> <li>1. Click the master item from the <b>Master Items</b> list.</li> <li>2. Click the item from the <b>Aligned Items</b> tab, and then click <b>Unalign</b>.</li> </ol>
Merge master items.	<ol style="list-style-type: none"> <li>1. Click the master items from the <b>Master Items</b> list, and then click <b>Merge</b>.</li> <li>2. In the <b>Select master item</b> dialog box, click the master item you want to keep, and then click <b>OK</b>.</li> </ol>
Designate an unaligned item as a master item.	<ol style="list-style-type: none"> <li>1. Click an item from the <b>Unaligned Items</b> tab and then click <b>Create Master</b>.</li> <li>2. Fill out the <b>Create Master</b> form, and then click <b>OK</b>.</li> </ol>
Configure alignment rules.	<ol style="list-style-type: none"> <li>1. Click <b>Modify Rules</b>.</li> <li>2. Fill out the form, and then click <b>Create</b>.</li> </ol>
Run the alignment process immediately.	Click <b>Run Alignment</b> .

# 6

## 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 OPERA Reporting and Analytics. You can perform the following configurations:

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

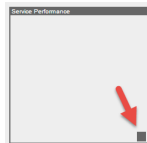
You can configure up to three myPage screens. OPERA Reporting and Analytics shows your first myPage screen after you log in.

#### Related Topics

- [Configuring myPage Content](#)
- [Configuring User Preferences](#)

## 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.



#### Related Topics

- [myPage](#)

## 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 OPERA 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**.

#### Related Topics

- [myPage](#)

# 7

## Reason Codes

Hotel operations 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 OPERA Reporting and Analytics, click **Admin**, click **Warehouse**, click **Miscellaneous**, and click **Enterprise Reason Codes**.
2. Select the action and then click **Select**.
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**.

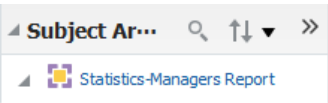
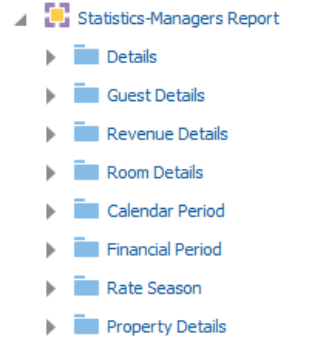
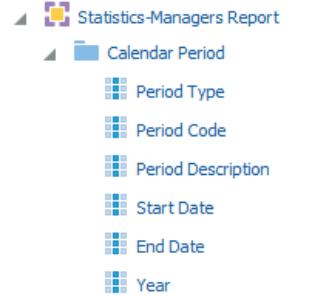



# 8


## Analysis Reports

Analysis Reports enables you to design and maintain reports and visualizations of data posted to OPERA Reporting and Analytics. Analysis reports are comprised of:

**Table 8-1 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 Statistics - Managers Report subject area contains operations data for guest, revenue, room and rates.	
Folders provide a named grouping of columns.	The Statistics - managers Report subject area contains multiple folders. Folders will contain attributes and measurements based upon each of the folders names.	
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 Calendar Period folder contains attribute columns such as Period Code and Year.	
Hierarchical columns hold data values that are organized using named levels and parent-child relationships. Hierarchical columns enable users to drill down into the data, and their folder name typically contains Hierarchy.	Some files may contain the Calendar Year Hierarchy column, which can drill down into the All Years, Calendar Year, Calendar Month, and Business Date Detail columns.	

**Table 8-1 (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 Measures in their names.	The Statistics-Managers Report subject area contains folders that contain measure columns for items such as counts and revenues..	

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 enable 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 OPERA Reporting and Analytics.

This section contains the following topics:

#### Related Topics

- [Creating Subject Area Classes](#)

## Subject Areas Classes

Use subject area classes to provide end users with access to specific subject areas of data. For example, your organization has an accounting role. You can create a subject area class named Accounting Analysis and link the Accounts Receivable subject area to it. After you assign the Accounting Analysis class to the accounting role, only members of the accounting role can create analysis reports for data within the Accounts Receivable subject area. The members see only the Accounts Receivable subject area and no other subject areas.

#### Related Topics

- [Creating Subject Area Classes](#)

## Analysis Report Examples

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

### Corporate Revenue Manager

The Corporate Revenue Manager wants to view a comparison of sales across all properties in different regions and 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 information, including key performance indicators such as Average Daily Revenue and Revenue Per Available Room.

**Figure 8-1 Example Sales Comparison Report**

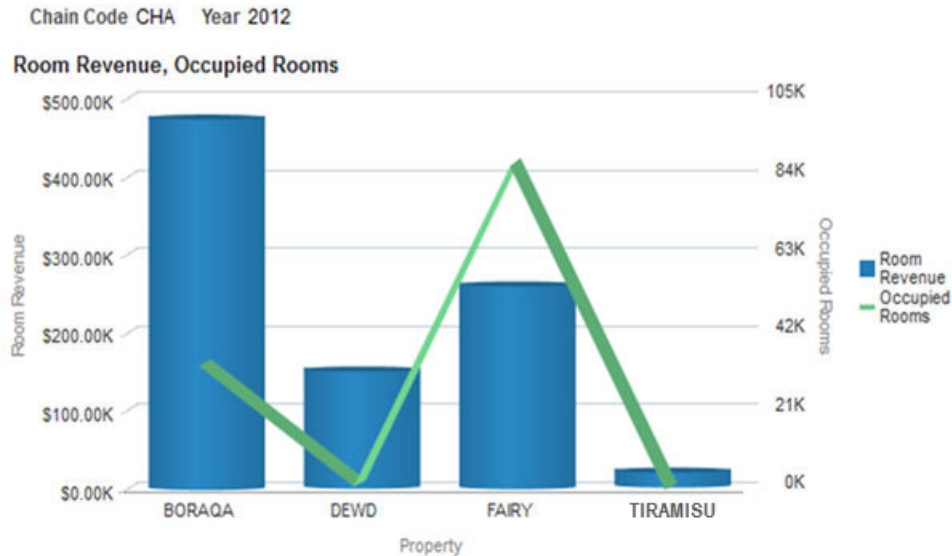
FAIRY 26-12-2012

Market Code	Market Description	Room Type	# of Persons	Room Nights	Arrival Rooms	Departure Rooms	No-Show Rooms	Room Revenue	Food Revenue	Other Revenue	Total Revenue	Avg Spend per Guest	ADR
CG	Corporate Group	DLXKG	2	1	0	0	0	\$80.00	\$0.00	\$0.00	\$80.00	\$40.00	\$80.00
LT	Leisure Traveler	DLXDB	28	25	4	1	0	\$4,568.00	\$0.00	\$0.00	\$4,568.00	\$163.14	\$182.72
		DLXKG	34	27	4	0	0	\$5,318.00	\$0.00	\$0.00	\$5,318.00	\$156.41	\$196.96
		JRSTE	16	4	0	0	0	\$580.00	\$0.00	\$0.00	\$580.00	\$36.25	\$145.00
		KGSTE	2	4	0	0	0	\$176.00	\$0.00	\$0.00	\$176.00	\$88.00	\$44.00
		PHSTE	2	1	0	0	0	\$88.00	\$0.00	\$0.00	\$88.00	\$44.00	\$88.00
		STDDB	31	24	3	0	0	\$4,458.00	\$0.00	\$0.00	\$4,458.00	\$143.81	\$185.75
		STDKG	36	26	4	0	0	\$5,260.00	\$244.00	\$150.00	\$5,654.00	\$157.06	\$202.31
<b>Grand Total</b>			<b>151</b>	<b>112</b>	<b>15</b>	<b>1</b>	<b>0</b>	<b>\$20,528.00</b>	<b>\$244.00</b>	<b>\$150.00</b>	<b>\$20,922.00</b>	<b>\$138.56</b>	<b>\$183.29</b>

### Regional Hotel Manager

The Regional Hotel Manager wants to identify the most and least profitable properties as well as positive and negative sales and cost outliers. You can create a report that allows the user to quickly view the performance of properties across the region and identify the most and least profitable properties. The user can then view key revenue metrics such as average daily rate (ADR) and revenue per available room (revPAR) to identify potential opportunities for improvement.

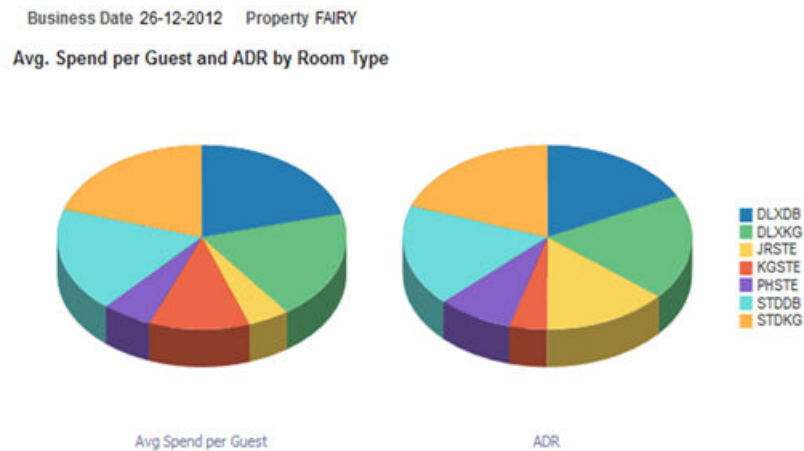
**Figure 8-2 Example Bar Graph Comparing Property Performance Across Regions**



**Property General Manager**

The Property Manager wants to identify the market segment and channel that are driving the booking and focus on segment to market. You can create a report that shows property the average guest expenditure and ADR by room type. This allows the Property Manager to monitor performance and revenue by market mix and to identify both the areas needing focus and the areas with the most potential.

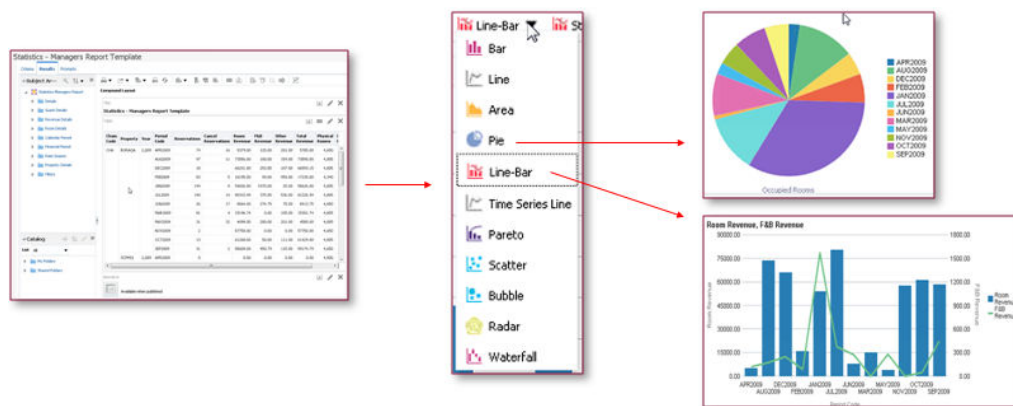
**Figure 8-3 Example Pie Charts Showing Averages by Room Type**



**Hotel Operations Manager**

The Hotel Operations Manager wants to understand performance of operational metrics to improve efficiency. You can create a report that visualizes operational metrics across a period of time to identify areas of improvement.

Figure 8-4 Example Graphs for Operational Metrics



## Report Tutorial: Regional Managers Property Performance

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

### Identify the Data Shown by the Report

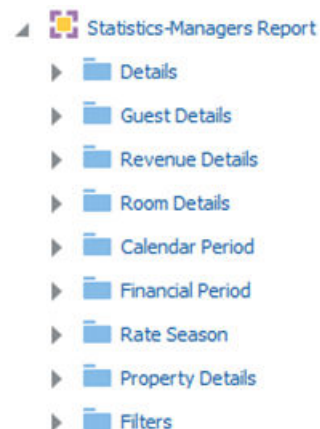
A regional manager wants a visualized comparison of property revenue and performance across all properties in the region. To determine the data to be shown by the report, the regional manager conceptualizes the information needs and decides that for each property, the report should include:

- The total room revenue.
- The total number of occupied rooms.

### Identify the Subject Areas

Identify the subject areas that contain the columns and attributes required for the report. In this example, the **Statistics-Managers Report** subject area contains every column required for creating this report.

Figure 8-5 Statistics-Managers Report Columns

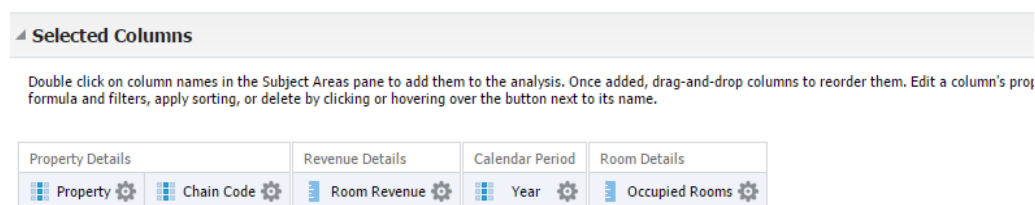


### Add Data Columns to the Report

On the **Criteria** tab, the regional manager adds the following columns:

- Property Details/Chain Code
- Property Details/Property
- Calendar Period/Year
- Room Details/Occupied Rooms
- Revenue Details/Room Revenue

**Figure 8-6 Selected Columns for the Property Performance Report**

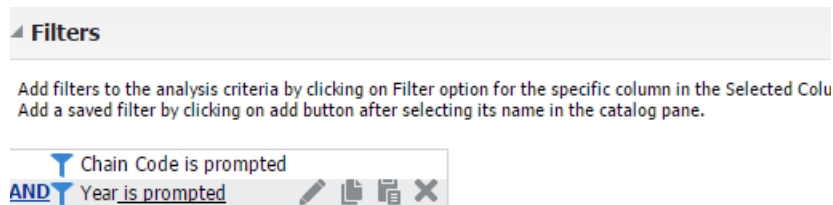


### Add Filters to the Report

On the **Criteria** tab, the regional manager adds the following filters:

- Chain Code (prompted)
- Year (prompted)

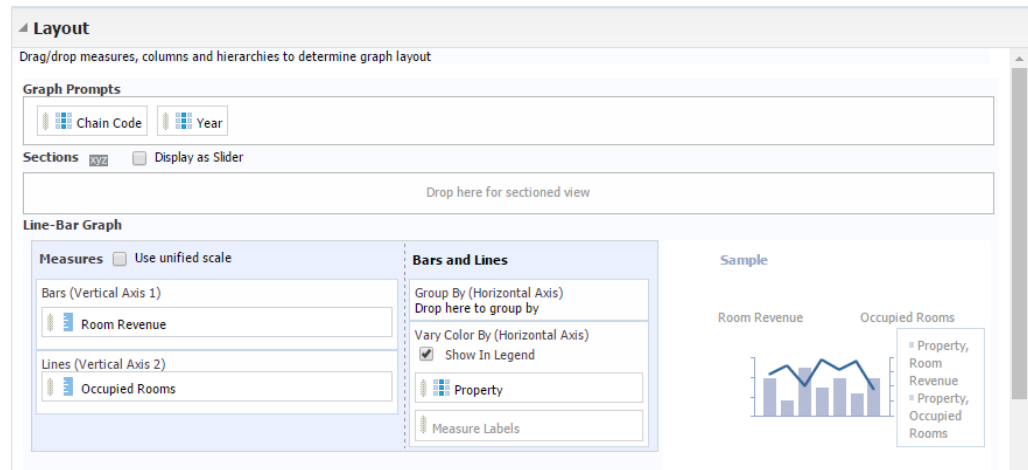
**Figure 8-7 Selected Filters for the Property Performance Report**



### Add Visualizations to the Report

On the **Results** tab, the regional manager begins adding and configuring the report layout and style. To set up a line-bar graph to show the **Total Room Revenue Comparison with Occupied Rooms**, the regional manager maps the data columns as shown in the following image:

**Figure 8-8 Total Room Revenue Comparison with Occupied Rooms Graph Customization**



## Running, Printing, and Exporting Analysis Reports

1. Make sure the report you want to run has been published. OPERA Reporting and Analytics only shows reports for which you have access.
2. In the OPERA 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.

## Creating Subject Area Classes

### Note:

Whenever a new role is created or an existing role is updated, it is suggested to delete the browser cache, cookies, and offline website data of your browser. Browser-specific instructions can be found at [MOS Article 2694300.1](https://www.oracle.com/technetwork/middleware/operareports/26943001.pdf)

1. In OPERA Reporting and Analytics, click **Admin**, click **Portal**, click **Roles**, click **OBI Subject Area Access**, and then click **Add**.
2. In the **Access Class Name** field, type a name (for example, `Accounting`).

3. To add subject areas to the class, click them in the **Available Subject Areas** table. To remove subject areas, click them in the **Selected Subject Area Access** table.
4. Click **Save**.

#### Related Topics

- [Analysis Reports](#)
- [Subject Areas Classes](#)

## 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 OPERA 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**. If your organization is configured to use Food and Beverage subject areas as well as Hotel subject areas, click the corresponding vertical to expand the list of subject areas.
3. Click the subject area for which you want to create the report. If you are configuring a hotel subject area, click **Edit** when shown the report prompts.
4. 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. You can double-click a column to add the column to the end of the table.
  - 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 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 formula in each column, 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.
5. 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**.
6. 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.
  - 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 for the column.
7. 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**.
8. 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.
9. 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**.
10. 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**.
11. Click **Save As** to save the report in your `My Folder`. You can now publish the report.

#### Related Topics

- [Publishing or Unpublishing an Analysis 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 OPERA 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.

#### Related Topics

- [Publishing or Unpublishing an Analysis Report](#)

## Analysis Report Permissions

Analysis Reports implement the following user permissions:

- All users with access to OBIEE Self-Service 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.

#### Related Topics

- [Configuring Analysis Report Permissions](#)
- [Publishing or Unpublishing an Analysis Report](#)

## Configuring Analysis Report Permissions

1. In the OPERA 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 Self-Service portlet, or select **OBIEE Self-Service** and then click **Edit**.
4. Select or unselect **Publish/Un-Publish Analysis**, and then click **Save**.

#### Related Topics

- [Analysis Report Permissions](#)
- [Publishing or Unpublishing an Analysis Report](#)

## Publishing or Unpublishing an Analysis Report

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.

Deleting a report in your `My Folder` does not impact the published copy of the report. You must unpublish the report to remove the published copy.

1. In the OPERA 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. To publish an analysis report to the `Shared Folder` or to change the users and roles for which the report is published:
  - a. Use the filters to find and select the report for which you want to configure permissions, and then click **Publish**.
  - b. 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.
  - c. Use the lists and arrows to add or remove permissions, and then click **Save**.
4. To unpublish an analysis report from the `Shared Folder` for all users and roles, use the filters to find and select the report for which you want to configure permissions, and then click **Unpublish**.

### Related Topics

- [Creating Analysis Reports](#)

### Related Topics

- [Managing Analysis Reports](#)

### Related Topics

- [Analysis Report Permissions](#)
- [Configuring Analysis Report Permissions](#)

## 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 a report every morning that summarizes operations from the previous business day. This allows you to access reports on a set frequency without logging into Reporting and Analytics or manually running the report.

### Scheduling Reports for Email Distribution

1. In the OPERA 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. On the **Report Mail Administration Menu** page, click **Report Mail**.
3. Click **Add**.
4. 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, OPERA Reporting and Analytics sends one report for each location.  If you select <b>Consolidated</b> , OPERA Reporting and Analytics sends aggregate report data for all locations in one email.  OPERA Reporting and Analytics sends each report in a separate email. If you select <b>Zip multiple files</b> , OPERA Reporting and Analytics sends one mail with a ZIP file containing the report files.

5. 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.

6. 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.

7. 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:

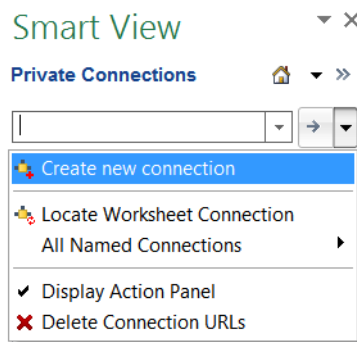
- Daily information, such as the Daily Operations report, show information for the previous business day instead of retrieving information from two days prior.
- Up-to-date information, such as the Today's Operations report, show information for the current business day instead of retrieving information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

## Viewing and Editing Analysis Reports in Microsoft Office

You can use Oracle Smart View for Office to access analysis reports and to work with Reporting and Analytics data from within a Microsoft Office application.

1. On the Reporting and Analytics header, click **Download Smart View**, and then follow the link to download and install Oracle Smart View for Office.
2. Start your Microsoft Office application, and then click the **Smart View** tab.
3. Click **Panel**, click **Private Connections** panel, click the drop-down menu next to the server selection drop-down, and then click **Create new connection**.

**Figure 8-9 Smart View Panel**



4. Click **Oracle BI EE**, enter the URL provided in the Smart View dialog box in Reporting and Analytics, and then click **Finish**.
5. Start your Microsoft Office application, and then use the Smart View pane to view and work with the analysis reports to which you have access. The *Oracle Smart View for Office* documentation contains information and instructions for using Oracle Smart View for Office.

## Dashboards

OPERA 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.

### 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 OPERA Reporting and Analytics.

## Available Dashboards

You can add and view the following dashboards.

**Table 8-2 Dashboards**

Dashboard	Description
Property Overview	<p>This dashboard shows key revenue metrics across all properties or select properties filtered by business date. This includes:</p> <ul style="list-style-type: none"> <li>• Summary metrics such as total revenue, room revenue, average daily rate, and revenue per available room.</li> <li>• A matrix of available and occupied rooms per room type for each property.</li> <li>• Visualizations for the following statistics for the last closed business date: <ul style="list-style-type: none"> <li>– <b>Room Statistics</b></li> <li>– <b>Arrival vs Departure Rooms</b></li> <li>– <b>Group vs Transient Rooms</b></li> </ul> </li> </ul> <p>You can filter the dashboard by properties or business date.</p>
Financials	<p>This dashboard provides visualizations of revenue by market and of payments. The dashboard also contains a summary of ledger activity details.</p> <p>You can filter the dashboard by property, business date, market code, transaction code group, and transaction code sub-group.</p>

Table 8-2 (Cont.) Dashboards

Dashboard	Description
Reservations	This dashboard provides snapshot view of key reservation metrics, including 7-day pickup % and 30-day pickup % for rooms, revenue, and average daily rates (ADR). The dashboard also shows visualizations comparing totals to the previous month and to the previous week. You can filter the dashboard by property.

## Adding and Assigning Dashboards

1. Create an instance of the dashboard as a portlet. You do not need to perform this step if the portlet already exists.
  - a. In OPERA Reporting and Analytics, click **Admin**, click **Portal**, click **Portlets**, and then click **Portlets**.
  - b. Click **Add**.
  - c. Select **Dashboards** from the **Type** drop-down list.
  - d. Select the dashboard you want to add from the **URL** drop-down list.
  - e. Fill out the form, and then click **Save**.
2. Assign the dashboard to a role:
  - a. In OPERA Reporting and Analytics, click **Admin**, click **Portal**, click **Roles**, and then click **Portlets**.
  - b. Select the role, click **Configure**, and then click **Add**.
  - c. Select the dashboard portlet from the **Portlet** drop-down list.
  - d. Fill out the form, and then click **Save**.
  - e. Members of the role can access the dashboard the next time they log into the system.