Oracle® Fusion Applications

Reporting and Analytics Handbook Release 11.1.6

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August 2013

Explains how to use Oracle Fusion Applications to perform current state analysis of business applications.



Oracle Fusion Applications Reporting and Analytics Handbook, Release 11.1.6

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Preface

Oracle Fusion Applications is a complete set of applications for performing business tasks across your enterprise. These applications are based on business process models. Many of the common features and functionality are available to all users, while others are available in select pages or flows.

Part of the Oracle Fusion Applications offering is an ad-hoc query and self-service reporting solution that provides an easy to use interface for business users to perform current state analysis of their business applications.

This guide contains information about using Oracle Fusion Applications to perform current state analysis of business applications.

Audience

This document is intended for users of Oracle Fusion Applications who want to perform current state analysis of their business applications.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit

http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

Related Documents

For more information, see the following documents in the Oracle Fusion Applications documentation set:

- Oracle Fusion Transactional Business Intelligence User's Guide
- Oracle Fusion Applications Common User Guide

Conventions

The following text conventions are used in this document:

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
monospace	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

Part I

Viewing, Modifying, and Creating Reports

This Part describes how to answer business questions related to viewing, modifying, and creating reports.

How Do I Create a New Report?

This tutorial shows you how to create a new Fusion report. A Fusion report is based on an "analysis" that defines the information you want to see in the report. So to create a new Fusion report, you first need to create an analysis. The folder in which you save the analysis controls whether it is only available for your personal use, or whether other people can use the analysis.

How to Create a New Report

1. From the Navigator menu, select **Reports and Analytics**.



The Reports and Analytics page is displayed.

2. Click **Create** and select **Analysis**.



The Select Subject Area list is displayed.

3. Select a subject area.

For example, select the Sales - CRM Pipeline subject area:



Expand the subject area folder (by clicking the arrow next to the folder) and select the columns to include in the analysis.

For each column that you want to add:

- Select the column in the Subject Areas list.
- Click the **Add** button (the right arrow button to the right of the Subject Areas list) to move it to the Selected Columns list.

For example, suppose that you want to create an analysis that shows opportunities by sales stage. Select the following columns from the Subject Areas list and move them to the Selected Columns list:

```
From the Employee folder: Employee Name
From the Opportunity Name folder: Opportunity Name, Sales Stage Name, and
From the Facts/Pipeline Facts folder: # of Opportunities
```



- Click Next.
- Specify the views (that is, the ways to visually present the data) to include in the analysis. You can include a table, a graph, or both a table and a graph.

The **Table** options include:

- **None** Specifies no table.
- **Table (recommended)** Specifies a table. (This is the recommended table type for nonhierarchical data).
- **Summary Table** Specifies a table that also includes summaries of the data (for example, grand totals).

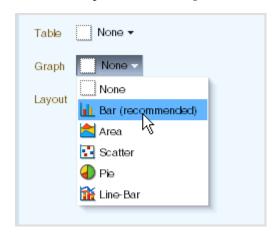
- **Pivot** Specifies a pivot table (recommended for hierarchical data).
- Summary Pivot Specifies a pivot table that also includes summaries of the data (for example, grand totals).

The **Graph** options include:

- **None** Specifies no graph.
- **Bar (recommended)** Specifies a bar graph. (This is the recommended graph type by default.)
- **Area** Specifies an area graph.
- **Scatter** Specifies a scatter graph.
- Pie Specifies a pie graph.
- **Line-Bar** Specifies a line-bar graph.

If you include both a table and a graph, use the **Layout** option to select the placement of the table and graph in the analysis, that is, Table above Graph, Table below Graph, Table to the left of Graph, or Table to right of Graph.

For example, click the **Graph** box and select **Bar** (recommended).



7. In the **Title** field, enter the title.

For example, enter Opportunity Count by Sales Stage.



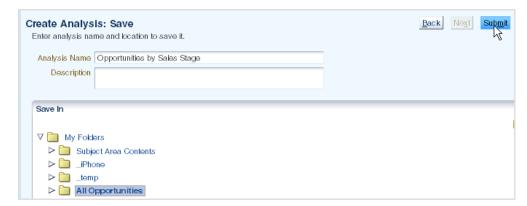
- Click Next.
- Save the analysis as follows:
 - **a.** In the **Analysis Name** field, specify a name for the analysis.
 - **b.** In the Save In list, select the folder in which to save the analysis.

The folder in which you save the analysis controls whether the analysis is available only for your personal use or available to other users.

If you save the analysis in My Folders, then it available only for your personal use. If you save the analysis in Shared Folders/Custom, then it is available to all users who can access Shared Folders/Custom.

c. Click **Submit**, then **OK** in the Confirmation dialog.

For example, select the My Folders/All Opportunities folder, enter Opportunities by Sales Stage as the name and click **Submit**:



Part II

Printing Reports

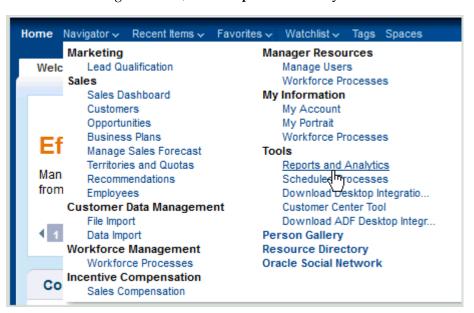
This Part describes how to answer business questions related to printing reports.

How Do I Print a Report?

This tutorial shows you how to print a Fusion report. The type of report shown in this tutorial is an Oracle Business Intelligence analysis.

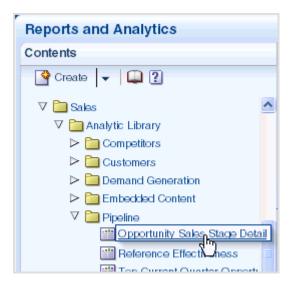
How to Print a Report

1. From the Navigator menu, select **Reports and Analytics**.



The Reports and Analytics page is displayed.

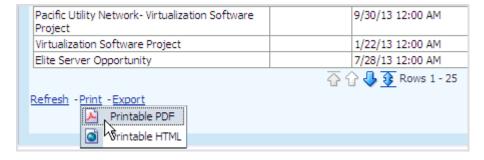
From the Contents pane, navigate to the analysis that you want to print.



Click the analysis and select **View**.



4. Once the analysis is displayed, click the **Print** link, and select **Printable PDF**.



The analysis is shown in PDF format.

Use the print function of your desktop application to print the analysis.

Opportunity Sales Stage Detail

Opportunity Name	Days Stalled	Expected Close Date	# of Days in Current Stage	Average Duration of Stage
Upgrading Network Servers		12/30/12 12:00 AM		8
Seattle DataCenter Opportunity		12/31/12 12:00 AM		10
NorthWest DataCenter		9/29/12 12:00 AM		11
Virtualization Software Project	284	10/8/12 12:00 AM	295	11
Spare Parts for Elite Servers		12/1/12 12:00 AM		12
SAN Server Replacement		11/30/12 12:00 AM		12
Annual Server Maintanence		9/25/12 12:00 AM		12

How to Print a Report	How	to	Print	а	Report
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Part III

Exporting Reports

This Part describes how to answer business questions related to exporting reports.

How Do I Export a Report to Microsoft Excel?

This tutorial shows you how to export the results of a report to Microsoft Excel. The type of report shown in this tutorial is an Oracle Business Intelligence analysis.

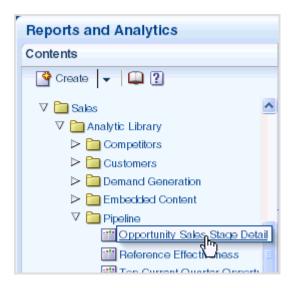
How to Export a Report to Microsoft Excel

1. From the Navigator menu, select **Reports and Analytics**.



The Reports and Analytics page is displayed.

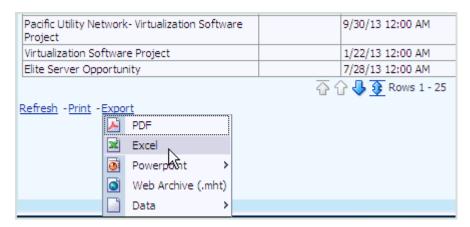
From the Contents pane, navigate to the analysis that you want to export.



Click the analysis and select **View**.



4. Once the analysis is displayed, click the **Export** link and select **Excel**. In the dialog that is displayed, click **OK** to open the worksheet.



The analysis is exported to Microsoft Excel (.xls file format).



5. In Microsoft Excel, save the file to the desired location.

How to Export a Report to Microsoft Exce	How to E	xport a	Report	to	Microsoft	Exce
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Part IV

Scheduling And Sharing Reports

This Part describes how to answer business questions related to scheduling and sharing reports.

How Do I Schedule a Report for Distribution?

You can schedule reports to be automatically sent to groups or individual users, so that you and those you work with receive necessary information in a timely manner. The type of report that you can schedule is an Oracle Business Intelligence analysis.

During the scheduling of a analysis for distribution, you can specify:

- How the analysis is generated: does it contain the same data for everyone or data specific to the recipient
- When the analysis is generated
- To whom the analysis is sent
- How is it sent (such as email, mobile device, or dashboard)

How to Schedule a Report for Distribution

The procedure to schedule a analysis for distribution involves:

- Selecting the Report to Schedule
- Creating the Scheduled Distribution

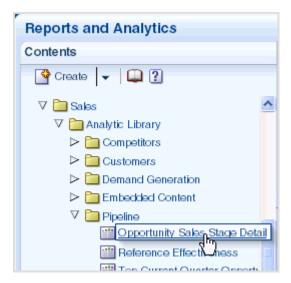
Selecting the Report to Schedule

From the Navigator menu, select **Reports and Analytics**.



The Reports and Analytics page is displayed.

2. From the Contents pane, select the analysis that you want to schedule for automatic distribution.

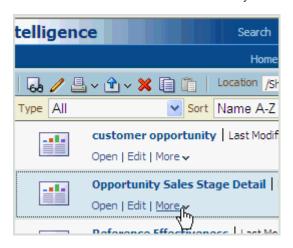


3. Select **More** from the menu.

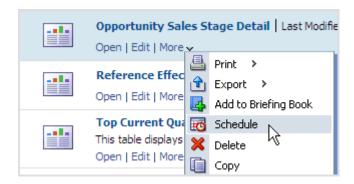


A new browser window or tab is displayed that contains the Oracle BI Presentation Catalog.

4. Select the **More** link below the analysis that you want to schedule for distribution.



Select Schedule.



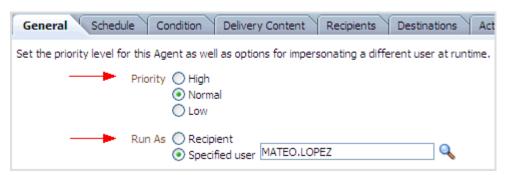
The Agent editor is displayed.

Creating the Scheduled Distribution

Once you've selected the analysis to schedule, you're now ready to create the distribution schedule. During this process, you will create an agent that generates the analysis with the configured options that you specify.

Set General Options

In the General tab of the Agent editor, use the **Priority** option to select the priority for the agent. (**Normal** is the default and is appropriate for most instances).

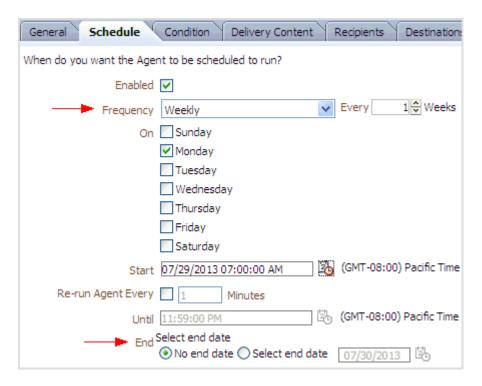


- Specify how the analysis should be generated by selecting one of the following from the **Run As** option:
 - **Recipient**: Generates the analysis with data specific to the recipient.
 - **Specified User**: Generates the analysis with data specific to the specified user. If you select this option, specify the user in the box to the right of the option by clicking the Set User button to display the Select User dialog, where you can select a user.

Note: Selecting **Run As** is a great way to ensure that multiple users receive a consistent view of data, regardless of the recipient. For example, if you want your users to receive a Pipeline analysis for an entire territory, you would run the analysis as the Territory Manager.

Create Schedule

1. Click the Schedule tab.



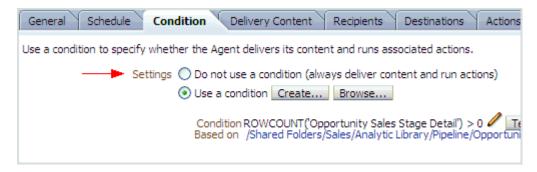
Select how often you would like to generate the scheduled analysis from the Frequency box.

Note that the available scheduling options depend on the frequency.

- Specify the length of time that you want the scheduled analysis to run using the **End** radio buttons:
 - No End Date: Runs the scheduled job perpetually until the agent is disabled or deleted.
 - **Select End Date**: Allows you to select a specific end date.

Specify Conditions

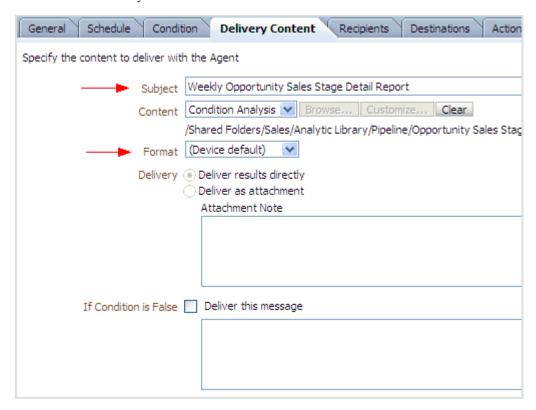
1. Click the Condition tab.



Specify whether the agent always delivers the analysis, or conditionally delivers the analysis. This tutorial utilizes the default condition that is created on your behalf, and it is not necessary to configure any additional conditions for this example.

Configure Delivery Content

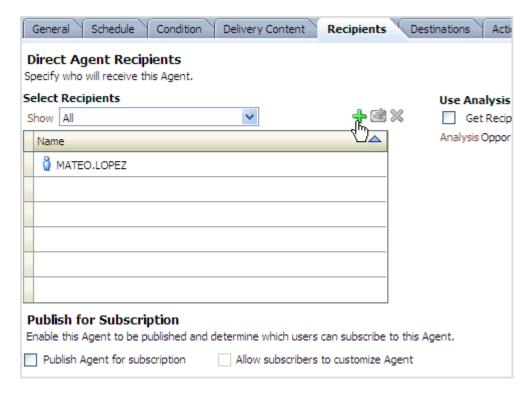
1. Click the Delivery Content tab.



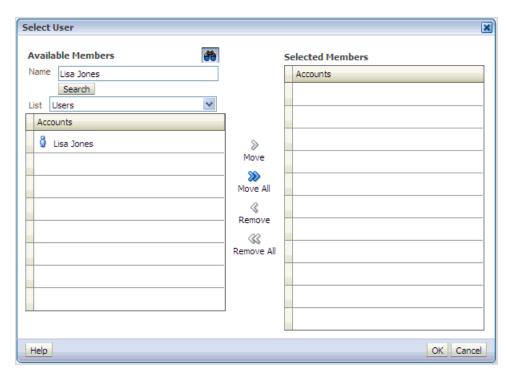
- **2.** Enter a text description for this agent in the **Subject** box.
 - This text, for example, is used as the subject line when your recipients receive an email containing a scheduled analysis.
- **3.** Ensure that **(Device Default)** is selected from the **Format** box. This ensures that recipients receive the most appropriate format for their preferred delivery method.

Select Recipients

1. Click the Recipients tab.



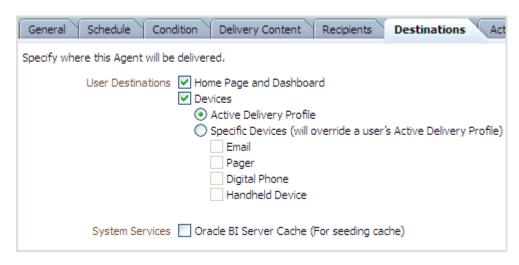
- **2.** Click the **Add Recipient** (+) button to add additional users to the automatic distribution. The Select User dialog is displayed.
- **3.** Select what you want to add to the distribution from the **List** box:
 - **Application Roles**
 - **Catalog Groups**
 - Users
 - All



- Enter a user name or email or an application role or catalog group name in the Name field and click the Search button.
- 5. Select the accounts, roles, or groups that you want to add to the distribution and click the Move or Move All button.
- Click **OK**.

Configure Destination

1. Click the Destinations tab.



Specify where the analysis is to be delivered. For most cases, you will use the defaults so that the analysis is delivered to the recipient's dashboard and to the devices specified in the recipient's delivery profile.

Complete Configuration

At this point, you have completed configuring a basic agent to automatically generate and distribute a selected analysis to a specified set of users, groups, or roles.

1. Click the **Save** button to save the agent.



The agent is now configured and the job is now running and will deliver the selected analysis to the selected users when the next scheduled interval occurs.

How Do I Embed a Report in a Sales **Dashboard?**

This tutorial shows you how to embed a report in a sales dashboard. The type of report shown in this tutorial is an Oracle Business Intelligence analysis.

How to Embed a Report in a Sales Dashboard

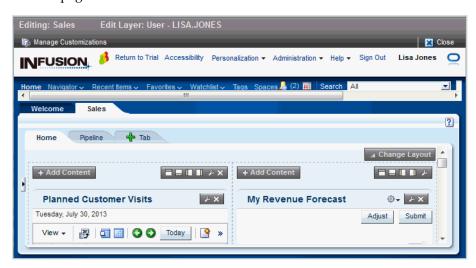
1. From the Navigator menu, select Sales Dashboard.



- Go to the Sales tab.
- Click **Personalization** and select **Edit Current Page**.



The page is now in Edit mode.



- (Optional) To create a new tab to embed an analysis:
 - **a.** Click the green plus sign to create a new untitled tab.
 - **b.** Enter a name for the untitled tab.



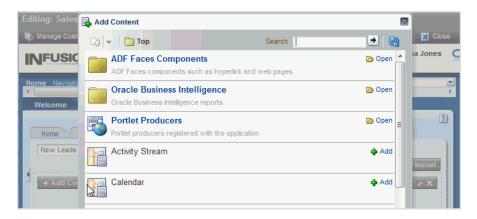
In this example, the name is New Leads.

- **c.** Click **Rename this tab** to save the name.
- (Optional) Click **Change Layout** to select a layout for the new tab (two-column, three-column, and so on).

Note: A single- or double-column layout provides a wide enough view for reports.

- To add an analysis to a tab:
 - Click **Add Content** in the page location where you want to display the analysis.

The Add Content search list is displayed.



Click the Oracle Business Intelligence folder, and navigate to an appropriate folder containing the analysis that you want to add.

For example, open the Shared Sales Reports folder, and then the Opportunity and Revenue Management folder.

Click **Add** next to the analysis you want to add.

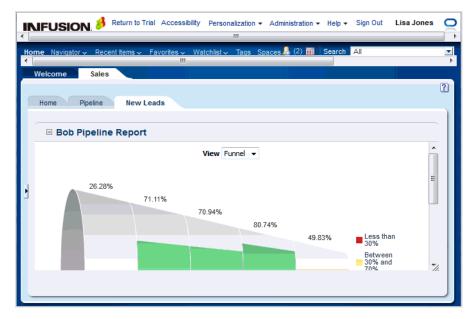
For example, add the Bob Pipeline Report.



Click the cross in the upper right corner to close the search list. To add an additional analysis, repeat steps a to d.

e. Click **Close** to save the changes and exit Edit mode.

The analysis is added to the page.



How to Embed a Report in a Sales Dashboard
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Part V

Accessing Reports On Mobile Devices

This Part describes how to answer business questions related to accessing reports on mobile devices.

How Can I View Analytics with a Mobile **Device?**

This tutorial shows you how to view Oracle Fusion analytics on a mobile device.

Users of Oracle Fusion Applications can access, on their iOS, BlackBerry, and Android mobile devices, all the same analytics available in the web application. To view Oracle Fusion reports, you need to view Oracle BI analyses. You can view standard analyses that come predefined within Oracle Fusion Applications, and you can also view additional, custom analyses of your choosing.

Oracle Fusion Mobile Sales allows you to view business intelligence in the context of your other sales data, including your leads, your opportunities, and so on.

Oracle Tap allows you to view business intelligence analyses that have been associated to a KPI, that in turn you have added to Oracle Tap.

How to View Analytics on a Mobile Device

- **1.** Get your preferred mobile application:
 - For iOS devices (iPhone or iPad), install Oracle Fusion Mobile Sales from the Apple App Store.



For Android devices, install Oracle Fusion Mobile Sales from Google Play.



For Blackberry devices, install Oracle Fusion Mobile Sales through a local server link in a format similar to this example:

https://host:port/sales/faces/MobileInstallerMain

The exact URL is provided to you by your administrator. When opened in a browser, the link takes you to an installation page.

For the iPad, you can also install Oracle Tap from the Apple App Store. Use Oracle Tap to view key performance indicators (KPIs)—in both CRM analyses and HCM analyses.

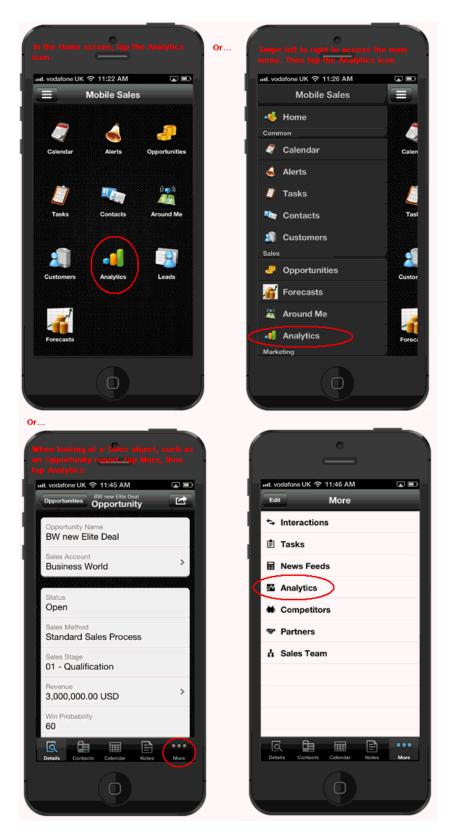


- **2.** Log in to the mobile application as follows:
 - For Oracle Fusion Mobile Sales, use your Oracle Cloud Service username and password, and enter the server details for your Oracle Fusion server. This takes the form of a host URL, such as crm-sales.example.com. The host is specific to your company instance and must be provided by your administrator.
 - If you are unsure how to determine your host URL, see the Rollout Guide within the Rollout Kit. In the Knowledgebase on MyOracle Support, search on "1540393.1" to access the Rollout Kit for Oracle Fusion Mobile Sales.
 - For Oracle Tap, use your Oracle Cloud Service username and password, and enter the server details for your Oracle Fusion CRM or Oracle Fusion HCM server. Use the server URL format shown in the table that follows.

Application	Server URL	Example URLs
CRM	https://[crm-server]/sales/rest/v1	https://crm-aufsn4x0[POD Id].oracleoutsourcing.com/sales/rest/v1
		https://[POD Id].crm.em2.oraclecloud.com/sales/rest/v 1
HCM	https://[hcm-server]/hcmCoreSetup/rest/v1	https://hcm-aufsn4x0[POD Id].oracleoutsourcing.com/hcmCoreSetup/r est/v1
		https://[POD Id].hcm.em2.oraclecloud.com/hcmCoreSetup /rest/v1

Note: If you do not want to log in right away, you can try Oracle Mobile Sales and Oracle Tap using the Demo mode.

- **3.** Explore. Both Oracle Fusion Mobile Sales and Oracle Tap offer navigation tours when you launch the application.
 - In Oracle Fusion Mobile Sales, tap and swipe to access BI analyses in any of these ways:
 - The **Analytics** icon from the home page.
 - The **Analytics** icon from the main menu. Access the main menu by swiping left to right from the springboard page.
 - The Analytics link from the related objects for a Sales object. For example, an Opportunity analysis.



In Oracle Tap, access BI analyses through the shuttle menu by doing this:

Tap Performance Indicators, then tap the relevant Key Performance Indicator (KPI). Next, tap the analysis that is displayed under the Analysis section.







How to Add Analytics to Oracle Mobile Sales for Viewing on a Mobile **Device**

This tutorial explains how to "make mobile" any of your analyses that are not already visible to you in your Oracle Mobile Sales or Oracle Tap applications. This tutorial is organized as follows:

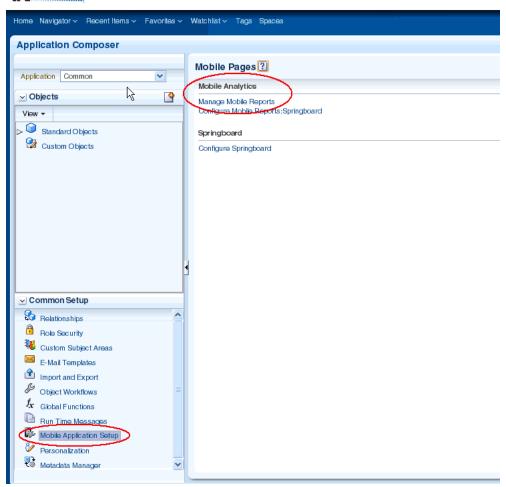
- "How to Add Analytics to Oracle Mobile Sales"
- "How to Add Analytics to Oracle Tap"

How to Add Analytics to Oracle Mobile Sales

Users of Oracle Fusion Applications can add BI analyses to Oracle Mobile Sales so that the analyses are visible on the Oracle Mobile Sales home page.

Whether you are making mobile an analysis you have created, or an existing analysis from the analytics that come predefined with Fusion Applications, you use the Mobile Application Setup page in the Application Composer.

INFUSION



Adding an analysis to Oracle Mobile Sales is explained in detail in the Rollout Guide for Oracle Fusion Mobile Sales. The Rollout Guide is part of the Rollout Kit for Oracle Fusion Mobile Sales [Document ID 1540393.1 on https://support.oracle.com/]

On the mobile device, your analysis is rendered in an embedded web view.

How to Add Analytics to Oracle Tap

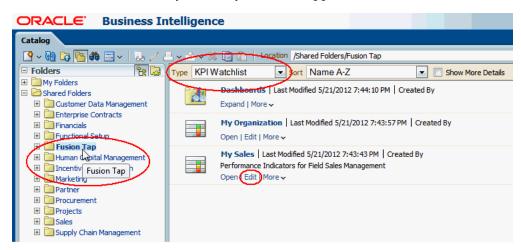
The BI analyses that users of Oracle Fusion Applications view in Oracle Tap are accessible because they have been added to a special Oracle Tap watchlist in Oracle Business Intelligence.

If you want to add analytics that are not already visible to users of Oracle Tap, this tutorial can help you.

To display Oracle Fusion Tap Key Performance Indicators on users' tablet devices, you must add KPIs to an existing watchlist. First you locate the Oracle Fusion Tap Watchlists folder. Then you edit the watchlist called "Oracle Fusion Tap Watchlist."

Note: Make sure you have the necessary privileges to edit KPI Watchlists. Users with the Business Intelligence Consumer role, or the Business Intelligence Author role, can edit KPI Watchlists by default. If required, the Watchlist editing privilege can be allocated to other roles by your applications administrator.

- 1. Locate the Oracle Fusion Tap Watchlists by doing the following:
 - Log in to Oracle Business Intelligence.
 - In the global header, click **Catalog**.
 - In the Folders pane, expand the Shared Folders folder.
 - In the **Type** list, select KPI Watchlist.
 - Select the Watchlist you want your KPI to appear under, and click **Edit**.



- Edit the KPI Watchlist as follows:
 - In the Performance tab, in the **Objects** list, click **Add KPI**.
 - In the Select a KPI dialog, locate the KPI you want to add to the Watchlist, select it and click **OK**.



Your Oracle Fusion Tap KPI is now available to view under the relevant KPI Watchlist on users' tablet devices.

Where to Find More Information About Oracle Fusion Mobile Applications

For Oracle Fusion Mobile Sales, see:

- In the Knowledgebase on MyOracle Support, search on "1540393.1" to access the Rollout Kit for Oracle Fusion Mobile Sales. This kit includes a *Quick Guide* for end users, in addition to videos and other useful information.
- In Oracle Fusion Applications Help, search on "mobile" to find FAQs, examples, and other help topics related to Oracle Fusion Mobile Sales.
- In Oracle Fusion Applications Help, search on "intelligence" to find FAQs, examples, and other help topics related to analytics in Oracle Fusion Applications.
- The Oracle Learning Library at http://docs.oracle.com/cd/E37187_01/use.htm For more information on Oracle Tap, see:
- The "Getting to Know Tap" navigation tour that you can access in the mobile application when you begin navigating to your business area. Tap the **Tour** button.
- Oracle Tap for Oracle Applications Capabilities and Installation Guide
- In the Knowledgebase on MyOracle Support, search on "Oracle Tap" to find FAQs and how-to information.

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