

# Oracle® Cloud

## Reference for Fusion CX Analytics



F90479-02  
March 2024



Oracle Cloud Reference for Fusion CX Analytics,

F90479-02

Copyright © 2022, 2024, Oracle and/or its affiliates.

Primary Author: Jenny Smalling

Contributors: Oracle Fusion Analytics Warehouse development, product management (contributor), and quality assurance teams

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

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

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

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

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

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

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

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

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>.

# Contents

	<b>Preface</b>	
	<hr/>	
	Audience	vi
	Diversity and Inclusion	vi
	Documentation Accessibility	vi
	Related Documentation	vii
	Conventions	vii
<b>1</b>	<b>Introduction</b>	
	<hr/>	
	Overview	1-1
	Features Available for Preview	1-1
	Prerequisites for Oracle Fusion CX Analytics	1-2
<b>2</b>	<b>Tables</b>	
	<hr/>	
	Overview	2-1
	Tables Without WHO Columns	2-1
<b>3</b>	<b>Relationship Diagram</b>	
	<hr/>	
	Overview	3-1
<b>4</b>	<b>Data Store</b>	
	<hr/>	
	Overview	4-1
<b>5</b>	<b>Data Lineage</b>	
	<hr/>	
	Overview	5-1

## 6 Data Augmentation

---

Overview	6-1
----------	-----

## 7 Subject Areas

---

Subject Areas	7-1
Overview	7-1
Offerings and Functional Areas	7-1
Security Assignment	7-4
Security Audit History	7-4
Usage Tracking	7-5
Warehouse Refresh Statistics	7-6
Business Questions	7-6
Overview	7-7
Job-Specific Groups	7-7
Overview	7-7
Common Job-Specific Groups	7-34
Data Roles	7-34
Overview	7-34
Duty Roles	7-35
Overview	7-35
Common Duty Roles	7-42
Subject Area Metric Details	7-42
CX - Activity	7-43
CX - Campaign Activity Analysis	7-43
CX - Campaign Activity Detail Analysis	7-45
CX - Campaign Members	7-46
CX - Campaign Opportunity Revenue	7-46
CX - Lead Activity	7-50
CX - Leads	7-51
CX - Opportunity	7-53
CX - Opportunity Activity	7-57
CX - Opportunity Quote	7-59
CX - Opportunity Quote Lines	7-61
CX - Opportunity Revenue Line	7-62
CX - Opportunity Revenue Line Snapshot	7-66
CX - Opportunity Snapshot	7-70
CX - Opportunity Stage Progression	7-73
CX - Service Request	7-73
CX - Service Request Lifecycle	7-75
CX - Service Request Milestone	7-81

CX - Subscription Bill Line	7-82
CX - Subscription Historical Trend	7-83
CX - Subscriptions	7-86

## 8 Prebuilt

---

Overview	8-1
Prebuilt Analyses	8-1
Activity Management	8-1
Lead Management	8-2
Marketing Campaigns	8-3
Opportunity Management	8-3
Quote and Order Capture	8-5
Service Request Management	8-6
Subscription Management	8-6
Marketing Campaigns	8-6
Prebuilt Business Metrics	8-7
Overview	8-7
Activity Management	8-8
Lead Management	8-8
Marketing Campaigns	8-9
Opportunity Management	8-10
Subscription Management	8-12
Quote and Order Capture	8-12
Service Request Management	8-13
Prebuilt Dashboards	8-13
Overview	8-13
Prebuilt Dashboards	8-14

## A Report Authoring Tips

---

Common Report Authoring Tips	A-1
Report Authoring Tips for Oracle Fusion CX Analytics	A-2

## B Frequently Asked Questions

---

# Preface

**Topics:**

- [Audience](#)
- [Documentation Accessibility](#)
- [Diversity and Inclusion](#)
- [Related Documentation](#)
- [Conventions](#)

## Audience

This document is intended for Oracle Fusion Analytics Warehouse consumers and authors using the Services to run a business.

## Diversity and Inclusion

Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we are working to remove insensitive terms from our products and documentation. We are also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

## 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 that have purchased support 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 Documentation

These related Oracle resources provide more information.

- Oracle Cloud <http://cloud.oracle.com>
- Administering Oracle Fusion Analytics Warehouse
- Using Oracle Fusion Analytics Warehouse
- Visualizing Data and Building Reports in Oracle Analytics Cloud

## Conventions

The following text conventions are used in this document.

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

# 1

## Introduction

### Overview

Oracle Fusion CX Analytics is a prebuilt, cloud native analytics application that provides sales, marketing, service, and finance line-of-business users with ready-to-use insights to improve decision-making.

It helps break down the data silos between sales, marketing, and service by enabling a customer-centric view of all revenue generation activities. This application helps achieve full revenue potential by combining sales, marketing and service data in a unified analytic solution. Oracle Fusion CX Analytics comes with prebuilt data pipelines to Oracle CX Cloud applications, which helps reduce complexity and ensure a consistent, accurate view of business-critical data, in familiar business terms for end users. Without having to code, the customer experience teams can enrich their analytics using embedded machine learning (ML) and additional data from other sources beyond Oracle Fusion Cloud Applications. Oracle Fusion CX Analytics supports an analytics-driven business culture with a platform that addresses the needs of the entire analytics workflow. Self-service data preparation capabilities permit business users across departments to access, combine and leverage all relevant data. See [Oracle Fusion CX Analytics](#).

This guide lists the predefined objects in Oracle Fusion CX Analytics. You can find information about tables, entity relationships, subject area, job roles, duty roles, associated business questions, metric details, prebuilt analyses, prebuilt business metrics, and prebuilt dashboards.

### Features Available for Preview

Preview features enable functional administrators to switch functionality on and off. This way, your organization can evaluate and learn how to use new features before they roll out by default.

To enable the preview features, see [Make Preview Features Available](#).

#### Functional Areas

Feature	Description
Subscription Historical Trends	Enables Subscription Management Snapshot functional area offering in Oracle Fusion CX Analytics.
CX Resource HCM Worker Analytics	Enables cross pillar analytics between Fusion CX Analytics and Fusion HCM Analytics applications by helping join Resource (CX) and Worker dimensions (HCM).
Enable Opportunity Date Change Tracker	Tracks change in Expected Close Date and Revenue of an Opportunity.



---

Feature	Description
Marketing Campaign Contact Detail Analytics	Enables Eloqua Campaign Activity reporting at Contact and Asset grain.

---

## Prerequisites for Oracle Fusion CX Analytics

Be sure you review and set up these prerequisite requirements to use Fusion CX Analytics and the provided subject areas.

1. Configure and schedule the Sale Historical Snapshots to get daily snapshots of the Sales Pipeline such as the snapshots of opportunity and revenue trends over time. This configuration works for the Sales Pipeline Snapshot functional area and the CX - Opportunity Snapshot, CX - Opportunity Revenue Line Snapshot, and CX - Opportunity Stage Progression subject areas in Oracle Fusion CX Analytics. See [Schedule Snapshots of Your Sales Historical Pipeline](#).
2. (Optional) Set up the integration between Oracle Eloqua and Oracle Cloud CX to share data between the two platforms. See [Oracle CX Sales Integration app](#).
3. (Optional) Set up the integration between Oracle Cloud CX and Oracle Configure, Price, Quote (CPQ) to configure a solution that combines the power of these applications, while reducing the cost of ownership and the time needed to deploy the application. The integration ensures that the:
  - Sales forecasts are reliable and based on real-world quotes
  - Sales orders are valid and contain the correct billing and shipping details to eliminate costly change orders
  - Sales receive the quote data that enables businesses to analyze and improve the overall efficiency of their sales teams

The integration between Oracle Cloud CX and Oracle Configure, Price, Quote supports standard B2B selling processes, which feature highly configurable products, variable or dynamic pricing models, discount negotiations requiring executive approval, and large, branded sales documents. See [Overview of the Oracle Sales and Oracle CPQ Integration](#).

4. To ensure the resource hierarchy works in the subject area, ensure the Reporting Hierarchy Generation ESS job is scheduled in Oracle Fusion Cloud Sales Automation. See [Run Processes to Complete Resource and Resource Hierarchy Creation](#).

# 2

## Tables

### Overview

This section provides information about tables within Oracle Fusion CX Analytics warehouse and their columns, primary keys denoted as key columns, data types, and the referred table and column names.



#### Note:

Tables ending with the suffix `_EN` and those listed in **Tables Without WHO Columns** are for Oracle Internal use only. In addition, tables storing descriptive flexfield data (DFF tables) aren't included in the documentation

Download this [ZIP file](#) that contains available tables that apply to the current version of Oracle Fusion CX Analytics . Once the file downloads, extract the file, open the folder, and then open the release-specific HTML file. For example, click **24R1\_Fusion\_CX\_Analytics\_Tables.html**.

#### Table Types

The suffixes in table names designate the table type.

- CA, A: Aggregate
- CF, F: Fact
- CF\_DN: Denormalized Fact
- CG, G: General
- D: Dimension
- DH: Dimension Hierarchy
- EF: Extended Fact
- EN: Oracle internal use only
- H: Helper
- P: Prediction
- TL: Translation

### Tables Without WHO Columns

All tables have two system date columns which can be used to get the last refresh dates.

The following views based on the data warehouse tables don't have the WHO columns:

- DW\_INV\_ORGANIZATION\_D\_TL
- DW\_BUSINESS\_UNIT\_D\_TL
- DW\_FISCAL\_QUARTER\_ACCT\_D
- DW\_FISCAL\_YEAR\_ACCT\_D
- DW\_FISCAL\_DAY\_D\_NO\_ADJUST
- DW\_FISCAL\_PERIOD\_ACCT\_D
- DW\_FISCAL\_DAY\_ACCT\_D
- DW\_BUSINESS\_UNIT\_D
- DW\_INV\_ORGANIZATION\_D

# 3

## Relationship Diagram

### Overview

This chapter provides diagrams that define the logical relationship of a Fact table with different dimension tables.

Download this [ZIP file](#) that contains available diagrams that apply to the current version of Oracle Fusion CX Analytics. Once the file downloads, extract the file, open the folder, and then open the release-specific HTML file. For example, click **[24R1\\_Fusion\\_CX\\_Analytics\\_Diagrams.html](#)**.

# 4

## Data Store

### Overview

Enrich your reports by choosing specific columns from various view objects (VOs) from the Oracle Fusion Cloud Applications data sources.

Enrich your reports by choosing specific columns from various view objects (VOs) from the Oracle Fusion Cloud Applications data sources. You can select the columns from various VOs, create an enrichment dataset, and use that dataset to create a data pipeline activation plan. This enables you to seamlessly extract and load data from additional Oracle Fusion Cloud Applications VOs and make it readily available in the autonomous data warehouse tables. You can then use the data for visualization and analysis.

#### **Data Store Spreadsheet**

Use this [spreadsheet](#) that contains available Fusion CX Analytics BI View Objects for extraction using Data Enrichment in Oracle Fusion Analytics Warehouse.

# 5

## Data Lineage

### Overview

The Customer Experience Semantic Model Lineage spreadsheet and Metric Calculation Logic spreadsheet for Oracle Fusion CX Analytics provides an end-to-end data lineage summary report for physical and logical relationships in your data.

You can select the subject area for each of the Fusion Analytics Warehouse products and review the data lineage details. This enables you to understand the column and table lineage from the presentation layer to the physical layer.

#### **Data Lineage Spreadsheet**

Use this [spreadsheet](#) that contains Fusion Customer Experience Data Lineage details.

#### **Customer Experience Metric Calculation Spreadsheet**

Use this [spreadsheet](#) that contains Fusion Customer Experience Metric Calculation details.

# 6

## Data Augmentation

### Overview

Entities are key concepts or building blocks for implementing business processes in any of the Fusion Applications. Oracle Fusion Analytics Warehouse extracts data for key entities and makes the data available in analysis-friendly data models (tables). Internally, Oracle Fusion Analytics Warehouse keeps track of the tables that capture entity details, as well as tables with references for entities. When the data augmentation framework adds attributes that aren't part of the predefined data model, users see the new information as new attributes associated with the relevant tables. The Entity ID is the set of unique attributes that identifies the entity.

#### **Data Augmentation Spreadsheet**

Use this [spreadsheet](#) that contains Entities and Entity ID mapping details for CX. Select "Entity" in the Data augmentation flow.

# 7

## Subject Areas

### Subject Areas

This chapter provides information on the subject areas with data you maintain in Oracle Analytics for Advertising and Customer Experience (CX). These subject areas, with their corresponding data, are available for you to use when creating and editing analyses and reports. The information for each subject area includes:

This section provides information on the subject areas with data you maintain in Oracle Fusion CX Analytics. These subject areas, with their corresponding data, are available for you to use when creating and editing analyses and reports. The information for each subject area includes:

- Description of the subject area.
- Business questions that can be answered by data in the subject area, with a link to more detailed information about each business question.
- Job-specific groups and duty roles that can be used to secure access to the subject area, with a link to more detailed information about each job role and duty role.
- Primary navigation to the work area that is represented by the subject area.
- Time reporting considerations in using the subject area, such as whether the subject area reports historical data or only the current data. Historical reporting refers to reporting on historical transactional data in a subject area. With a few exceptions, all dimensional data are current as of the primary transaction dates or system date.
- The lowest grain of transactional data in a subject area. The lowest transactional data grain determines how data are joined in a report.
- Special considerations, tips, and things to look out for in using the subject area to create analyses and reports.

### Overview

This section details subject area information for Customer Experience data using Oracle Fusion CX Analytics.

Download this [ZIP file](#) that contains available subject areas that apply to the current version of Oracle Fusion CX Analytics. Once the file downloads, extract the file, open the folder, and then open the release-specific HTML file. For example, click **24R1\_Fusion\_CX\_Analytics\_SubjectAreas.html**.

### Offerings and Functional Areas

This table shows the offerings in Oracle Fusion CX Analytics and their source.



Offering	Functional Area	Activation Dependency *	Subject Areas Covered	Source	Initial Release
Customer Experience Sales Analytics	Sales Pipeline	None	<ul style="list-style-type: none"> <li>• CX - Opportunity</li> <li>• CX - Opportunity Revenue Line</li> <li>• CX - Activity</li> <li>• CX - Opportunity Activity</li> <li>• CX - Lead Activity</li> <li>• CX - Leads</li> </ul>	Oracle CX Cloud (Fusion Sales)	22R2
Customer Experience Sales Analytics	Sales Pipeline Snapshot	Sales Pipeline	<ul style="list-style-type: none"> <li>• CX - Opportunity Snapshot</li> <li>• CX - Opportunity Revenue Line Snapshot</li> <li>• CX - Opportunity Stage Progression</li> </ul>	Oracle CX Cloud (Fusion Sales)	22R2
Customer Experience Sales Analytics	Sales CPQ Integrated Analytics	Sales Pipeline	<ul style="list-style-type: none"> <li>• CX - Opportunity Quote Line</li> <li>• CX - Opportunity Quote Line</li> </ul>	Oracle CX Cloud (Fusion Sales) <sup>+</sup>	22R2
Customer Experience Marketing Analytics	Marketing Campaign Closed Loop Analytics	Sales Pipeline	<ul style="list-style-type: none"> <li>• CX - Campaign Members</li> <li>• CX - Campaign Opportunity Revenue</li> </ul>	Oracle CX Cloud (Fusion Sales) <sup>#</sup>	22R2

Offering	Functional Area	Activation Dependency *	Subject Areas Covered	Source	Initial Release
Customer Experience Service Analytics	B2B Service Analytics	None	<ul style="list-style-type: none"> <li>• CX - Service Request</li> <li>• CX - Service Request Milestone</li> <li>• CX - Service Request Lifecycle</li> </ul>	Oracle CX Cloud (Fusion B2B Service)	22R2
Subscription Analytics	Subscription Management Analytics	None	<ul style="list-style-type: none"> <li>• CX - Subscriptions</li> <li>• CX - Subscription Bill Line</li> </ul>	Oracle Subscription Management	22R3
Subscription Analytics	Subscription Management Snapshot	Subscription Management Analytics	<ul style="list-style-type: none"> <li>• CX - Subscription Historical Trend</li> </ul>	Oracle Subscription Management	22R3
Customer Experience Marketing Analytics	Marketing Campaign Analytics	None	<ul style="list-style-type: none"> <li>• CX - Campaign Activity Analysis</li> </ul>	Oracle Eloqua**	22R3
Customer Experience Marketing Analytics	Marketing Campaign Activity Detail Analytics	Marketing Campaign Analytics	<ul style="list-style-type: none"> <li>• CX - Campaign Activity Detail Analysis</li> </ul>	Oracle Eloqua**	23R3
Customer Experience Security Configuration	CX Security Data	None	<ul style="list-style-type: none"> <li>• NA</li> </ul>	Oracle CX Cloud (Fusion Sales)	23R3
Customer Experience Sales Analytics	CX Resource HCM Worker Analytics	Sales Pipeline	<ul style="list-style-type: none"> <li>• NA</li> </ul>	Oracle CX Cloud (Fusion Sales)	23R3

\* The functional area listed must be activated.

+ The pipeline or functional area is applicable when there's integration between Oracle Fusion Cloud Sales Automation and Oracle Configure, Price, Quote, otherwise the subject area won't have data.

# The pipeline or functional area is applicable when there's integration between Oracle Fusion Cloud Sales Automation and Oracle Eloqua Marketing Automation, otherwise the subject area won't have data.

\*\* Enable the Odata flag for the Eloqua instance.

## Security Assignment

### Description

Using the Security Assignment subject area, you can create reports about the current security assignments. These reports enable you to track the security contexts and the users who have access to the security contexts.

### Business Questions

This subject area can answer the following business questions:

- What is the total number of security contexts?
- What is the number of users by security context?
- Which user is assigned to which security context and when was the assignment done?

### Duty Roles

The Security Reporting Duty role secures access to this subject area. See [Common Duty Roles](#).

### Primary Navigation

Folder: /Shared Folders/Common/Security Assignment

Workbook: Security Audit

### Special Considerations

None.

## Security Audit History

This section is applicable for CX Subscription Management Analytics only.

### Description

Using the data in the Security Audit History subject area, you can create reports to track assignment of users to groups, groups to roles, and security context members to users.

### Business Questions

This subject area can answer the following business questions:

- When was a group created?
- When was a role created?
- When was a user assigned to or removed from a group?
- When was a user assigned to or removed from a role?
- When was a user assigned to or removed from a security context?

**Duty Roles**

The Security Reporting Duty role secures access to this subject area. See [Common Duty Roles](#).

**Primary Navigation**

Folder: /Shared Folders/Common/Security Audit History

Workbook: Security Audit

**Special Considerations**

None.

## Usage Tracking

**Description**

Usage Tracking is a powerful feature that has been available in Oracle Analytics Cloud. In Oracle Fusion Analytics Warehouse you can track usage to determine which user queries are creating performance bottlenecks, based on query frequency and response time. Administrators set up the criteria to track user queries and generate usage reports that you can use in a variety of ways such as reports optimization, user session strategies, or plan usage by users, and departments based on the resources that they consume. When reviewing the business metrics, it is important to keep the usability considerations in mind including trends, slice-and-dice, and drilldowns. Where applicable, benchmark information showcasing performance with the peer group is available. Companies typically set strategic quarterly goals in terms of key metrics; where applicable, the business metrics show progress towards such goals.

**Business Questions**

This subject area can answer the following business questions:

- What are the average queries ran by the user by month?
- How many number of user sessions were created per month?
- How many distinct queries were run per month?
- How many distinct users used the system?
- How many distinct users used the system in a week?
- What are the average queries ran by the user in a week?
- How many logical queries ran by the top users?

**Duty Roles**

The Usage Tracking Analysis Duty role secures access to this subject area. See [Common Duty Roles](#).

**Primary Navigation**

Folder: /Shared Folders/Common/Usage Tracking

Workbook: Usage Tracking

### Special Considerations

None.

## Warehouse Refresh Statistics

### Description

The Warehouse Refresh Statistics subject area provides valuable information on pipeline activity and performance. You can use this subject area to create analytics on data refreshes, pipeline jobs, job failures, and details on rejected records. Together with data validation, this subject area helps reconcile data between the Oracle Fusion Cloud Applications source module and Oracle Fusion Analytics Warehouse, and improve data quality over time.

### Business Questions

This subject area can answer the following business questions:

- When was the warehouse last refreshed, by each module?
- Which modules have high percentage of rejected records?
- What are the specific records that have been rejected for a certain module?
- What errors did the pipeline encounter, by specific jobs?
- Which jobs fail most frequently?
- What are the cascading effects, for example what other related records also fail due to a certain failure of a job?

### Duty Roles

The Data Warehouse Refresh Analysis Duty role secures access to this subject area. See [Common Duty Roles](#).

### Primary Navigation

Folder: /Shared Folders/Common/Warehouse Refresh Statistics

Workbook: Warehouse Refresh Statistics

### Special Considerations

None.

## Business Questions

For each business question in this section, links are provided for more detailed information about the subject areas, job-specific groups, and duty roles associated with the business question.

## Overview

For each business question in this section, links are provided for more detailed information about the subject areas, job-specific groups, and duty roles associated with the business question.

Download this [ZIP file](#) that contains available business questions that apply to the current version of Oracle Fusion CX Analytics. Once the file downloads, extract the file, open the folder, and then open the release-specific HTML file. For example, click [24R1\\_Fusion\\_CX\\_Analytics\\_BQs.html](#).



### Note:

Job roles are the same as job-specific groups.

## Job-Specific Groups

### Overview

This section provides job-specific groups that can be used to secure access to the subject area.



### Note:

Job roles are the same as job-specific groups.

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_ZBS_SALE S_ADMINISTRAT OR_JOB	Sales Administrator	Sales Administrator Job Group	OA4F_CX_CAM PAIGN_MEMBER S_DUTY OA4F_CX_CAM PAIGN_OPTY_R EVN_DUTY OA4F_CONTEN T_REPORTING_ CONFIG OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY OA4F_CX_LEAD S_DUTY OA4F_CX_SALE S_LEAD_CUSTO M_DATA OA4F_CX_SALE S_LEADS_DATA OA4F_CX_OPTY _ANALYSIS_DUT Y OA4F_CX_SALE S_OPTY_CUSTO M_DATA OA4F_CX_SALE S_OPTY_DATA OA4F_CX_REVN _LINE_ANALYSI S_DUTY OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY OA4F_CX_OPTY _SNP_ANALYSIS _DUTY OA4F_CX_OPTY _PROG_ANALYS IS_DUTY OA4F_CX_SALE S_ACCNT_DATA OA4F_CX_SALE S_ACTIVITY_DU TY OA4F_CX_SALE S_ACTIVITY_AS SIGNEE_DATA OA4F_CX_SALE S_ACTIVITY_DE LEGATOR_DATA	CX Sales

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_SALE S_ACTIVITY_RE S_HIER_DATA	
			OA4F_CX_SALE S_ACTIVITY_CU STOM_DATA	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_CUSTOM_DAT A	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_DUTY	
			OA4F_CX_CAM PAIGN_MEMBER S_CONTENT_D UTY	
			OA4F_CX_SALE S_LEAD_ACTIVI TY_CONTENT_D UTY	
			OA4F_CX_LEAD S_CONTENT_D UTY	
			OA4F_CX_OPTY _ANALYSIS_CO NTENT_DUTY	
			OA4F_CX_REVN _LINE_ANALYSI S_CONTENT_D UTY	
			OA4F_CX_REVN _LINE_SNP_AN	



Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			ALYSIS_CONTE NT_DUTY	
			OA4F_CX_OPTY _SNP_ANALYSIS _CONTENT_DU TY	
			OA4F_CX_OPTY _PROG_ANALYS IS_CONTENT_D UTY	
			OA4F_CX_SALE S_ACTIVITY_CO NTENT_DUTY	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_CO NTENT_DUTY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_C ONTENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_CON TENT_DUTY	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_CONTENT_ DUTY	
			OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_CONTE NT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_CONTE NT_DUTY	
			OA4F_CX_SALE S_PIPELINE_OA C_CONTENT_D UTY	
			OA4F_CX_WIN_ LOSS_OAC_CO NTENT_DUTY	
			OA4F_CX_SALE S_ACTIVITY_OA C_CONTENT_D UTY	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_LEAD S_OAC_CONTE NT_DUTY	
			OA4F_CX_CAM PAIGN_EFFECTI VENESS_OAC_ CONTENT_DUT Y	
			OA4F_CX_OPP ORTUNITY_QUO TES_OAC_CON TENT_DUTY	
			OA4F_CX_SR_M ANAGEMENT_O AC_CONTENT_ DUTY	
			OA4F_CX_RENE WAL_SALES_OA C_CONTENT_D UTY	
			OA4F_CX_LEAD _CONVERSION_ OAC_CONTENT_ _DUTY	
			OA4F_CX_CAM PAIGN_ACTIVIT Y_ANALYSIS_OA C_CONTENT_D UTY	
			OA4F_CX_CAM PAIGN_MEMBER S_OAC_CONTE NT_DUTY	
			OA4F_CX_SALE S_ACTIVITY_OA C_CONTENT_D UTY	
			OA4F_CX_SALE S_LEAD_ACTIVI TY_OAC_CONT ENT_DUTY	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_OA C_CONTENT_D UTY	
			OA4F_CX_LEAD S_OAC_CONTE NT_DUTY	
			OA4F_CX_OPTY _ANALYSIS_OA	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			C_CONTENT_D UTY	
			OA4F_CX_REVN _LINE_ANALYSI S_OAC_CONTE NT_DUTY	
			OA4F_CX_OPTY _SNP_ANALYSIS _OAC_CONTEN T_DUTY	
			OA4F_CX_REVN _LINE_SNP_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_OPTY _PROG_ANALYS IS_OAC_CONTE NT_DUTY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_OA C_CONTENT_D UTY	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_OAC_CONT ENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_OAC _CONTENT_DU TY	
			OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R EVENUE_ANALY SIS_DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R EVENUE_ANALY SIS_CONTENT_ DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R	

<b>Job-Specific Group Code</b>	<b>Job-Specific Group Name</b>	<b>Description</b>	<b>Associated Application Roles</b>	<b>Functional Area</b>
			EVENUE_ANALY SIS_OAC_CONT ENT_DUTY	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_ZBS_SALE S_VP_JOB	Sales VP	Sales VP Job Group	OA4F_CX_CAM PAIGN_MEMBER S_DUTY OA4F_CX_CAM PAIGN_OPTY_R EVN_DUTY OA4F_CONTEN T_REPORTING_ CONFIG OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY OA4F_CX_LEAD S_DUTY OA4F_CX_SALE S_LEAD_CUSTO M_DATA OA4F_CX_SALE S_LEADS_DATA OA4F_CX_OPTY _ANALYSIS_DUT Y OA4F_CX_SALE S_OPTY_CUSTO M_DATA OA4F_CX_SALE S_OPTY_DATA OA4F_CX_REVN _LINE_ANALYSI S_DUTY OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY OA4F_CX_OPTY _SNP_ANALYSIS _DUTY OA4F_CX_OPTY _PROG_ANALYS IS_DUTY OA4F_CX_SALE S_ACCNT_DATA OA4F_CX_SALE S_ACTIVITY_DU TY OA4F_CX_SALE S_ACTIVITY_AS SIGNEE_DATA OA4F_CX_SALE S_ACTIVITY_DE LEGATOR_DATA	CX Sales

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_SALE S_ACTIVITY_RE S_HIER_DATA	
			OA4F_CX_SALE S_ACTIVITY_CU STOM_DATA	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_CUSTOM_DAT A	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_DUTY	
			OA4F_CX_CAM PAIGN_MEMBER S_CONTENT_D UTY	
			OA4F_CX_SALE S_LEAD_ACTIVI TY_CONTENT_D UTY	
			OA4F_CX_LEAD S_CONTENT_D UTY	
			OA4F_CX_OPTY _ANALYSIS_CO NTENT_DUTY	
			OA4F_CX_REVN _LINE_ANALYSI S_CONTENT_D UTY	
			OA4F_CX_REVN _LINE_SNP_AN	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			ALYSIS_CONTE NT_DUTY	
			OA4F_CX_OPTY _SNP_ANALYSIS _CONTENT_DU TY	
			OA4F_CX_OPTY _PROG_ANALYS IS_CONTENT_D UTY	
			OA4F_CX_SALE S_ACTIVITY_CO NTENT_DUTY	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_CO NTENT_DUTY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_C ONTENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_CON TENT_DUTY	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_CONTENT_ DUTY	
			OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_CONTE NT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_CONTE NT_DUTY	
			OA4F_CX_SALE S_PIPELINE_OA C_CONTENT_D UTY	
			OA4F_CX_WIN_ LOSS_OAC_CO NTENT_DUTY	
			OA4F_CX_SALE S_ACTIVITY_OA C_CONTENT_D UTY	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_LEAD S_OAC_CONTE NT_DUTY	
			OA4F_CX_CAM PAIGN_EFFECTI VENESS_OAC_ CONTENT_DUT Y	
			OA4F_CX_OPP ORTUNITY_QUO TES_OAC_CON TENT_DUTY	
			OA4F_CX_SR_M ANAGEMENT_O AC_CONTENT_ DUTY	
			OA4F_CX_RENE WAL_SALES_OA C_CONTENT_D UTY	
			OA4F_CX_LEAD _CONVERSION_ OAC_CONTENT_ _DUTY	
			OA4F_CX_CAM PAIGN_ACTIVIT Y_ANALYSIS_OA C_CONTENT_D UTY	
			OA4F_CX_CAM PAIGN_MEMBER S_OAC_CONTE NT_DUTY	
			OA4F_CX_SALE S_ACTIVITY_OA C_CONTENT_D UTY	
			OA4F_CX_SALE S_LEAD_ACTIVI TY_OAC_CONT ENT_DUTY	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_OA C_CONTENT_D UTY	
			OA4F_CX_LEAD S_OAC_CONTE NT_DUTY	
			OA4F_CX_OPTY _ANALYSIS_OA	



Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			C_CONTENT_D UTY	
			OA4F_CX_REVN _LINE_ANALYSI S_OAC_CONTE NT_DUTY	
			OA4F_CX_OPTY _SNP_ANALYSIS _OAC_CONTEN T_DUTY	
			OA4F_CX_REVN _LINE_SNP_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_OPTY _PROG_ANALYS IS_OAC_CONTE NT_DUTY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_OA C_CONTENT_D UTY	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_OAC_CONT ENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_OAC _CONTENT_DU TY	
			OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R EVENUE_ANALY SIS_DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R EVENUE_ANALY SIS_CONTENT_ DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R	

<b>Job-Specific Group Code</b>	<b>Job-Specific Group Name</b>	<b>Description</b>	<b>Associated Application Roles</b>	<b>Functional Area</b>
			EVENUE_ANALY SIS_OAC_CONT ENT_DUTY	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_ZBS_SALE S_MANAGER_J OB	Sales Manager	Sales Manager Job Group	OA4F_CX_CAM PAIGN_MEMBER S_DUTY OA4F_CX_CAM PAIGN_OPTY_R EVN_DUTY OA4F_CONTEN T_REPORTING_ CONFIG OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY OA4F_CX_LEAD S_DUTY OA4F_CX_SALE S_LEAD_CUSTO M_DATA OA4F_CX_SALE S_LEADS_DATA OA4F_CX_OPTY _ANALYSIS_DUT Y OA4F_CX_SALE S_OPTY_CUSTO M_DATA OA4F_CX_SALE S_OPTY_DATA OA4F_CX_REVN _LINE_ANALYSI S_DUTY OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY OA4F_CX_OPTY _SNP_ANALYSIS _DUTY OA4F_CX_OPTY _PROG_ANALYS IS_DUTY OA4F_CX_SALE S_ACCNT_DATA OA4F_CX_SALE S_ACTIVITY_DU TY OA4F_CX_SALE S_ACTIVITY_AS SIGNEE_DATA OA4F_CX_SALE S_ACTIVITY_DE LEGATOR_DATA	CX Sales

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_SALE S_ACTIVITY_RE S_HIER_DATA	
			OA4F_CX_SALE S_ACTIVITY_CU STOM_DATA	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_CUSTOM_DAT A	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_DUTY	
			OA4F_CX_CAM PAIGN_MEMBER S_CONTENT_D UTY	
			OA4F_CX_SALE S_LEAD_ACTIVI TY_CONTENT_D UTY	
			OA4F_CX_LEAD S_CONTENT_D UTY	
			OA4F_CX_OPTY _ANALYSIS_CO NTENT_DUTY	
			OA4F_CX_REVN _LINE_ANALYSI S_CONTENT_D UTY	
			OA4F_CX_REVN _LINE_SNP_AN	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			ALYSIS_CONTE NT_DUTY	
			OA4F_CX_OPTY _SNP_ANALYSIS _CONTENT_DU TY	
			OA4F_CX_OPTY _PROG_ANALYS IS_CONTENT_D UTY	
			OA4F_CX_SALE S_ACTIVITY_CO NTENT_DUTY	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_CO NTENT_DUTY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_C ONTENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_CON TENT_DUTY	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_CONTENT_ DUTY	
			OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_CONTE NT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_CONTE NT_DUTY	
			OA4F_CX_SALE S_PIPELINE_OA C_CONTENT_D UTY	
			OA4F_CX_WIN_ LOSS_OAC_CO NTENT_DUTY	
			OA4F_CX_SALE S_ACTIVITY_OA C_CONTENT_D UTY	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_LEAD S_OAC_CONTE NT_DUTY	
			OA4F_CX_CAM PAIGN_EFFECTI VENESS_OAC_ CONTENT_DUT Y	
			OA4F_CX_OPP ORTUNITY_QUO TES_OAC_CON TENT_DUTY	
			OA4F_CX_SR_M ANAGEMENT_O AC_CONTENT_ DUTY	
			OA4F_CX_RENE WAL_SALES_OA C_CONTENT_D UTY	
			OA4F_CX_LEAD _CONVERSION_ OAC_CONTENT_ _DUTY	
			OA4F_CX_CAM PAIGN_ACTIVIT Y_ANALYSIS_OA C_CONTENT_D UTY	
			OA4F_CX_CAM PAIGN_MEMBER S_OAC_CONTE NT_DUTY	
			OA4F_CX_SALE S_ACTIVITY_OA C_CONTENT_D UTY	
			OA4F_CX_SALE S_LEAD_ACTIVI TY_OAC_CONT ENT_DUTY	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_OA C_CONTENT_D UTY	
			OA4F_CX_LEAD S_OAC_CONTE NT_DUTY	
			OA4F_CX_OPTY _ANALYSIS_OA	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			C_CONTENT_D UTY	
			OA4F_CX_REVN _LINE_ANALYSI S_OAC_CONTE NT_DUTY	
			OA4F_CX_OPTY _SNP_ANALYSIS _OAC_CONTEN T_DUTY	
			OA4F_CX_REVN _LINE_SNP_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_OPTY _PROG_ANALYS IS_OAC_CONTE NT_DUTY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_OA C_CONTENT_D UTY	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_OAC_CONT ENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_OAC _CONTENT_DU TY	
			OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R EVENUE_ANALY SIS_DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R EVENUE_ANALY SIS_CONTENT_ DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R	

<b>Job-Specific Group Code</b>	<b>Job-Specific Group Name</b>	<b>Description</b>	<b>Associated Application Roles</b>	<b>Functional Area</b>
			EVENUE_ANALY SIS_OAC_CONT ENT_DUTY	



Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_ZBS_SALE S_REPRESENTA TIVE_JOB	Sales Representative	Sales Representative Job Group	OA4F_CX_CAM PAIGN_MEMBER S_DUTY OA4F_CX_CAM PAIGN_OPTY_R EVN_DUTY OA4F_CONTEN T_REPORTING_ CONFIG OA4F_CX_SALE S_LEAD_ACTIVI TY_DUTY OA4F_CX_LEAD S_DUTY OA4F_CX_SALE S_LEAD_CUSTO M_DATA OA4F_CX_SALE S_LEADS_DATA OA4F_CX_OPTY _ANALYSIS_DUT Y OA4F_CX_SALE S_OPTY_CUSTO M_DATA OA4F_CX_SALE S_OPTY_DATA OA4F_CX_REVN _LINE_ANALYSI S_DUTY OA4F_CX_REVN _LINE_SNP_AN ALYSIS_DUTY OA4F_CX_OPTY _SNP_ANALYSIS _DUTY OA4F_CX_OPTY _PROG_ANALYS IS_DUTY OA4F_CX_SALE S_ACCNT_DATA OA4F_CX_SALE S_ACTIVITY_DU TY OA4F_CX_SALE S_ACTIVITY_AS SIGNEE_DATA OA4F_CX_SALE S_ACTIVITY_DE LEGATOR_DATA	CX Sales

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_SALE S_ACTIVITY_RE S_HIER_DATA	
			OA4F_CX_SALE S_ACTIVITY_CU STOM_DATA	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_DU TY	
			OA4F_CX_SALE S_OPTY_QUOT E_CUSTOM_DAT A	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y	
			OA4F_CX_SERV ICE_REQUEST_ CUSTOM_DATA	
			OA4F_CX_SERV ICE_REQUEST_ ALL_DATA	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_DUTY	
			OA4F_CX_CAM PAIGN_MEMBER S_CONTENT_D UTY	
			OA4F_CX_SALE S_LEAD_ACTIVI TY_CONTENT_D UTY	
			OA4F_CX_LEAD S_CONTENT_D UTY	
			OA4F_CX_OPTY _ANALYSIS_CO NTENT_DUTY	
			OA4F_CX_REVN _LINE_ANALYSI S_CONTENT_D UTY	
			OA4F_CX_REVN _LINE_SNP_AN	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			ALYSIS_CONTE NT_DUTY	
			OA4F_CX_OPTY _SNP_ANALYSIS _CONTENT_DU TY	
			OA4F_CX_OPTY _PROG_ANALYS IS_CONTENT_D UTY	
			OA4F_CX_SALE S_ACTIVITY_CO NTENT_DUTY	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_CO NTENT_DUTY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_C ONTENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_CON TENT_DUTY	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_CONTENT_ DUTY	
			OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_CONTE NT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_CONTE NT_DUTY	
			OA4F_CX_SALE S_PIPELINE_OA C_CONTENT_D UTY	
			OA4F_CX_WIN_ LOSS_OAC_CO NTENT_DUTY	
			OA4F_CX_SALE S_ACTIVITY_OA C_CONTENT_D UTY	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			OA4F_CX_LEAD S_OAC_CONTE NT_DUTY	
			OA4F_CX_CAM PAIGN_EFFECTI VENESS_OAC_ CONTENT_DUT Y	
			OA4F_CX_OPP ORTUNITY_QUO TES_OAC_CON TENT_DUTY	
			OA4F_CX_SR_M ANAGEMENT_O AC_CONTENT_ DUTY	
			OA4F_CX_RENE WAL_SALES_OA C_CONTENT_D UTY	
			OA4F_CX_LEAD _CONVERSION_ OAC_CONTENT_ _DUTY	
			OA4F_CX_CAM PAIGN_ACTIVIT Y_ANALYSIS_OA C_CONTENT_D UTY	
			OA4F_CX_CAM PAIGN_MEMBER S_OAC_CONTE NT_DUTY	
			OA4F_CX_SALE S_ACTIVITY_OA C_CONTENT_D UTY	
			OA4F_CX_SALE S_LEAD_ACTIVI TY_OAC_CONT ENT_DUTY	
			OA4F_CX_SALE S_OPPORTUNIT Y_ACTIVITY_OA C_CONTENT_D UTY	
			OA4F_CX_LEAD S_OAC_CONTE NT_DUTY	
			OA4F_CX_OPTY _ANALYSIS_OA	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			C_CONTENT_D UTY	
			OA4F_CX_REVN _LINE_ANALYSI S_OAC_CONTE NT_DUTY	
			OA4F_CX_OPTY _SNP_ANALYSIS _OAC_CONTEN T_DUTY	
			OA4F_CX_REVN _LINE_SNP_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_OPTY _PROG_ANALYS IS_OAC_CONTE NT_DUTY	
			OA4F_CX_SALE S_OPTY_QUOT E_ANALYSIS_OA C_CONTENT_D UTY	
			OA4F_CX_SALE S_OPPTY_QUO TE_LINE_ANALY SIS_OAC_CONT ENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_OAC _CONTENT_DU TY	
			OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_OAC_C ONTENT_DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R EVENUE_ANALY SIS_DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R EVENUE_ANALY SIS_CONTENT_ DUTY	
			OA4F_CX_CAM PAIGN_OPTY_R	

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
			EVENUE_ANALY SIS_OAC_CONT ENT_DUTY	
ORA_SVC_CUS TOMER_SERVIC E_REPRESENTA TIVE_JOB	Customer Service Representative	Customer Service Representative Job Group	OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y  OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_DUTY  OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_DUTY  OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_CON TENT_DUTY  OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_CONTE NT_DUTY  OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_CONTE NT_DUTY  OA4F_CX_SR_M ANAGEMENT_O AC_CONTENT_ DUTY  OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_OAC _CONTENT_DU TY  OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_OAC_C ONTENT_DUTY  OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_OAC_C ONTENT_DUTY	CX Service

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_SVC_CUS TOMER_SERVIC E_MANAGER_J OB	Customer Service Manager	Customer Service Manager Job Group	OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_DUT Y  OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_DUTY  OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_DUTY  OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_CON TENT_DUTY  OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_CONTE NT_DUTY  OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_CONTE NT_DUTY  OA4F_CX_SR_M ANAGEMENT_O AC_CONTENT_ DUTY  OA4F_CX_SERV ICE_REQUEST_ ANALYSIS_OAC _CONTENT_DU TY  OA4F_CX_SERV ICE_REQUEST_ LIFECYCLE_AN ALYSIS_OAC_C ONTENT_DUTY  OA4F_CX_SERV ICE_REQUEST_ MILESTONE_AN ALYSIS_OAC_C ONTENT_DUTY	CX Service

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Functional Area
ORA_OSS_SUBSCRIPTION_SPECIALIST_JOB	Subscription Specialist	Subscription Specialist Job Groups	OA4F_CX_SUBSCRIPTIONS_ANALYSIS_DUTY OA4F_CX_SUBSCRIPTION_CUSTOMER_DATA OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_DUTY OA4F_CX_SUBSCRIPTION_HISTORICAL_TREND_ANALYSIS_DUTY OA4F_CX_SUBSCRIPTIONS_ANALYSIS_CONTENT_DUTY OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_CONTENT_DUTY OA4F_CX_SUBSCRIPTION_HISTORICAL_TREND_ANALYSIS_CONTENT_DUTY OA4F_CX_SUBSCRIPTIONS_ANALYSIS_OAC_CONTENT_DUTY OA4F_CX_SUBSCRIPTION_HISTORICAL_TREND_ANALYSIS_OAC_CONTENT_DUTY OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_OAC_CONTENT_DUTY OA4F_CX_SUBSCRIPTION_CUSTOMER_DATA OA4F_CX_SUBSCRIPTION_BUSINESS_UNIT_DATA	CX Subscription



## Common Job-Specific Groups

The common job-specific groups are applicable across the analytics applications that are part of Oracle Fusion Analytics Warehouse such as Oracle Fusion HCM Analytics and Oracle Fusion ERP Analytics.

Job-Specific Group Code	Job-Specific Group Name	Description	Associated Application Roles	Associated Application Role Names	Functional Area
ORA_FND_INTEGRATION_SPECIALIST_JOB	Integration Specialist	Individual responsible for planning, coordinating, and supervising all activities related to the integration of enterprise information systems. Has author privileges.	Author OA4F_COMM ON_DATA_AD MIN_ANALYSIS_DUTY	Not applicable	Common

## Data Roles

### Overview

This section provides data roles that can be used to secure access to the subject area.

Data Role Code	Data Role Name	Description	Functional Area
OA4F_CX_SALES_ACTIVITY_ASSIGNEE_DATA	Sales Activity By Assignee Data Security	Data security role to access activity data by Assignee.	CX Sales
OA4F_CX_SALES_ACTIVITY_DELEGATOR_DATA	Sales Activity By Delegator Data Security	Data security role to access Sales activity data by Delegator.	CX Sales
OA4F_CX_SALES_ACTIVITY_RES_HIER_DATA	Sales Activity By Resource Hierarchy Data Security	Data security role to access activity data by Resource Hierarchy.	CX Sales
OA4F_CX_SALES_ACTIVITY_CUSTOM_DATA	Sales Activity Custom and System Access Group Data Security	Data security role to access Activity data by Activity Access Group data.	CX Sales
OA4F_CX_SALES_LEAD_CUSTOM_DATA	Lead Custom and System Access Group Data Security	Data security role to access Lead data by Access Group data	CX Sales
OA4F_CX_SALES_LEAD_DATA	Lead Data Security	Data security role to access Lead data.	CX Sales

Data Role Code	Data Role Name	Description	Functional Area
OA4F_CX_SALES_OPTY_CUSTOM_DATA	Opportunity Custom and System Access Group Data Security	Data security role to access Opportunity data by Access Group data.	CX Sales
OA4F_CX_SALES_OPTY_DATA	Opportunity Data Security	Data security role to opportunity data.	CX Sales
OA4F_CX_SALES_ACCNT_DATA	Sales Account Data Security	Data security role to access sales account data.	CX Sales
OA4F_CX_SERVICE_REQUEST_CUSTOM_DATA	Service Request Custom and System Access Group Data Security	Data security role to access B2B Service Request data by Activity Access Group data.	CX Service
OA4F_CX_SERVICE_REQUEST_ALL_DATA	Service Request All Data Security	Data security role to allow access to all Service Request data.	CX Service
OA4F_CX_SALES_OPTY_QUOTE_CUSTOM_DATA	Opportunity Quote Custom and System Access Group Data Security	Data security role to access Opportunity Quote data by Access group data.	CX Sales
OA4F_CX_SUBSCRIPTION_BUSINESS_UNIT_DATA	Subscription Business Unit Data Security	Data Security role to access Subscription Business Unit based data	CX Subscription
OA4F_CX_SUBSCRIPTION_CUSTOM_DATA	Subscription Custom and System Access Group Data Security	Data Security role to access Subscription data by Access group data	CX Subscription

## Duty Roles

### Overview

This section provides subject area and content-related duty roles that you can use to secure access to the subject areas and specific content. For each duty role in this section, links are provided for detailed information about the job-specific groups, subject areas, and business questions associated with the duty role.

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_SALES_OPPORTUNITY_ACTIVITY_DUTY	Sales Opportunity Activity Analysis Duty	Controls presentation catalog access to CX - Opportunity Activity subject area.	CX - Sales	CX - Opportunity Activity

<b>Duty Role Code</b>	<b>Duty Role Name</b>	<b>Duty Role Description</b>	<b>Functional Area</b>	<b>Gets access to Subject Area Display Name OR Associated Role</b>
OA4F_CX_SALES_LEAD_ACTIVITY_DUTY	Lead Activity Analysis Duty	Controls presentation catalog access to CX - Lead Activity subject area.	CX - Sales	CX - Lead Activity
OA4F_CX_SALES_ACTIVITY_DUTY	Sales Activity Analysis Duty	Controls presentation catalog access to CX - Activity subject area.	CX - Sales	CX - Activity
OA4F_CX_REVN_LINE_SNP_ANALYSIS_DUTY	Opportunity Revenue Line Snapshot Duty	Controls presentation catalog access to CX - Opportunity Revenue Line Snapshot subject area.	CX - Sales	CX - Opportunity Revenue Line Snapshot
OA4F_CX_REVN_LINE_ANALYSIS_DUTY	Opportunity Revenue Analysis Duty	Controls presentation catalog access to CX - Opportunity Revenue Line subject area.	CX - Sales	CX - Opportunity Revenue Line
OA4F_CX_OPTY_SNP_ANALYSIS_DUTY	Opportunity Snapshot Duty	Controls presentation catalog access to CX - Opportunity Revenue Line subject area.	CX - Sales	CX - Opportunity Snapshot
OA4F_CX_OPTY_PROG_ANALYSIS_DUTY	Opportunity Stage Progression Duty	Controls presentation catalog access to CX - Opportunity Stage Progression subject area.	CX - Sales	CX - Opportunity Stage Progression
OA4F_CX_OPTY_ANALYSIS_DUTY	Opportunity Analysis Duty	Controls presentation catalog access to CX - Opportunity subject area.	CX - Sales	CX - Opportunity
OA4F_CX_LEADS_DUTY	Lead Analysis Duty	Controls presentation catalog access to CX - Leads subject area.	CX - Sales	CX - Leads
OA4F_CX_CAMPAIGN_MEMBERS_DUTY	Campaign Members Analysis Duty	Controls presentation catalog access to CX - Campaign Members subject area.	CX - Sales	CX - Campaign Members

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_SALES_OPTY_QUOTE_ANALYSIS_DUTY	Opportunity Quote Analysis Duty	Controls presentation catalog access to CX - Opportunity Quote subject area.	CX-Sales	CX - Opportunity Quote
OA4F_CX_SERVICE_REQUEST_ANALYSIS_DUTY	Service requests Analysis Duty	Controls presentation catalog access to CX - B2B Service Requests subject area.	CX - Service	CX - Service Request
OA4F_CX_SALES_OPTY_QUOTE_LINE_ANALYSIS_DUTY	Opportunity Quote Line Analysis Duty	Controls presentation catalog access to CX - Opportunity Quote Line subject area.	CX-Sales	CX - Opportunity Quote Line
OA4F_CX_SUBSCRIPTIONS_ANALYSIS_DUTY	Subscription Analysis Duty	Controls presentation catalog access to CX - Subscriptions subject area.	CX - Subscription	CX - Subscription
OA4F_CX_SUBSCRIPTION_HISTORICAL_TREND_ANALYSIS_DUTY	Subscription Historical Trend Analysis Duty	Controls presentation catalog access to CX - Subscription Historical Trend subject area.	CX - Subscription	CX - Subscription Historical Trend
OA4F_CX_CAMPAIGN_ACTIVITY_ANALYSIS_DUTY	Campaign Activity Analysis Duty	Controls presentation catalog access to CX - Campaign Activity Analysis subject area.	CX - Marketing	CX - Campaign Activity Analysis
OA4F_CX_CAMPAIGN_ACTIVITY_DETAIL_ANALYSIS_DUTY	Campaign Activity Detail Analysis Duty	Object security role to control presentation catalog access to "CX - Campaign Activity Detail Analysis" subject area.	CX - Marketing	CX - Campaign Activity Detail Analysis
OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_DUTY	Subscription Bill Line Analysis Duty	Controls presentation catalog access to CX - Subscription Bill Line subject area.	CX - Subscription	CX - Subscription Bill Line

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_CAMPA IGN_MEMBERS_ CONTENT_DUTY	Campaign Member Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Campaign Members subject area.	CX-Sales	NA
OA4F_CX_CAMPA IGN_OPTY_REVN_ CONTENT_DUT Y	Campaign Opportunity Revenue Line Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Campaign Opportunity Revenue Line subject area.	CX-Sales	NA
OA4F_CX_SALES _LEAD_ACTIVITY _CONTENT_DUT Y	Lead Activity Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Lead Activity subject area.	CX-Sales	NA
OA4F_CX_LEADS _CONTENT_DUT Y	Lead Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Leads subject area.	CX-Sales	NA
OA4F_CX_OPTY_ ANALYSIS_CONT ENT_DUTY	Opportunity Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity subject area.	CX-Sales	NA
OA4F_CX_REVN_ LINE_ANALYSIS_ CONTENT_DUTY	Opportunity Revenue Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Revenue Line subject area.	CX-Sales	NA

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_CAMPANALYSIS_CONTENT_DUTY	Campaign Activity Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Campaign Activity Analysis subject area.	CX - Marketing	NA
OA4F_CX_REVENUE_SNAPSHOT_CONTENT_DUTY	Opportunity Revenue Line Snapshot Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Revenue Line Snapshot subject area.	CX-Sales	NA
OA4F_CX_SALES_ACTIVITY_CONTENT_DUTY	Sales Activity Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Activity subject area.	CX-Sales	NA
OA4F_CX_SALES_OPPORTUNITY_ACTIVITY_CONTENT_DUTY	Sales Opportunity Activity Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Activity subject area.	CX-Sales	NA
OA4F_CX_SALES_OPPORTUNITY_QUOTE_ANALYSIS_CONTENT_DUTY	Opportunity Quote Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Quote subject area.	CX-Sales	NA

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_SALES_OPPTY_QUOTE_LINE_ANALYSIS_CONTENT_DUTY	Opportunity Quote Line Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Quote Line subject area.	CX-Sales	NA
OA4F_CX_SERVICE_REQUEST_ANALYSIS_CONTENT_DUTY	Service Request Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Service Request subject area.	CX-Sales	NA
OA4F_CX_SERVICE_REQUEST_LIFECYCLE_ANALYSIS_CONTENT_DUTY	Service Request Lifecycle Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Service Request Lifecycle subject area.	CX - Service	NA
OA4F_CX_SERVICE_REQUEST_MILESTONE_ANALYSIS_CONTENT_DUTY	Service Request Milestone Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Service Request Milestone subject area.	CX - Service	NA
OA4F_CX_SUBSCRIPTION_BILL_LINE_ANALYSIS_CONTENT_DUTY	Subscription Bill Line Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Subscription Bill Line subject area.	CX - Subscription	NA
OA4F_CX_SUBSCRIPTIONS_ANALYSIS_CONTENT_DUTY	Subscription Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Subscriptions subject area.	CX - Subscription	NA

Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_SUBCR PTION_HISTORIC AL_TREND_ANAL YSIS_CONTENT_ DUTY	Subscription Historical Trend Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Subscription Historical Trend subject area.	CX - Subscription	NA
OA4F_CX_OPTY_ SNP_ANALYSIS_C ONTENT_DUTY	Opportunity Snapshot Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Snapshot subject area.	CX-Sales	NA
OA4F_CX_OPTY_ PROG_ANALYSIS _CONTENT_DUT Y	Opportunity Stage Progression Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Opportunity Stage Progression subject area.	CX-Sales	NA
OA4F_CX_CAMPA IGN_OPTY_REVE NUE_ANALYSIS_ DUTY	Campaign Opportunity Revenue Analysis Duty	Controls presentation catalog access to CX - Campaign Opportunity Revenue subject area.	CX-Sales	CX - Campaign Opportunity Revenue
OA4F_CX_CAMPA IGN_OPTY_REVE NUE_ANALYSIS_ CONTENT_DUTY	Campaign Opportunity Revenue Analysis Content Duty	Controls presentation catalog access to DV projects and business metrics built against the CX - Campaign Opportunity Revenue subject area.	CX-Sales	NA



Duty Role Code	Duty Role Name	Duty Role Description	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_CX_CAMPAIGN_OPTY_REVENUE_ANALYSIS_OAC_CONTENT_DUTY	Campaign Opportunity Revenue Analysis OAC Content Duty	Controls presentation catalog access to business metric Overview Dashboards built against the CX - Campaign Opportunity Revenue Analysis subject area	CX-Sales	NA

## Common Duty Roles

You can select the subject area for each of the Oracle Fusion Analytics Warehouse products and review the data lineage details. This enables you to understand the column and table lineage from the presentation layer to the physical layer.

Duty Role Code	Duty Role Name	Details	Functional Area	Gets access to Subject Area Display Name OR Associated Role
OA4F_COMMON_DATA_ADMIN_ANALYSIS_DUTY	Data Warehouse Refresh Analysis Duty	Object security role to control presentation catalog access to Common - Warehouse Refresh Statistics subject area.	Common	Common - Warehouse Refresh Statistics
OA4F_COMMON_USAGE_TRACKING_DUTY	Usage Tracking Analysis Duty	Object security role to control presentation catalog access to Common - Usage Tracking subject area.	Common	Common - Usage Tracking
OA4F_SECURITY_REPORTING_DUTY	Security Reporting Duty	Object security role to control presentation catalog access to Security Assignment and Security Audit History subject areas.	Common	Common - Security Assignment Common - Security Audit History

## Subject Area Metric Details

## CX - Activity

This table describes the Activity Metrics.

Metric	Metric Definition
# of Activities	The total Activities
# of Appointments	The total Appointments (Activity function = Appointments)
# of Call Reports	The total Call Reports (Activity function = Call Reports)
# of Completed Activities	The total Completed Activities (Status = Complete)
# of Expired Activities	The total Expired Activities (Status not equal to Complete/Cancelled & Current Date > Activity Due Date)
# of Open Activities	The total Open Activities (Status not equal to Complete/Cancelled)
# of Tasks	The total Tasks (Activity function = Task)
Average Activity Duration For Completed Activities	Average time to Complete the Activity
Average Number of Activities Per Team Member	Average number of Activity per Team Member. This metric is computed as follows: # of Activities/# of Resources

## CX - Campaign Activity Analysis

This table describes the Marketing (Eloqua) Campaign Activity Analysis metrics.

Metric	Metric Definition
# of Bouncebacks	The total Emails that returned a Bounceback (hard or soft)
# of Email Clickthroughs	The total Email Clickthroughs. This includes multiple clicks by the same recipient
# of Email Opens	The total Email Opens
# of Emails Delivered	the total Emails Delivered
# of Emails Sent	The total Emails Sent
# of Existing Visitor Clickthroughs	The total Email clickthrough by returning visitor
# of Form Submissions	The total Form submissions. This includes multiple submissions by the same contact
# of Hard Bouncebacks	The total Emails that returned a Hard Bounceback. A hard bounce back is an Email that permanently couldn't be delivered.
# of Landing Page Views	The number of times the landing page was viewed. If a visitor visits the page multiple times, all those views are counted.
# of New Contacts	The total new Contacts (New contact is the contact that is created as a result of Campaign response)
# of New Leads	The total new leads generated by the Campaign. (A lead is generated if a contact is newly acquired and responds to the campaign. Contacts are considered leads only once, so contacts are considered new leads only the first time they respond to a campaign. For subsequent responses, the contact is considered an existing lead. )
# of New Visitor Clickthroughs	The total Email clickthrough by New visitor

Metric	Metric Definition
# of Page Views	The total number of times the page was viewed. If a visitor visits the page multiple times, all those views are counted.
# of Possible Forwarders	The total original recipients that forwarded the email atleast once
# of Responses	The total response activity for the campaign
# of Soft Bouncebacks	The total Emails that returned a Soft Bounceback. A soft bounce back is an Email that temporarily couldn't be delivered.
# of Spam Unsubscribers by Email	The total Email recipients that marked the email as Spam
# of Unsubscribes by Email	The total Email recipients that Unsubscribed. (Globally or Spam Unsubscribed)
# of Visitors	The unique visitors to a webpage
Average Landing Page Time	The average amount of time spent on a Landing page. This metric is computed as follows: (Landing Page Time / Landing Page Views)
Average Responses	The average number of campaign responses (Total Response / Campaign Count)
Bounceback Rates	The Email Bounceback rate. This metric is computed as follows: (Total Soft and Hard bouncebacks / Total Emails sent) * 100
Clickthrough Rate (CTR)	The Clickthrough Rate. This metric is computed as follows: (Total Clickthroughs / Total Emails Delivered) * 100
Delivered Rate	The email Delivered Rate. This metric is computed as follows: (Total Emails delivered / Total Emails sent) * 100
Hard Bounceback Rate	The Hard Bounceback rate. This metric is computed as follows: (Total Hard bouncebacks / Total Emails sent) * 100
Landing Page Time	The total amount of time visitors spent on a Landing Page in seconds
Open Rate	The Email Open Rate. This metric is computed as follows: (Total Emails Opened / Total Emails Delivered) * 100
Possible Forward Rate	The Possible Forward Rate. This metric is computed as follows: (Total Possible Forwarders / Total Emails Delivered) * 100
Soft Bounceback Rate	The Soft Bounceback rate. This metric is computed as follows: (Total Soft bouncebacks/Total Emails sent) * 100
Unsubscribed Rate	The Unsubscribe Rate. This metric is computed as follows: (Total Unsubscribes / Total Emails Delivered) * 100
# of Outbound Activities	The total outbound activities associated with a Campaign
# of Inbound Activities	The total inbound activities
# of Marketing Activities	Total number of activities (total outbound+inbound)
# of Campaign Members	Total contacts that entered in the Campaign
# of Campaigns	The total Campaigns included in the Analysis
# of External Activities	The activity that occurred outside Oracle Eloqua

Metric	Metric Definition
Inbound Activity Rate	The total inbound activities divided by the total Campaign member (Total Inbound Activities/Campaign Members)*100
Response Rate	The total campaign responses divided by the total campaign member (Total Responses/Campaign Members)*100

## CX - Campaign Activity Detail Analysis

This table describes the Marketing (Eloqua) Campaign Activity Detail Analysis metrics for the associated Contacts, Accounts, and Assets.

Metric	Metric Definition
# of Email Sent	The total Emails Sent
# of Emails Delivered	The total Emails Delivered. This metric is computed as follows: (# of Email Sent - # of Email Bounceback)
# of Email Opens	The total Emails Opens
# of Unique Opens	The Unique Email Opens. One open is counted against each recipient that opens the email.
# of Email Clickthroughs	The total Email Clickthroughs. This includes multiple clicks by the same recipient.
# of Unique Email Clickthroughs	The total Unique Email Clickthroughs. This includes one click per recipient.
# of Email Bounceback	The total Emails that returned a Bounceback (hard or soft)
# of Hard Email Bounceback	The total Emails that returned a Hard Bounceback. A hard bounce back is an Email that permanently couldn't be delivered.
# of Soft Email Bounceback	The total Emails that returned a Soft Bounceback. A soft bounce back is an Email that temporarily couldn't be delivered.
# of Email Unsubscribes	The total Email recipients that Unsubscribed. (Globally or Spam Unsubscribed)
# of Form Submissions	The total Form submissions. This includes multiple submissions by the same contact.
# of External Activities	The activity that occurred outside Oracle Eloqua
Bounceback Rates	The Email Bounceback rate. This metric is computed as follows: (Total Soft and Hard bouncebacks/Total Emails sent)*100
Hard Bounceback Rate	The Hard Bounceback rate. This metric is computed as follows: (Total Hard bouncebacks/Total Emails sent)*100
Soft Bounceback Rate	The Soft Bounceback rate. This metric is computed as follows: (Total Soft bouncebacks/Total Emails sent)*100
Delivered Rate	The email Delivered Rate. This metric is computed as follows: (Total Emails delivered/Total Emails sent)*100
Open Rate	The Email Open Rate. This metric is computed as follows: (Total Emails Opened/Total Emails Delivered)*100

Metric	Metric Definition
Unique Open Rate	The Unique Email Open Rate. This metric is computed as follows: (Total Unique Email Opened/Total Emails Delivered)*100
# of Spam Unsubscribes by Email	The total Email recipients that marked the email as Spam.
# of Email Auto Open	The total Email opens are detected as being auto-generated by scanning or privacy tools. These opens aren't included in Total Opens or any associated open rates.
# of Email Auto Click	The total Email clickthrough detected as being auto-generated by scanning or privacy tools. These clickthroughs aren't included in Total clickthroughs or any associated click rates.
Unsubscribed Rate	The Email Unsubscribed Rate. This metric is computed as follows: (Total Unsubscribes / Total Delivered) * 100.
Clickthrough Rate	The Email clickthrough Rate. This metric is computed as follows: (Total Clickthroughs / Total Delivered) * 100.
Unique Clickthrough Rate	The Email unique clickthrough Rate. This metric is computed as follows: (Unique Clickthroughs / Total Delivered) * 100 Note: This metric calculation ignores possible forwards.

## CX - Campaign Members

These metrics will be used in the Analytics Currency (AC) and Document Currency (DC) fact folder in Subject Area.

Document Currency is the currency used while entering the data in Fusion Analytics Warehouse. Analytics Currency is the currency defined in Fusion Analytics Warehouse. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Campaign Creation Date to convert to analytics currency. Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Active CX Campaigns	The total Active CX Campaigns
# of Contacts	The total Contacts associated to CX Campaigns
# of CX Campaign Members	The total CX Campaign Members
# of CX Campaign Owners	The total CX Campaign Owners
# of CX Campaigns	The total CX Campaigns
# of Leads	The total Leads associated to CX Campaigns
# of Responses	The total CX Campaign Responses
Actual Cost	The Actual Cost of the CX Campaign
Budgeted Cost	The Budgeted Cost of the CX Campaign

## CX - Campaign Opportunity Revenue

These metrics are used in the Document Currency (DC), CX Currency (CC), and Analytics Currency (AC) fact folders in the subject area.

Document Currency is the currency used while entering the data in Fusion Analytics Warehouse. CX Currency is the currency defined in Oracle CRM. Analytics Currency is the currency defined in Fusion CX Analytics. Analytics Currency and Exchange Rate Type are configured during product implementation. Exchange Rate date basis uses the Opportunity Expected Close Date to convert to analytics currency. Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of CX Campaigns	The total CX Campaigns
# of CX Campaign Owners	The total CX Campaign Owners
# CX Campaign Targeted Accounts	The total Accounts associated to CX Campaigns (targeted by CX Campaigns)
CX Campaign Budgeted Cost	The Budgeted Cost of the CX Campaign
CX Campaign Actual Cost	The Actual Cost of the CX Campaign
# of Opportunity Revenue Lines	The total Opportunity Revenue Lines associated to CX Campaigns
# of Open Opportunity Revenue Lines	The total Open Opportunity Revenue Lines associated to CX Campaigns
# of Won Opportunity Revenue Lines	The total Won Opportunity Revenue Lines associated to CX Campaigns
# of Lost Opportunity Revenue Lines	The total lost Opportunity Revenue Lines associated to CX Campaigns
# of No Sale Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines associated to CX Campaigns
# of Opportunities with Revenue Lines	The total Opportunities with Revenue Lines
Revenue Line Loss Rate	The CX Campaign Opportunity Revenue Line Won Rate. This metric is computed as follows: $100 * \# \text{ of Won Revenue Lines} / \# \text{ of Won+Lost Revenue Lines}$
Revenue Line Won Rate	The CX Campaign Opportunity Revenue Line Loss Rate. This metric is computed as follows: $100 * \# \text{ of Lost Revenue Lines} / \# \text{ of Won+Lost Revenue Lines}$
CX Campaign Actual Vs Budgeted Cost (%)	The ratio of CX Campaign Actual and Budgeted cost. This metric is computed as follows: $\text{CX Campaign Actual Cost} / \text{CX Campaign Budgeted Cost}$
Average Won Opportunity Line Revenue	The average Won Opportunity Line Revenue. This metric is computed as follows: $\text{Won Opportunity Line Revenue} / \# \text{ of Won Opportunity Revenue Lines}$
CX Campaign Cost Per Opportunity Revenue Line	The total CX Campaign Cost Per Opportunity Revenue Line. This metric is calculated as follows: $\text{Total CX Campaign Cost} / \# \text{ of Opportunity Revenue Lines}$ .
CX Campaign Cost Per Won Opportunity Revenue Line	The total CX Campaign Cost Per Won Opportunity Revenue Line. This metric is calculated as follows: $\text{Total CX Campaign Cost} / \# \text{ of Won Opportunity Revenue Lines}$ .
Raw Opportunity Line Revenue	The total Opportunity Line Revenue (for Opportunities associated to CX Campaigns). Note that for Opportunities having multiple CX Campaigns, this value would be repeated.
Open Opportunity Line Revenue (Linear Attribution)	The total Open Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Linear attribution model.
Won Opportunity Line Revenue (Linear Attribution)	The total Won Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Linear attribution model.

Metric	Metric Definition
Lost Opportunity Line Revenue (Linear Attribution)	The total Lost Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Linear attribution model.
No Sales Opportunity Line Revenue (Linear Attribution)	The total No Sale Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Linear attribution model.
Average Won Opportunity Line Revenue (Linear Attribution)	The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue (Linear Attribution)/# of Won Opportunity Revenue Lines
CX Campaign Attributed Pipeline Revenue (Linear Attribution)	The total Pipeline revenue attributable to the CX Campaign based on the Linear attribution model (Revenue divided equally amongst all the CX Campaigns associated to the Opportunity)
CX Campaign ROI (Linear Attribution)	The ROI of the CX Campaign based on the Linear attribution model. This metric is calculated as follows: (CX Campaign Attributed Pipeline Revenue (Linear Attribution)- Actual Cost ) / Actual Cost
CX Campaign Cost Per Attributed Revenue (Linear Attribution)	The total CX Campaign Cost Per Opportunity Attributed Revenue based on the Linear attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue (Linear Attribution)
CX Campaign Cost Per Won Line Revenue (Linear Attribution)	The total CX Campaign Cost Per Opportunity Attributed Revenue based on the Linear attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue for Won Revenue Line (Linear Attribution)
Open Opportunity Line Revenue (First Touch Attribution)	The total Open Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the First Touch attribution model.
Won Opportunity Line Revenue (First Touch Attribution)	The total Won Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the First Touch attribution model.
Lost Opportunity Line Revenue (First Touch Attribution)	The total Lost Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the First Touch attribution model.
No Sales Opportunity Line Revenue (First Touch Attribution)	The total No Sale Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the First Touch attribution model.
Average Won Opportunity Line Revenue (First Touch Attribution)	The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue (First Touch Attribution)/# of Won Opportunity Revenue Lines
CX Campaign Attributed Pipeline Revenue (First Touch Attribution)	The total Pipeline revenue attributable to the CX Campaign based on the First touch attribution model (Revenue divided equally amongst all the CX Campaigns associated to the Opportunity)
CX Campaign ROI (First Touch Attribution)	The ROI of the CX Campaign based on the First touch attribution model. This metric is calculated as follows: (CX Campaign Attributed Pipeline Revenue (First touch Attribution)- Actual Cost ) / Actual Cost

Metric	Metric Definition
CX Campaign Cost Per Attributed Revenue (First Touch Attribution)	The total CX Campaign Cost Per Opportunity Attributed Revenue based on the First touch attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue (First touch Attribution)
CX Campaign Cost Per Won Line Revenue (First Touch Attribution)	The total CX Campaign Cost Per Opportunity Attributed Revenue based on the First touch attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue for Won Revenue Line (First touch Attribution)
Open Opportunity Line Revenue (Last Touch Attribution)	The total Open Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Last Touch attribution model.
Won Opportunity Line Revenue (Last Touch Attribution)	The total Won Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Last Touch attribution model.
Lost Opportunity Line Revenue (Last Touch Attribution)	The total Lost Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Last Touch attribution model.
No Sales Opportunity Line Revenue (Last Touch Attribution)	The total No Sale Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the Last Touch attribution model.
Average Won Opportunity Line Revenue (Last Touch Attribution)	The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue (Last Touch Attribution)/# of Won Opportunity Revenue Lines
CX Campaign Attributed Pipeline Revenue (Last Touch Attribution)	The total Pipeline revenue attributable to the CX Campaign based on the Last touch attribution model (Revenue divided equally amongst all the CX Campaigns associated to the Opportunity)
CX Campaign ROI (Last Touch Attribution)	The ROI of the CX Campaign based on the Last touch attribution model. This metric is calculated as follows: (CX Campaign Attributed Pipeline Revenue (Last touch Attribution)- Actual Cost ) / Actual Cost
CX Campaign Cost Per Attributed Revenue (Last Touch Attribution)	The total CX Campaign Cost Per Opportunity Attributed Revenue based on the Last touch attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue (Last touch Attribution)
CX Campaign Cost Per Won Line Revenue (Last Touch Attribution)	The total CX Campaign Cost Per Opportunity Attributed Revenue based on the Last touch attribution model. This metric is calculated as follows: Total CX Campaign Cost/ Campaign Attributed Pipeline Revenue for Won Revenue Line (Last touch Attribution)
Open Opportunity Line Revenue (U-Shaped Attribution)	The total Open Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the U-Shaped attribution model.
Won Opportunity Line Revenue (U-Shaped Attribution)	The total Won Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the U-Shaped attribution model.
Lost Opportunity Line Revenue (U-Shaped Attribution)	The total Lost Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the U-Shaped attribution model.



Metric	Metric Definition
No Sales Opportunity Line Revenue (U-Shaped Attribution)	The total No Sale Opportunity Line Revenue (for Opportunities associated to CX Campaigns) based on the U-Shaped attribution model.
Average Won Opportunity Line Revenue (U-Shaped Attribution)	The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue (U-Shaped Attribution)/# of Won Opportunity Revenue Lines
CX Campaign Attributed Pipeline Revenue (U-Shaped Attribution)	The total Pipeline revenue attributable to the campaign based on the U-Shaped attribution model (Revenue divided equally amongst all the CX Campaigns associated to the Opportunity)
CX Campaign ROI (U-Shaped Attribution)	The ROI of the CX Campaign based on the U-Shaped attribution model. This metric is calculated as follows: (CX Campaign Attributed Pipeline Revenue (U-Shaped attribution)- Actual Cost ) / Actual Cost
CX Campaign Cost Per Attributed Revenue (U-Shaped Attribution)	The total CX Campaign Cost Per Opportunity Attributed Revenue based on the U-Shaped attribution. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue (U-Shaped attribution)
CX Campaign Cost Per Won Line Revenue (U-Shaped Attribution)	The total CX Campaign Cost Per Opportunity Attributed Revenue based on the U-Shaped attribution model. This metric is calculated as follows: Total CX Campaign Cost/CX Campaign Attributed Pipeline Revenue for Won Revenue Line (U-Shaped attribution)

## CX - Lead Activity

This table describes the Lead Activity Metrics.

Metric	Metric Definition
# of Completed Lead Activities	The total Completed Activities associated to Leads (Activity Status = Complete)
# of Expired Lead Activities	The total Expired Activities associated to Leads (Activity Status not equal to Complete/Cancelled & Current Date > Activity Due Date)
# of Lead Activities	The total Activities associated to Leads
# of Lead Activities for Highly Ranked Leads	The total Activities for highly ranked Leads (Lead Rank = Hot)
# of Lead Appointments	The total Appointments associated to Leads (Activity function = Appointments)
# of Lead Call Reports	The total Call Reports associated to Leads (Activity function = Call Reports)
# of Lead Tasks	The total Tasks associated to Leads (Activity function = Task)
# of Open Lead Activities	The total Open Activities associated to Leads (Activity Status not equal to Complete/Cancelled)
Activity Rate - Converted Leads	The rate of Activities for Converted Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Converted Leads} / \# \text{ of Converted Leads}$

Metric	Metric Definition
Activity Rate - Qualified Leads	The rate of Activities for Qualified Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Qualified Leads} / \# \text{ of Qualified Leads}$
Activity Rate - Rejected Leads	The rate of Activities for Rejected Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Rejected Leads} / \# \text{ of Rejected Leads}$
Activity Rate - Retired Leads	The rate of Activities for Retired Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Retired Leads} / \# \text{ of Retired Leads}$
Activity Rate - Unaccepted Leads	The rate of Activities for Unaccepted Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Unaccepted Leads} / \# \text{ of Unaccepted Leads}$
Activity Rate - Unassigned Leads	The rate of Activities for Unassigned Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Unassigned Leads} / \# \text{ of Unassigned Leads}$
Activity Rate - Unconverted Leads	The rate of Activities for Unconverted Leads. This metric is computed as follows: $100 * \# \text{ of Activities for Unconverted Leads} / \# \text{ of Unconverted Leads}$
Average Activity Duration For Completed Activities	The average time taken to complete an activity. This metric is computed as follows: $\text{Activity duration for completed activity} / \# \text{ of Completed Activities}$
Average Number of Lead Activities Per Team Member	The average number of Lead Activities per Team member.
Lead Activity Rate	The rate of Activities for Leads. This metric is computed as follows: $100 * \# \text{ of Lead Activities} / \# \text{ of Leads}$
Lead First Response Time	The time to respond to an assigned Lead. This metric is computed as follows: $\text{Date of first Lead Activity} - \text{Lead assigned date}$
Lead Idle Days	The days since the last Lead Activity. This metric is computed as follows: $\text{Current Date} - \text{Last Lead Activity Date}$

## CX - Leads

These metrics are used in the Document Currency (DC), CX Currency (CC), and Analytics Currency (AC) fact folders in this subject area.

Document Currency is the currency used while entering the data in the application. CX Currency is the currency defined in Oracle CRM. Analytics Currency is the currency defined in Fusion Analytics Warehouse. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Lead Creation Date to convert to the analytics currency. Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Accepted Leads	The total Accepted Leads (Accepted Flag = Y)
# of Accounts Leads Converted	The total Converted Leads from Account(Lead Status = Converted, Sales Account Type = Customer)
# of Assigned Leads	The total assigned leads (Assignment status = Assigned)
# of Contacts with Leads	The total Contacts with Leads

Metric	Metric Definition
# of highly Ranked Qualified Leads	The total Qualified Hot Leads (Lead Status = Qualified, Rank Name = Hot)
# of Leads	The total number of Leads
# of Leads Converted	The total Converted Leads (Lead Status = Converted)
# of Leads from Account	The total leads from Account (Sales Account Type = Customer)
# of Leads from Prospect Account	The total leads from Prospect (Sales Account Type = Prospect)
# of Leads Generated from Marketing Source	The total Leads generated from Marketing Source (Lead Source = Marketing)
# of Leads Generated from Non Marketing Source	The total Leads generated from Non- marketing Source (Lead Source not equal to Marketing)
# of Low Ranked Qualified Leads	The total Qualified Cool Leads (Lead Status = Qualified, Rank Name = Cool)
# of Medium Ranked Qualified Leads	The total Qualified Warm Leads (Lead Status = Qualified, Rank Name = Warm)
# of Partner Assigned Leads	The total leads assigned to a Partner
# of Prospect Leads Converted	The total Converted Leads from Prospect(Lead Status = Converted, Sales Account Type = Prospect)
# of Qualified Expired Leads	The total Qualified Expired Leads (Lead Status = Qualified, Current Date > Lead Expiry Date)
# of Qualified Leads	The total Qualified Leads (Lead Status = Qualified)
# of Rejected Leads	The total Rejected Leads (Assignment Status = Rejected)
# of Retired Leads	The total Retired Leads (Lead Status = Retired)
# of Sales Accounts with Leads	The total Accounts with Leads
# of Unaccepted Leads	The total Unaccepted Leads (Accepted Flag = N)
# of Unassigned Leads	The total Unassigned Leads. This metric is computed as follows: # of Leads - # of Assigned Leads
# of Uncovered Leads	The total Unconverted Leads. This metric is computed as follows: # of Leads - # of Converted Leads
# of Unqualified Leads	The total Unqualified leads (Lead Status = Unqualified)
Average Lead Age (Days)	The average age of the Leads. This metric is computed as follows: For Converted or Retired Leads, the day when it was converted/Retired - Lead Created date. For others it is the Current Date - the Lead created date
Average Number of Days Open for Unqualified Leads	The Average number of days to Qualify a lead. This metric is computed as follows: Total Lead Age of Unqualified leads/ # of Unqualified Leads
Average Number of Days to Convert Leads	The Average number of days to Convert a lead. This metric is computed as follows: Total Lead Age of Converted leads/ # of Converted Leads
Budget Amount	The total Budget Amount
Lead Idle Days	The total days the Active Lead is idle (Lead Status not equal to Retired/Rejected). This metric is computed as follows: Current Date - Last Activity Date
Lead Qualification Rate (%)	Rate of Qualified Leads to the total Leads. This metric is computed as follows: $100 * \# \text{ of Qualified Leads} / \# \text{ of Leads}$

Metric	Metric Definition
Lead Qualification to Conversion Velocity	Rate of Converting the Qualified Leads. This metric is computed as follows: Lead Converted Date - Lead Qualified Date / # of Converted Leads
Lead Qualification Velocity	Rate of Qualifying the Leads. This metric is computed as follows: Lead Qualified Date - Lead Created Date/# of Qualified Leads
Leads Conversion % (Across Levels in Lead Owner Resource Hierarchy)	Lead to Opportunity Conversion % calculated at the total level of lead owner hierarchy
Leads Conversion % (Across Levels in Primary Partner Hierarchy)	Lead to Opportunity Conversion % calculated at the total level of primary partner hierarchy
Leads Conversion % (Across Levels in Sales Account Hierarchy)	Lead to Opportunity Conversion % calculated at the total level of sales account hierarchy
Leads to Opportunity Conversion (%)	Rate of Converted Leads to the total Leads. This metric is computed as follows: # of Converted Leads/# of Leads
Potential Revenue	The total Lead Revenue
Ratio of Converted Leads to Qualified Leads	Ratio of Converted Leads to Qualified Leads
Ratio of Highly Ranked Qualified Leads to Qualified Leads	Ratio of Highly Ranked Qualified Leads to Qualified Leads
Ratio of Low Ranked Qualified Leads to Qualified Leads	Ratio of Low Ranked Qualified Leads to Qualified Leads
Ratio of Medium Ranked Qualified Leads to Qualified Leads	Ratio of Medium Ranked Qualified Leads to Qualified Leads
Ratio of Qualified Leads to Unqualified Leads	Ratio of Qualified Leads to Unqualified Leads
Ratio of Retired Leads to Ratio of Unqualified Leads	Ratio of Retired Leads to Unqualified Leads
Raw Lead Amount	The total Raw Lead Amount
Rejected Leads (%)	Rate of Rejected Leads to the total Leads. This metric is computed as follows: # of Rejected Leads/# of Leads
Retired Leads (%)	Rate of Retired Leads to the total Leads. This metric is computed as follows: # of Retired Leads/# of Leads
Total Market Potential	The total Lead Revenue for Qualified or Unqualified Leads

## CX - Opportunity

This table describes the Opportunity Metrics.

Metric	Metric Definition
# of Accounts with Won Opportunities	The total Accounts with Won Opportunities
# of Competitive Lost Opportunities	The total Lost Opportunities with atleast one Competitor
# of Competitive No Sale Opportunities	The total No Sale Opportunities with atleast one Competitor
# of Competitive Open Opportunities	The total Open Opportunities with atleast one Competitor
# of Competitive Opportunities	The total Opportunities with atleast one Competitor
# of Competitive Won Opportunities	The total Won Opportunities with atleast one Competitor
# of Converted Lost Opportunities	The total Lost Opportunities which were created by converting the Leads.
# of Converted Open Opportunities	The total Open Opportunities which were created by converting the Leads.

Metric	Metric Definition
# of Converted Opportunities	The total Opportunities which were created by converting the Leads.
# of Converted Won Opportunities	The total Won Opportunities which were created by converting the Leads.
# of Expansion Opportunities	The total Expansion Opportunities (Opportunity Type Code = Expansion)
# of Expired Opportunities	The total Expired Opportunities. This metric is computed as follows: Opportunity Status = Open, Current Date > Opportunity Expected Close Date
# of Lost Expansion Opportunities	The total Lost Expansion Opportunities (Opportunity Status = Lost and Opportunity Type Code = Expansion)
# of Lost New Opportunities	The total Lost New Opportunities (Opportunity Status = Lost and Opportunity Type Code = New)
# of Lost Opportunities	The total Lost Opportunities (Opportunity Status = Lost)
# of Lost Renewal Opportunities	The total Lost Renewal Opportunities (Opportunity Status = Lost and Opportunity Type Code = Renewal)
# of New Opportunities	The total New Opportunities (Opportunity Type Code = New)
# of No Sale Expansion Opportunities	The total No Sale Expansion Opportunities (Opportunity Status = No Sale and Opportunity Type Code = Expansion)
# of No Sale Opportunities	The total No Sale Opportunities (Opportunity Status = No Sale)
# of No Sale Renewal Opportunities	The total No Sale Renewal Opportunities (Opportunity Status = No Sale and Opportunity Type Code = Renewal)
# of Open Expansion Opportunities	The total Open Expansion Opportunities (Opportunity Status = Open and Opportunity Type Code = Expansion)
# of Open New Opportunities	The total Open New Opportunities (Opportunity Status = Open and Opportunity Type Code = New)
# of Open Opportunities	The total Open Opportunities (Opportunity Status = Open)
# of Open Renewal Opportunities	The total Open Renewal Opportunities (Opportunity Status = Open and Opportunity Type Code = Renewal)
# of Opportunities	The total number of Opportunities
# of Renewal Opportunities	The total Renewal Opportunities (Opportunity Type Code = Renewal)
# of Unconverted Closed Opportunities	The total Closed Opportunities which were not created by converting the Leads.
# of Unconverted Opportunities	The total Opportunities which were not created by converting the Leads.
# of Unconverted Won Opportunities	The total Won Opportunities which were not created by converting the Leads.
# of Won Expansion Opportunities	The total Won Expansion Opportunities (Opportunity Status = Won and Opportunity Type Code = Expansion)
# of Won New Opportunities	The total Won New Opportunities (Opportunity Status = Won and Opportunity Type Code = New)
# of Won Opportunities	The total Won Opportunities (Opportunity Status = Won)
# of Won Renewal Opportunities	The total Won Renewal Opportunities (Opportunity Status = Won and Opportunity Type Code = Renewal)

Metric	Metric Definition
# of No Sale New Opportunities	The total No Sale New Opportunities (Opportunity Status = No Sale and Opportunity Type Code = New)
Average # of Days to Close	Average number of days to Close an Opportunity. This metric is computed as follows: Total days needed to close Opportunities/# of Open Opportunities
Average # of Days to Open	Average number of days the Opportunity is Open. This metric is computed as follows: Total days the Opportunity is Open/# of Open Opportunities
Average Age of Closed Opportunities	Average Age of Closed Opportunities. This metric is computed as follows: Total Closed Opportunities Age/# of Closed Opportunities
Average Age of Converted Opportunity	Average Age of Converted Opportunities. This metric is computed as follows: sum(Opportunity Close Date - Opportunity Creation Date)/# of Converted Closed Opportunities
Average Age of Converted Won Opportunity	Average Age of Converted Won Opportunities. This metric is computed as follows: sum(Opportunity Close Date - Opportunity Creation Date)/# of Converted Won Opportunities
Average Age of Lost Opportunities	Average Age of Lost Opportunities. This metric is computed as follows: Total Lost Opportunities Age/# of Lost Opportunities
Average Age of No Sale Opportunities	Average Age of No Sale Opportunities. This metric is computed as follows: Total No Sale Opportunities Age/ number of No Sale Opportunities
Average Age of Unconverted Opportunity	Average Age of Unconverted Opportunities. This metric is computed as follows: sum(Opportunity Close Date - Opportunity Creation Date)/# of Unconverted Closed Opportunities
Average Age of Unconverted Won Opportunity	Average Age of Unconverted Won Opportunities. This metric is computed as follows: sum(Opportunity Close Date - Opportunity Creation Date)/# of Unconverted Won Opportunities
Average Age of Won Opportunities	Average Age of Won Opportunities. This metric is computed as follows: Total Won Opportunities Age/# of Won Opportunities
Average Opportunity Win Probability	Average probability to Win the Opportunity. This metric is computed as follows: Total win probabilities/# of Opportunities
Competitive Loss Rate	Rate of Losing Competitive Opportunities. This metric is computed as follows: 100 * Total Competitive Lost Opportunities/Total Competitive Closed Opportunities
Competitor Conversion Rate	Rate of Converting Competitive Opportunities. This metric is computed as follows: 100 * Total Competitive Won Opportunities/Total Competitive Opportunities
Competitor Win Rate	Rate of Winning Competitive Opportunities. This metric is computed as follows: 100 * Total Competitive Won Opportunities/Total Competitive Won and Lost Opportunities
Conversion Rate	Rate of Converting Opportunities. This metric is computed as follows: 100 * Total Won Opportunities/ Total Opportunities

Metric	Metric Definition
Converted Lead Contribution to Closed Opportunities %	The ratio of Converted Closed Opportunities (created from Leads) in all the Closed Opportunities. This metric is computed as follows: $(\# \text{ of Converted Closed Opportunities} / \# \text{ of Closed Opportunities}) * 100$
Converted Lead Contribution to Opportunities %	The ratio of Converted Opportunities (created from Leads) in all the Opportunities. This metric is computed as follows: $(\# \text{ of Converted Opportunities} / \# \text{ of Opportunities}) * 100$
Converted Lead Contribution to Won Opportunities %	The ratio of Converted Won Opportunities (created from Leads) in all the Won Opportunities. This metric is computed as follows: $(\# \text{ of Converted Won Opportunities} / \# \text{ of Won Opportunities}) * 100$
Converted Lead Contribution to Lost Opportunities %	The ratio of Converted Lost Opportunities (created from Leads) in all the Lost Opportunities. This metric is computed as follows: $(\# \text{ of Converted Lost Opportunities} / \# \text{ of Lost Opportunities}) * 100$
Expansion Opportunities Conversion Rate	The Conversion rate of the Expansion Opportunities. This metric is computed as follows: $(\# \text{ of Won Expansion Opportunities} / \# \text{ of Expansion Opportunities})$
Expansion Opportunities Loss Rate	The Loss rate of the Expansion Opportunities. This metric is computed as follows: $(\# \text{ of Lost Expansion Opportunities} / \# \text{ of Won+Lost Expansion Opportunities})$
Expansion Opportunities Win Rate	The Win Rate of the Expansion Opportunities. This metric is computed as follows: $(\# \text{ of Won Expansion Opportunities} / \# \text{ of Won+Lost Expansion Opportunities})$
Loss Rate	Rate of Losing Opportunities. This metric is computed as follows: $100 * \text{Total Lost Opportunities} / \text{Total Won and Lost Opportunities}$
New Opportunities Conversion Rate	The Conversion rate of the New Opportunities. This metric is computed as follows: $(\# \text{ of Won New Opportunities} / \# \text{ of New Opportunities})$
New Opportunities Loss Rate	The Loss rate of the New Opportunities. This metric is computed as follows: $(\# \text{ of Lost New Opportunities} / \# \text{ of Won+Lost New Opportunities})$
New Opportunities Win Rate	The Win Rate of the New Opportunities. This metric is computed as follows: $(\# \text{ of Won New Opportunities} / \# \text{ of Won+Lost New Opportunities})$
Ratio of # of lost Opportunities (unconverted) to Converted Lost Opportunities	The ratio of Unconverted Lost Opportunities to Converted Lost Opportunities. This metric is computed as follows: $(\# \text{ of Lost Opportunities} - \# \text{ of Converted Lost Opportunities}) / \# \text{ of Converted Lost Opportunities}$
Renewal Opportunities Conversion Rate	The Conversion rate of the Renewal Opportunities. This metric is computed as follows: $(\# \text{ of Won Renewal Opportunities} / \# \text{ of renewal Opportunities})$
Renewal Opportunities Loss Rate	The Loss rate of the Renewal Opportunities. This metric is computed as follows: $(\# \text{ of Lost Renewal Opportunities} / \# \text{ of Won+Lost renewal Opportunities})$
Renewal Opportunities Win Rate	The Win Rate of the Renewal Opportunities. This metric is computed as follows: $(\# \text{ of Won Renewal Opportunities} / \# \text{ of Won+Lost renewal Opportunities})$
Win Rate	Rate of Winning Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Won and Lost Opportunities}$



## CX - Opportunity Activity

This table describes the Opportunity Activity Metrics.

Metric	Metric Definition
# of Completed Opportunity Activities	The total Completed Activities associated Opportunities (Activity Status = Complete)
# of Expired Opportunity Activities	The total Expired Activities associated to Opportunities (Activity Status not equal to Complete/Cancelled & Current Date > Activity Due Date)
# of Open Opportunity Activities	The total Open Activities associated to Opportunities (Activity Status not equal to Complete/Cancelled)
# of Opportunity Activities	The total Activities associated to Opportunities
# of Opportunity Appointments	The total Tasks associated to Appointments (Activity function = Appointments)
# of Opportunity Call Reports	The total Tasks associated to Call Reports (Activity function = Call Reports)
# of Opportunity Tasks	The total Tasks associated to Opportunities (Activity function = Task)
Activity Rate - Lost Opportunities	The rate of Activities for Lost Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Activity Rate - No Sale Opportunities	The rate of Activities for No Sale Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$
Activity Rate - Open Opportunities	The rate of Activities for Open Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for Open Opportunities} / \# \text{ of Open Opportunities}$
Activity Rate - Opportunities	The rate of Activities for Opportunities. This metric is computed as follows: $100 * \# \text{ of Opportunity Activities} / \# \text{ of Opportunities}$
Activity Rate - Won Opportunities	The rate of Activities for Won Opportunities. This metric is computed as follows: $100 * \# \text{ of Activities for Won Opportunities} / \# \text{ of Won Opportunities}$
Appointment Rate - Lost Opportunities	The rate of Appointments for Lost Opportunities. This metric is computed as follows: $100 * \# \text{ of Appointments for Lost Opportunities} / \# \text{ of Lost Opportunities}$
Appointment Rate - No Sale Opportunities	The rate of Appointments for No Sale Opportunities. This metric is computed as follows: $100 * \# \text{ of Appointments for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$
Appointment Rate - Open Opportunities	The rate of Appointments for Open Opportunities. This metric is computed as follows: $100 * \# \text{ of Appointments for Open Opportunities} / \# \text{ of Open Opportunities}$
Appointment Rate - Won Opportunities	The rate of Appointments for Won Opportunities. This metric is computed as follows: $100 * \# \text{ of Appointments for Won Opportunities} / \# \text{ of Won Opportunities}$
Average Activity Duration for Completed Activities	The average time taken to complete an activity. This metric is computed as follows: $\text{Activity duration for completed activity} / \# \text{ of Completed Activities}$



Metric	Metric Definition
Average Activity Duration For Open Activities	The average time of an activity. This metric is computed as follows: Activity duration for Activities not in Cancelled or Complete status/# of Activities not in Cancelled or Complete status
Average Number of Calls for Lost Opportunities	The average number of Calls for Lost Opportunities. This metric is computed as follows: # of Activities of type code = Calls for Lost Opportunities/# of Lost Opportunities
Average Number of Calls for Won Opportunities	The average number of Calls for Won Opportunities. This metric is computed as follows: # of Activities of type code = Calls for Won Opportunities/# of Won Opportunities
Average Number of Demos for Lost Opportunities	The average number of Demos for Lost Opportunities. This metric is computed as follows: # of Activities of type code = Demos for Lost Opportunities/# of Lost Opportunities
Average Number of Demos for Won Opportunities	The average number of Demos for Won Opportunities. This metric is computed as follows: # of Activities of type code = Demos for Won Opportunities/# of Won Opportunities
Average Number of Emails Sent for Lost Opportunities	The average number of Emails sent for Lost Opportunities. This metric is computed as follows: # of Activities of type code = Email for Lost Opportunities/# of Lost Opportunities
Average Number of Emails Sent for Won Opportunities	The average number of Emails sent for Won Opportunities. This metric is computed as follows: # of Activities of type code = Email for Won Opportunities/# of Won Opportunities
Average Number of Meetings for Lost Opportunities	The average number of Meetings for Lost Opportunities. This metric is computed as follows: # of Activities of type code = Meetings for Lost Opportunities/# of Lost Opportunities
Average Number of Meetings for Won Opportunities	The average number of Meetings for Won Opportunities. This metric is computed as follows: # of Activities of type code = Meetings for Won Opportunities/# of Won Opportunities
Average Number of Opportunity Activities Per Team Member	The average number of Opportunity Activities per Team member
Call Report Rate - Lost Opportunities	The rate of Call Reports for Lost Opportunities. This metric is computed as follows: 100 * # of Call Reports for Lost Opportunities/# of Lost Opportunities
Call Report Rate - No Sale Opportunities	The rate of Call Reports for No Sale Opportunities. This metric is computed as follows: 100 * # of Call Reports for No Sale Opportunities/# of No Sale Opportunities
Call Report Rate - Open Opportunities	The rate of Call Reports for Open Opportunities. This metric is computed as follows: 100 * # of Call Reports for Open Opportunities/# of Open Opportunities
Call Report Rate - Won Opportunities	The rate of Call Reports for Won Opportunities. This metric is computed as follows: 100 * # of Call Reports for Won Opportunities/# of Won Opportunities
Task Rate - Lost Opportunities	The rate of Tasks for Lost Opportunities. This metric is computed as follows: 100 * # of Tasks for Lost Opportunities/# of Lost Opportunities

Metric	Metric Definition
Task Rate - No Sale Opportunities	The rate of Tasks for No Sale Opportunities. This metric is computed as follows: $100 * \# \text{ of Tasks for No Sale Opportunities} / \# \text{ of No Sale Opportunities}$
Task Rate - Open Opportunities	The rate of Tasks for Open Opportunities. This metric is computed as follows: $100 * \# \text{ of Tasks for Open Opportunities} / \# \text{ of Open Opportunities}$
Task Rate - Won Opportunities	The rate of Tasks for Won Opportunities. This metric is computed as follows: $100 * \# \text{ of Tasks for Won Opportunities} / \# \text{ of Won Opportunities}$

## CX - Opportunity Quote

This table describes the Opportunity Quotes Metrics.

Metric	Metric Definition
# of Active Quotes	The total number of Active Quotes
# of Active Quotes with Proposal	The total number of Active Quotes with Proposal
# of Closed Active Quotes	The total number of Active Quotes Closed (Won+Lost)
# of Expired Quotes	The total number of Expired Quotes
# of In-Progress Active Quotes	The total number of Active In-Progress Quotes
# of Lost Active Quotes	The total number of Active Quotes Lost
# of Quotes	The total number of Quotes
# of Unique Quotes	The total number of Unique Quotes (based on External Quote number, ignores Quotes versions and treats Quotes with same Quote id as one)
# of Won Active Quotes	The total number of Active Quotes Won
Active Quote Conversion Rate	The rate of converting the Active Quotes. This metric is computed as follows: $100 * \# \text{ of Closed Quotes} / \# \text{ of Active Quotes}$
Active Quote Loss Rate	The rate of losing Active Quotes. This metric is computed as follows: $100 * \# \text{ of Lost Quotes} / \# \text{ of Closed Quotes}$
Active Quote to Contract Start Time	The time to start the Contract after the Quote is created. This metric is computed as follows: $(\text{Contract Start Date} - \text{Quote Creation Date}) / \# \text{ of Active Quotes}$
Active Quote To Lost Opportunity Time	The average time between Lost Opportunity Close Date and Quote creation date. This metric is computed as follows: $(\text{Opportunity Close Date} - \text{Quote Creation Date}) / \# \text{ of Active Quotes for Lost Opportunities}$
Active Quote To Won Opportunity Time	The average time between Won Opportunity Close Date and Quote creation date. This metric is computed as follows: $(\text{Opportunity Close Date} - \text{Quote Creation Date}) / \# \text{ of Active Quotes for Won Opportunities}$
Active Quote Win Rate	The rate of winning Active Quotes. This metric is computed as follows: $100 * \# \text{ of Won Quotes} / \# \text{ of Closed Quotes}$
Average # of Quotes for Lost Opportunities	The average number of Quotes for Lost Opportunities. This metric is computed as follows: $\# \text{ of Quotes} / \# \text{ of Lost Opportunities}$

Metric	Metric Definition
Average # of Quotes for No-Sale Opportunities	The average number of Quotes for No Sale Opportunities. This metric is computed as follows: # of Quotes/# of No-Sale Opportunities
Average # of Quotes for Open Opportunities	The average number of Quotes for Open Opportunities. This metric is computed as follows: # of Quotes/# of Open Opportunities
Average # of Quotes for Won Opportunities	The average number of Quotes for Won Opportunities. This metric is computed as follows: # of Quotes/# of Won Opportunities
Average Active Quote Cycle Time	The average Quote Cycle Time. This metric is computed as follows: (Quote Order Placed on Date - Quote Creation Date)/# of Active Quotes
Average Contract Value (Active Quotes)	The average Contract value per Active Quote. This metric is computed as follows: Total Contract Value/# of Active Quotes
Average Length of Contract (Active Quote)	The average Length of the Contract. This metric is computed as follows: (Contract End Date - Contract Start Date)/# of Active Quotes
Average Non Recurring Revenue (Active Quotes)	The average Non-Recurring Revenue Amount from Active Quotes. This metric is computed as follows: Total Non-Recurring Revenue Amount/# of Active Quotes
Average Number of Active Quote Iterations	The average number of Quotes created per Active Quote. This metric is computed as follows: # of Quotes/# of Active Quotes
Average Opportunity to Current Active Quote Time	The average time between Opportunity and Quote creation date. This metric is computed as follows: (Quote Creation Date - Opportunity Creation Date)/# of Active Quotes
Average Recurring Revenue (Active Quotes)	The average Recurring Revenue Amount from Active Quotes. This metric is computed as follows: Total Recurring Revenue Amount/# of Active Quotes
Average Usage Revenue (Active Quotes)	The average Usage Revenue Amount from Active Quotes. This metric is computed as follows: Total Usage Revenue Amount/# of Active Quotes
Contract Value (Active Quotes)	The total Quote Contract value in Active Quotes
Non Recurring Revenue Amount (Active Quotes)	The total Non-Recurring Revenue Amount from Active Quotes
Raw Contract Value	The total Quote Contract value in all Quotes
Raw Non Recurring Revenue Amount	The total Non-Recurring Revenue Amount from all Quotes
Raw Recurring Revenue Amount	The total Recurring Revenue Amount from all Quotes
Raw Usage Revenue Amount	The total Usage Revenue Amount from all Quotes
Recurring Revenue Amount (Active Quotes)	The total Recurring Revenue Amount from Active Quotes
Usage Revenue Amount (Active Quotes)	The total Usage Revenue Amount from Active Quotes

## CX - Opportunity Quote Lines

This table describes the Opportunity Quote Line Metrics.

Metric	Metric Definition
# of Active Quotes with Lines	The total Active Quotes with atleast one Quote Line
# of Closed Lines for Active Quotes	The total Closed (Won+Lost) Quote Lines from Active Quotes
# of In-Progress Lines for Active Quotes	The total In-Progress Quote Lines from Active Quotes
# of Lines for Active Quotes	The total Quote Lines from Active Quotes
# of Lost Lines for Active Quotes	The total Lost Quote Lines from Active Quotes
# of Quotes with Lines	The total Quotes with atleast one Quote Line
# of Unique Quotes with Lines	The Unique Quotes with atleast one Quote Line
# of Won Lines for Active Quotes	The total Won Quote Lines from Active Quotes
Average Contract Line Value for Active Quotes	The Average Contract Value (Total Contract Value / # of Quote Lines)
Average Length of the Contract for Active Quote Lines	The average Length of the Contract. This metric is computed as follows: (Quote Line Contract Start Date - Quote Line Contract End Date) / (# of Lines for Active Quotes)
Average Line Cycle Time for Active Quotes	The average Quote Line Cycle Time. This metric is computed as follows: (Quote Order Placed on Date - Quote Creation Date)/(# of Lines for Active Quotes)
Average Non-Recurring Line Revenue for Active Quotes	The Average Non-Recurring Revenue (Total Non-Recurring Revenue Amount / # of Quote Lines)
Average Recurring Line Revenue for Active Quotes	The Average Recurring Revenue (Total Recurring Revenue Amount / # of Quote Lines)
Average Usage Line Revenue for Active Quotes	The Average Usage Revenue Amount (Total Usage REvenue/ # of Quote Lines)
Contract Line Value for Active Quotes	The total Contract value (Sum of Recurring Revenue, Non-Recurring Revenue and Usage Revenue) of Qutoe Lines from Active Quotes
Line Conversion Rate for Active Quotes	The Quote Line Conversion Rate (# of Won Lines for Active Quotes / # of Lines for Active Quotes *100)
Line Loss Rate for Active Quotes	The Quote Line Loss Rate (# of Lost Lines for Active Quotes) / ( # of Closed Lines for Active Quotes) *100
Line Win Rate for Active Quotes	The Quote Line Win Rate (# of Won Lines for Active Quotes) / ( # of Closed Lines for Active Quotes) *100
Non-Recurring Line Revenue for Active Quotes	The total Non-Recurring Revenue of a Quote Line from Active Quotes
Raw Quote Line Non-Recurring Revenue	Total Non Recurring Revenue amount of Quote Lines
Raw Quote Line Recurring Revenue	Total Recurring Revenue amount of Quote Lines
Raw Quote Line Usage Revenue	Total Usage Revenue amount of Quote Lines
Raw Quote Line Contract Value	Total Contract Value of Quote Lines
Recurring Line Revenue for Active Quotes	The total Recurring Revenue of a Quote Line from Active Quotes
Usage Line Revenue for Active Quotes	The total Usage Revenue of a Quote Line from Active Quotes

## CX - Opportunity Revenue Line

These metrics are used in the Document Currency (DC), CX Currency (CC), and Analytics Currency (AC) fact folder in this subject area.

Document Currency is the currency used while entering the data in the application. CX Currency is the currency defined in Oracle CRM. Analytics Currency is the currency defined in Fusion Analytics Warehouse. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Opportunity Expected Close Date to convert to the analytics currency. Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Competitive Opportunity Revenue Lines	The total Opportunity Revenue Lines with atleast one Competitor
# of Expansion Opportunity Revenue Lines	The total Expansion Opportunity Revenue Lines
# of Expired Opportunity Revenue Lines	The total Expired Opportunity Revenue Lines with atleast one Competitor
# of Lost Competitive Opportunity Revenue Lines	The total Lost Opportunity Revenue Lines with atleast one Competitor
# of Lost Opportunity Revenue Lines	The total Lost Opportunity Revenue Lines (Revenue Status = Lost)
# of New Opportunity Revenue Lines	The total New Opportunity Revenue Lines
# of No Sale Competitive Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines with atleast one Competitor
# of No Sale Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines (Revenue Status = No Sale)
# of Open Competitive Opportunity Revenue Lines	The total Open Opportunity Revenue Lines with atleast one Competitor
# of Open Opportunity Revenue Lines	The total Open Opportunity Revenue Lines (Revenue Status = Open)
# of Opportunity Revenue Lines	The total Opportunity Revenue Lines
# of Raw Opportunity Revenue Lines	The total Raw Opportunity Revenue Lines
# of Won Competitive Opportunity Revenue Lines	The total Won Opportunity Revenue Lines with atleast one Competitor
# of Won Opportunity Revenue Lines	The total Won Opportunity Revenue Lines (Revenue Status = Won)
# of Renewal Opportunity Revenue Lines	The total Renewal Opportunity Revenue Lines
% Change Average Won Opportunity Line Revenue Same Time Last Period	The % change in Average Won Opportunity Line Revenue compared to the Last Period, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Quarter	The % change in Average Won Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Year	The % change in Average Won Opportunity Line Revenue compared to the Last Year, at this time
% Change Lost Opportunity Line Revenue Same Time Last Period	The % change in Lost Opportunity Line Revenue compared to the Last Period, at this time
% Change Lost Opportunity Line Revenue Same Time Last Quarter	The % change in Lost Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Lost Opportunity Line Revenue Same Time Last Year	The % change in Lost Opportunity Line Revenue compared to the Last Year, at this time

Metric	Metric Definition
% Change No Sale Opportunity Line Revenue Same Time Last Period	The % change in No Sale Opportunity Line Revenue compared to the Last Period, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Quarter	The % change in No Sale Opportunity Line Revenue compared to the Last Quarter, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Year	The % change in No Sale Opportunity Line Revenue compared to the Last Year, at this time
% Change Open Opportunity Line Revenue Same Time Last Period	The % change in Open Opportunity Line Revenue compared to the Last Period, at this time
% Change Open Opportunity Line Revenue Same Time Last Quarter	The % change in Open Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Open Opportunity Line Revenue Same Time Last Year	The % change in Open Opportunity Line Revenue compared to the Last Year, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Period	The % change in Weighted Open Opportunity Line Revenue compared to the Last Period, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Quarter	The % change in Weighted Open Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Year	The % change in Weighted Open Opportunity Line Revenue compared to the Last Year, at this time
% Change Won Opportunity Line Revenue Same Time Last Period	The % change in Won Opportunity Line Revenue compared to the Last Period, at this time
% Change Won Opportunity Line Revenue Same Time Last Quarter	The % change in Won Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Won Opportunity Line Revenue Same Time Last Year	The % change in Won Opportunity Line Revenue compared to the Last Year, at this time
% Renewal Lost Opportunity Line Revenue	The % of Renewal Lost Opportunity Line Revenue of the total Lost Opportunity Line Revenue. This metric is computed as follows: (Renewal Lost Opportunity Line Revenue / Lost Opportunity Line Revenue)
% Renewal Open Opportunity Line Revenue	The % of Renewal Open Opportunity Line Revenue of the total Open Opportunity Line Revenue. This metric is computed as follows: (Renewal Open Opportunity Line Revenue / Open Opportunity Line Revenue)
% Renewal Opportunity Line Revenue	The % of Renewal Opportunity Line Revenue of the total Opportunity Line Revenue. This metric is computed as follows: (Renewal Opportunity Line Revenue / Opportunity Line Revenue)
% Renewal Won Opportunity Line Revenue	The % of Renewal Won Opportunity Line Revenue of the total Won Opportunity Line Revenue. This metric is computed as follows: (Renewal Won Opportunity Line Revenue / Won Opportunity Line Revenue)
Average # of Days Open	The average number of days an Opportunity Revenue Line is Open. This metric is computed as follows: (Current Date - Open Opportunity Revenue Line Creation Date)/# of Open Opportunity Revenue Lines
Average Age of Lost Opportunity Revenue Lines	The average age of the Lost Opportunity Revenue Lines. This metric is computed as follows: sum(Lost Revenue Line Close Date - Lost Revenue Line Created Date)/# of Lost Opportunity Revenue Lines
Average Age of No Sale Opportunity Revenue Lines	The average age of the No Sale Opportunity Revenue Lines. This metric is computed as follows: sum(No Sale Revenue Line Close Date - No Sale Revenue Line Created Date)/# of No Sale Opportunity Revenue Lines

Metric	Metric Definition
Average Age of Opportunity Revenue Lines	The average age of the Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{Won/Lost/No Sale Revenue Line Close Date} - \text{Won/Lost/No Sale Revenue Line Created Date}) / \# \text{ of Won+Lost+No Sale Opportunity Revenue Lines}$
Average Age of Won Opportunity Revenue Lines	The average age of the Won Opportunity Revenue Lines. This metric is computed as follows: $\text{sum}(\text{Won Revenue Line Close Date} - \text{Won Revenue Line Created Date}) / \# \text{ of Won Opportunity Revenue Lines}$
Average Won Opportunity Line Revenue	The average Won Opportunity Line Revenue. This metric is computed as follows: $\text{Won Opportunity Line Revenue} / \# \text{ of Won Opportunity Revenue Lines}$
Competitive Opportunity Line Revenue	The total Opportunity Line Revenue with atleast one competitor
Expansion Lost Opportunity Line Revenue	The total Lost Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = Lost)
Expansion No Sale Opportunity Line Revenue	The total No Sale Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = No Sale)
Expansion Open Opportunity Line Revenue	The total Open Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = Open)
Expansion Opportunity Line Revenue	The total Expansion Opportunity Line Revenue (Revenue Type = Expansion)
Expansion Won Opportunity Line Revenue	The total Won Expansion Opportunity Line Revenue (Revenue Type = Expansion and Revenue Status = Won)
Expected Opportunity Line Revenue	The total Expected Opportunity Line Revenue
Expired Opportunity Line Revenue	The total Expired Opportunity Line Revenue (status = Open and Current Date > Expected Close date for Revenue Line)
Lost Competitive Opportunity Line Revenue	The total Lost Opportunity Line Revenue with atleast one competitor
Lost Opportunity Line Non-Recurring Revenue	The total Lost Opportunity Line Non-Recurring Revenue (Revenue Status = Lost)
Lost Opportunity Line Recurring Revenue	The total Lost Opportunity Line Recurring Revenue (Revenue Status = Lost)
Lost Opportunity Line Revenue	The total Lost Opportunity Line Revenue (Revenue Status = Lost)
Lost Opportunity Line Usage Revenue	The total Lost Opportunity Line Usage Revenue (Revenue Status = Lost)
New Lost Opportunity Line Revenue	The total Lost New Opportunity Line Revenue (Revenue Type = New and Revenue Status = Lost)
New No Sale Opportunity Line Revenue	The total No Sale New Opportunity Line Revenue (Revenue Type = New and Revenue Status = No Sale)
New Open Opportunity Line Revenue	The total Open New Opportunity Line Revenue (Revenue Type = New and Revenue Status = Open)
New Opportunity Line Revenue	The total New Opportunity Line Revenue (Revenue Type = New)
New Won Opportunity Line Revenue	The total Won New Opportunity Line Revenue (Revenue Type = New and Revenue Status = Won)



<b>Metric</b>	<b>Metric Definition</b>
No Sale Competitive Opportunity Line Revenue	The total No Sale Opportunity Line Revenue with atleast one competitor
No Sale Opportunity Line Non-Recurring Revenue	The total No Sale Opportunity Line Non-Recurring Revenue (Revenue Status = No Sale)
No Sale Opportunity Line Recurring Revenue	The total No Sale Opportunity Line Recurring Revenue (Revenue Status = No Sale)
No Sale Opportunity Line Revenue	The total No Sale Opportunity Line Revenue (Revenue Status = No Sale)
No Sale Opportunity Line Usage Revenue	The total No Sale Opportunity Line Usage Revenue (Revenue Status = No Sale)
Non-Renewal Lost Opportunity Line Revenue	The total Lost Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = Lost)
Non-Renewal No Sale Opportunity Line Revenue	The total No Sale Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = No Sale)
Non-Renewal Open Opportunity Line Revenue	The total Open Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = Open)
Non-Renewal Opportunity Line Revenue	The total Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew)
Non-Renewal Won Opportunity Line Revenue	The total Won Non-Renewal Opportunity Line Revenue (Revenue Type = Do not Renew and Revenue Status = Won)
Open Competitive Opportunity Line Revenue	The total Open Opportunity Line Revenue with atleast one competitor
Open Opportunity Line Non-Recurring Revenue	The total Open Opportunity Line Non-Recurring Revenue (Revenue Status = Open)
Open Opportunity Line Recurring Revenue	The total Open Opportunity Line Recurring Revenue (Revenue Status = Open)
Open Opportunity Line Revenue	The total Open Opportunity Line Revenue (Revenue Status = Open)
Open Opportunity Line Usage Revenue	The total Open Opportunity Line Usage Revenue (Revenue Status = Open)
Opportunity Line Non-Recurring Revenue	The total Opportunity Line Non-Recurring Revenue
Opportunity Line Recurring Revenue	The total Opportunity Line Recurring Revenue
Opportunity Line Revenue	The total Opportunity Line Revenue
Opportunity Line Split Revenue	The total Opportunity Line Split Revenue
Opportunity Line Usage Revenue	The total Opportunity Line Usage Revenue
Raw Opportunity Line Revenue	The total Raw Opportunity Line Revenue
Renewal Lost Opportunity Line Revenue	The total Lost Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = Lost)
Renewal No Sale Opportunity Line Revenue	The total No Sale Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = No Sale)
Renewal Open Opportunity Line Revenue	The total Open Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = Open)
Renewal Opportunity Line Revenue	The total Renewal Opportunity Line Revenue (Revenue Type = Renew)
Renewal Won Opportunity Line Revenue	The total Won Renewal Opportunity Line Revenue (Revenue Type = Renew and Revenue Status = Won)



Metric	Metric Definition
Revenue Line Competitive Conversion Rate	The Competitive Revenue Line conversion rate. This metric is computed as follows: $100 * \# \text{ of Won Competitive Revenue Lines} / \# \text{ of Competitive Opportunity Revenue Lines}$
Revenue Line Competitive Loss Rate	The Competitive Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost competitive Revenue Lines} / \# \text{ of Won+Lost Competitive Revenue Lines}$
Revenue Line Competitive Won Rate	The Competitive Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Competitive Revenue Lines} / \# \text{ of Won+Lost Competitive Revenue Lines}$
Revenue Line Conversion Rate	The Revenue Line conversion rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Opportunity Revenue Lines}$
Revenue Line Loss Rate	The Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$
Revenue Line Won Rate	The Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$
Weighted Open Opportunity Line Revenue	The total Weighted Opportunity Line Revenue. This metric is computed as follows: $\text{Open Opportunity Revenue} * \text{Win Probability}$
Won Competitive Opportunity Line Revenue	The total Won Opportunity Line Revenue with atleast one competitor
Won Opportunity Line Non-Recurring Revenue	The total Won Opportunity Line Non-Recurring Revenue (Revenue Status = Won)
Won Opportunity Line Recurring Revenue	The total Won Opportunity Line Recurring Revenue (Revenue Status = Won)
Won Opportunity Line Revenue	The total Won Opportunity Line Revenue (Revenue Status = Won)
Won Opportunity Line Usage Revenue	The total Won Opportunity Line Usage Revenue (Revenue Status = Won)

## CX - Opportunity Revenue Line Snapshot

These metrics are used in the Document Currency (DC), CX Currency (CC), and Analytics Currency (AC) fact folders in this subject area.

Document Currency is the currency used while entering the data in the application. CX Currency is the currency defined in Oracle CRM. Analytics Currency is the currency defined in Fusion Analytics Warehouse. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Opportunity Expected Close Date to convert to analytics currency. Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Competitive Opportunity Revenue Lines	The total Opportunity Revenue Lines with atleast one Competitor

Metric	Metric Definition
# of Expired Opportunity Revenue Lines	The total Expired Opportunity Revenue Lines with at least one Competitor
# of Lost Competitive Opportunity Revenue Lines	The total Lost Opportunity Revenue Lines with at least one Competitor
# of Lost Opportunity Revenue Lines	The total Lost Opportunity Revenue Lines (Revenue Status = Lost)
# of No Sale Competitive Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines with at least one Competitor
# of No Sale Opportunity Revenue Lines	The total No Sale Opportunity Revenue Lines (Revenue Status = No Sale)
# of Open Competitive Opportunity Revenue Lines	The total Open Opportunity Revenue Lines with at least one Competitor
# of Open Opportunity Revenue Lines	The total Open Opportunity Revenue Lines (Revenue Status = Open)
# of Opportunity Revenue Lines	The total Opportunity Revenue Lines
# of Raw Opportunity Revenue Lines	The total Raw Opportunity Revenue Lines
# of Won Competitive Opportunity Revenue Lines	The total Won Opportunity Revenue Lines with at least one Competitor
# of Won Opportunity Revenue Lines	The total Won Opportunity Revenue Lines (Revenue Status = Won)
% Change Average Won Opportunity Line Revenue Same Time Last Period	The % change in Average Won Opportunity Line Revenue compared to the Last Period, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Quarter	The % change in Average Won Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Average Won Opportunity Line Revenue Same Time Last Year	The % change in Average Won Opportunity Line Revenue compared to the Last Year, at this time
% Change Lost Opportunity Line Revenue Same Time Last Period	The % change in Lost Opportunity Line Revenue compared to the Last Period, at this time
% Change Lost Opportunity Line Revenue Same Time Last Quarter	The % change in Lost Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Lost Opportunity Line Revenue Same Time Last Year	The % change in Lost Opportunity Line Revenue compared to the Last Year, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Period	The % change in No Sale Opportunity Line Revenue compared to the Last Period, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Quarter	The % change in No Sale Opportunity Line Revenue compared to the Last Quarter, at this time
% Change No Sale Opportunity Line Revenue Same Time Last Year	The % change in No Sale Opportunity Line Revenue compared to the Last Year, at this time
% Change Open Opportunity Line Revenue Same Time Last Period	The % change in Open Opportunity Line Revenue compared to the Last Period, at this time
% Change Open Opportunity Line Revenue Same Time Last Quarter	The % change in Open Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Open Opportunity Line Revenue Same Time Last Year	The % change in Open Opportunity Line Revenue compared to the Last Year, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Period	The % change in Weighted Open Opportunity Line Revenue compared to the Last Period, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Quarter	The % change in Weighted Open Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Weighted Open Opportunity Line Revenue Same Time Last Year	The % change in Weighted Open Opportunity Line Revenue compared to the Last Year, at this time

Metric	Metric Definition
% Change Won Opportunity Line Revenue Same Time Last Period	The % change in Won Opportunity Line Revenue compared to the Last Period, at this time
% Change Won Opportunity Line Revenue Same Time Last Quarter	The % change in Won Opportunity Line Revenue compared to the Last Quarter, at this time
% Change Won Opportunity Line Revenue Same Time Last Year	The % change in Won Opportunity Line Revenue compared to the Last Year, at this time
Average # of Days Open	The average number of days an Opportunity Revenue Line is Open. This metric is computed as follows: (Current Date - Open Opportunity Revenue Line Creation Date)/# of Open Opportunity Revenue Lines
Average Age of Lost Opportunity Revenue Lines	The average age of the Lost Opportunity Revenue Lines. This metric is computed as follows: sum(Lost Revenue Line Close Date - Lost Revenue Line Created Date)/# of Lost Opportunity Revenue Lines
Average Age of No Sale Opportunity Revenue Lines	The average age of the No Sale Opportunity Revenue Lines (sum(No Sale Revenue Line Close Date - No Sale Revenue Line Created Date))/# of No Sale Opportunity Revenue Lines
Average Age of Opportunity Revenue Lines	The average age of the Opportunity Revenue Lines. This metric is computed as follows: sum(Won/Lost/No Sale Revenue Line Close Date - Won/Lost/No Sale Revenue Line Created Date))/# of Won+Lost+No Sale Opportunity Revenue Lines
Average Age of Won Opportunity Revenue Lines	The average age of the Won Opportunity Revenue Lines. This metric is computed as follows: sum(Won Revenue Line Close Date - Won Revenue Line Created Date))/# of Won Opportunity Revenue Lines
Average Won Opportunity Line Revenue	The average Won Opportunity Line Revenue. This metric is computed as follows: Won Opportunity Line Revenue/# of Won Opportunity Revenue Lines
Competitive Opportunity Line Revenue	The total Opportunity Line Revenue with atleast one competitor
Expected Opportunity Line Revenue	The total Expected Opportunity Line Revenue
Expired Opportunity Line Revenue	The total Expired Opportunity Line Revenue (status = Open and Current Date > Expected Close date for Revenue Line)
Lost Competitive Opportunity Line Revenue	The total Lost Opportunity Line Revenue with atleast one competitor
Lost Opportunity Line Revenue	The total Lost Opportunity Line Revenue (Revenue Status = Lost)
No Sale Competitive Opportunity Line Revenue	The total No Sale Opportunity Line Revenue with atleast one competitor
No Sale Opportunity Line Revenue	The total No Sale Opportunity Line Revenue (Revenue Status = No Sale)
Open Competitive Opportunity Line Revenue	The total Open Opportunity Line Revenue with atleast one competitor
Open Opportunity Line Revenue	The total Open Opportunity Line Revenue (Revenue Status = Open)
Opportunity Line Revenue	The total Opportunity Line Revenue
Opportunity Line Split Revenue	The total Opportunity Line Split Revenue
Raw Opportunity Line Revenue	The total Raw Opportunity Line Revenue

Metric	Metric Definition
Revenue Line Competitive Conversion Rate	The Competitive Revenue Line conversion rate. This metric is computed as follows: $100 * \# \text{ of Won Competitive Revenue Lines} / \# \text{ of Competitive Opportunity Revenue Lines}$
Revenue Line Competitive Loss Rate	The Competitive Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost competitive Revenue Lines} / \# \text{ of Won+Lost Competitive Revenue Lines}$
Revenue Line Competitive Won Rate	The Competitive Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Competitive Revenue Lines} / \# \text{ of Competitive Won+Lost Opportunity Revenue Lines}$
Revenue Line Conversion Rate	The Revenue Line conversion rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Opportunity Revenue Lines}$
Revenue Line Loss Rate	The Revenue Line Loss rate. This metric is computed as follows: $100 * \# \text{ of Lost Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$
Revenue Line Won Rate	The Revenue Line Win rate. This metric is computed as follows: $100 * \# \text{ of Won Opportunity Revenue Lines} / \# \text{ of Won+Lost Opportunity Revenue Lines}$
Weighted Open Opportunity Line Revenue	The total Weighted Opportunity Line Revenue. This metric is computed as follows: $\text{Open Opportunity Revenue} * \text{Win Probability}$
Won Competitive Opportunity Line Revenue	The total Won Opportunity Line Revenue with atleast one competitor
Won Opportunity Line Revenue	The total Won Opportunity Line Revenue (Revenue Status = Won)
# of Changes to Expected Enterprise Line Close Date	The total number of times the Revenue Line Expected Close Date has been changed for the Opportunity when the snapshot was taken. (Note - this depends on the snapshot frequency e.g. if the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured).
# of Changes to Expected Enterprise Line Close Period	The total number of times the Revenue Line Expected Close Period has been changed for the Opportunity when the snapshot was taken. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured).
# of Changes to Expected Enterprise Line Close Quarter	The total number of times the Revenue Line Expected Close Quarter has been changed for the Opportunity when the snapshot was taken. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured).
# of Changes to Expected Enterprise Line Close Year	The total number of times the Revenue Line Expected Close Year has been changed for the Opportunity when the snapshot was taken. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured).
# of times Revenue Line Amount Changed	The total number of times the Revenue Line Amount changed when the snapshot was taken.

<b>Metric</b>	<b>Metric Definition</b>
# of times Revenue Line Amount Increased	The total number of times the Revenue Line Account increased when the snapshot was taken.
# of times Revenue Line Amount Decreased	The total number of times the Revenue Line Account decreased when the snapshot was taken.
# of Changes to Expected Enterprise Line Close Date	The total number of times the Revenue Line Expected Close Date has been changed for the Opportunity when the snapshot was taken.
# of Changes to Expected Enterprise Line Close Period	The total number of times the Revenue Line Expected Close Period has been changed for the Opportunity when the snapshot was taken.
# of Changes to Expected Enterprise Line Close Quarter	The total number of times the Revenue Line Expected Close Quarter has been changed for the Opportunity when the snapshot was taken.
# of Changes to Expected Enterprise Line Close Year	The total number of times the Revenue Line Expected Close Year has been changed for the Opportunity when the snapshot was taken.
# of Revenue Lines moved out	The total Revenue Lines moved out of the period/quarter/year when the snapshot was taken.
# of Revenue Lines moved to the n+1 period/quarter/year	The total Revenue Lines moved out of the period/quarter/year to the next (n+1) time level when the snapshot was taken (n=Current Enterprise Period).
# of Revenue Lines moved to the n+2 period/quarter/year	The total Revenue Lines moved out of the period/quarter/year to the next to next (n+2) time level when the snapshot was taken (n=Current Enterprise Period).
# of Revenue Lines moved to the n+3 period/quarter/year	The total Revenue Lines moved out of the period/quarter/year to the next to next to next (n+3) time level when the snapshot was taken (n=Current Enterprise Period).
# of New Revenue Lines added	The total New Revenue Lines added to the period/quarter/year when the snapshot was taken.
# of Existing Revenue Lines added	The total Existing Revenue Lines added to the period/quarter/year when the snapshot was taken.
# of Revenue Lines added	The total Revenue Lines added to the period/quarter/year when the snapshot was taken.
# of times Revenue Line Amount Changed	The total number of times the Revenue Line Amount changed when the snapshot was taken.
# of times Revenue Line Amount Increased	The total number of times the Revenue Line Amount increased when the snapshot was taken.
# of times Revenue Line Amount Decreased	The total number of times the Revenue Line Amount decreased when the snapshot was taken.

## CX - Opportunity Snapshot

This table describes the Opportunity Snapshot Metrics.

<b>Metric</b>	<b>Metric Definition</b>
# of Accounts with Won Opportunities	The total Accounts with Won Opportunities
# of Competitive Lost Opportunities	The total Lost Opportunities with atleast one Competitor
# of Competitive No Sale Opportunities	The total No Sale Opportunities with atleast one Competitor

Metric	Metric Definition
# of Competitive Open Opportunities	The total Open Opportunities with atleast one Competitor
# of Competitive Opportunities	The total Opportunities with atleast one Competitor
# of Competitive Won Opportunities	The total Won Opportunities with atleast one Competitor
# of Expired Opportunities	The total Expired Opportunities (Opportunity Status = Open, Current Date > Opportunity Expected Close Date)
# of Lost Opportunities	The total Lost Opportunities in the system (Opportunity Status = Lost)
# of No Sale Opportunities	The total No Sale Opportunities in the system (Opportunity Status = No Sale)
# of Open Opportunities	The total Open Opportunities in the system (Opportunity Status = Open)
# of Opportunities	The total Opportunities
# of Won Opportunities	The total Won Opportunities in the system (Opportunity Status = Won)
Average # of Days Open	Average number of days the Opportunity is Open. This metric is computed as follows: Total days the Opportunity is Open/# of Open Opportunities
Average # of Days to Close	Average number of days to Close an Opportunity. This metric is computed as follows: Total days needed to close Opportunities/# of closed Opportunities
Average Age of Closed Opportunities	Average Age of Closed Opportunities. This metric is computed as follows: Total Closed Opportunities Age/# of Closed Opportunities
Average Age of Lost Opportunities	Average Age of Lost Opportunities. This metric is computed as follows: Total Lost Opportunities Age/# of Lost Opportunities
Average Age of No Sale Opportunities	Average Age of No Sale Opportunities. This metric is computed as follows: Total No Sale Opportunities Age/ number of No Sale Opportunities
Average Age of Won Opportunities	Average Age of Won Opportunities. This metric is computed as follows: Total Won Opportunities Age/# of Won Opportunities
Average Opportunity Win Probability	Average probability to Win the Opportunity. This metric is computed as follows: Total win probabilities/# of Opportunities
Competitive Loss Rate	Rate of Losing Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Lost Opportunities} / \text{Total Competitive Closed Opportunities}$
Competitor Conversion Rate	Rate of Converting Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Opportunities}$
Competitor Win Rate	Rate of Winning Competitive Opportunities. This metric is computed as follows: $100 * \text{Total Competitive Won Opportunities} / \text{Total Competitive Won and Lost Opportunities}$
Conversion Rate	Rate of Converting Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Opportunities}$
Loss Rate	Rate of Losing Opportunities. This metric is computed as follows: $100 * \text{Total Lost Opportunities} / \text{Total Won and Lost Opportunities}$

Metric	Metric Definition
Win Rate	Rate of Winning Opportunities. This metric is computed as follows: $100 * \text{Total Won Opportunities} / \text{Total Won and Lost Opportunities}$
# of Changes to Expected Enterprise Close Date	The total number of times the Opportunity Expected Close Date changed for the Opportunity when the snapshot was taken. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured)
# of Changes to Expected Enterprise Close Period	The total number of times the Opportunity Expected Close Period changed for the Opportunity when the snapshot was taken. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured)
# of Changes to Expected Enterprise Close Quarter	The total number of times the Opportunity Expected Close Quarter changed for the Opportunity when the snapshot was taken. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured)
# of Changes to Expected Enterprise Close Year	The total number of times the Opportunity Expected Close Year changed for the Opportunity when the snapshot was taken. (Note - this depends on the snapshot frequency e.g. If the snapshot frequency is weekly, and there are multiple changes done before the weekly snapshot is taken, those cannot be captured)
# of Changes to Expected Enterprise Close Date	The total number of times the Opportunity Expected Close Date changed for the Opportunity when the snapshot was taken.
# of Changes to Expected Enterprise Close Period	The total number of times the Opportunity Expected Close Period changed for the Opportunity when the snapshot was taken.
# of Changes to Expected Enterprise Close Quarter	The total number of times the Opportunity Expected Close Quarter changed for the Opportunity when the snapshot was taken.
# of Changes to Expected Enterprise Close Year	The total number of times the Opportunity Expected Close Year changed for the Opportunity when the snapshot was taken.
# of Opportunities moved out	The total Opportunities moved out from the period/quarter/year when the snapshot was taken.
# of Opportunities moved out to the n+1 period/quarter/year	The total Opportunities moved out from the period/quarter/year to the next (n+1) time level when the snapshot was taken.
# of Opportunities moved to out the n+2 period/quarter/year	The total Opportunities moved out from the period/quarter/year to the next to next (n+2) time level when the snapshot was taken.
# of Opportunities moved out to the n+3 period/quarter/year	The total Opportunities moved out from the period/quarter/year to the next to next to next (n+3) time level when the snapshot was taken.
# of Opportunities added	The total Opportunities added to the period/quarter/year when the snapshot was taken.
# of New Opportunities added	The total New Opportunities added to the period/quarter/year when the snapshot was taken.



Metric	Metric Definition
# of Existing Opportunities added	The total Existing Opportunities added to the period/quarter/year when the snapshot was taken.

## CX - Opportunity Stage Progression

This table describes the Opportunity Stage Progression Metrics.

Metric	Metric Definition
# of Opportunities	The total Opportunities
# of Opportunities Across Stages	The total Opportunities across Stages
# of Progressed Opportunities	The total Progressed Opportunities
% Opportunities by Stage	The % of Opportunities in a stage of the total Opportunities
% Progressed	The Progressed Opportunity Percentage. This metric is computed as follows: # of Progressed Opportunities/# of Opportunities Across Stages
Average # of Days in Stage	The average number of days in a Sales stage. This metric is computed as follows: sum of days in stage/# of Opportunities
Average # of Days Stalled in Stage	The average number of stalled days in a Sales stage. This metric is computed as follows: sum of stalled days/# of Opportunities
Conversion Rate	The rate of converting Opportunities. This metric is computed as follows: $100 * \# \text{ of Won Opportunities} / \# \text{ of Opportunities}$
Loss Rate	The rate of losing Opportunities. This metric is computed as follows: $100 * \# \text{ of Lost opportunities} / \# \text{ of Won+Lost Opportunities}$
Win Rate	The rate of winning Opportunities. This metric is computed as follows: $100 * \# \text{ of Won opportunities} / \# \text{ of Won+Lost Opportunities}$

## CX - Service Request

This table describes the Service Request Metrics.

Metric	Metric Definition
# of Closed Critical SRs	The total number of Critical SRs that are in Closed status (status = Closed)
# of Closed SRs	The total number of Closed SRs (status = Closed)
# of Critical SRs	The total number of Critical SRs
# of High Severity SRs	The total number of High severity SRs (severity = High)
# of In Progress Critical SRs	The total number of Critical SRs that are In Progress status
# of In Progress SRs	The total number of in progress SRs (status = In Progress)
# of Initial Resource Assigned SRs	The total number of assigned SRs
# of Internal Resolved Closed SRs	The total number of SRs with Resolved or Closed status



Metric	Metric Definition
# of Low Severity SRs	The total number of Low severity SRs (severity = Low)
# of Medium Severity SRs	The total number of Medium severity SRs (severity = Medium)
# of New Critical SRs	The total number of Critical SRs that are in New status
# of New SRs	The total number of new SRs (status = New)
# of Open Critical SRs	The total number of Critical SRs that are Open (status = In Progress, New and Waiting)
# of Open High Severity Critical SRs	The total number of Critical SRs that are High severity and Open (status = In Progress, New and Waiting)
# of Open SRs	The total number of Open SRs (status = In Progress, New and Waiting)
# of Raw SRs	The total SRs in the system including the deleted ones (delete flag = Y)
# of Reopened SRs	The total number of SRs that are Reopened
# of Resolved Critical SRs	The total number of Critical SRs that are Resolved (status = Resolved)
# of Resolved SRs	The total number of SRs that are Resolved (status = Resolved)
# of SRs	The total number of SRs
# of SRs Pending Agent Action	The total number of SRs assigned to an Agent having status as In Progress or New
# of SRs Resolved in 24-48 hrs	The total number of SRs that were resolved in between 24-48 hours after they were opened
# of SRs Resolved in under 24 hrs	The total number of SRs that were resolved in under 24 hours after they were opened
# of SRs Transferred	Number of SR's that were transferred
# of Transfers	Number of times the SR's were transferred
# of Unassigned SRs	The total number of SRs that have not been assigned
# of Waiting Critical SRs	The total number of Critical SRs that are in Queue and waiting to be assigned (status = Waiting)
# of Waiting SRs	The total number of SRs that are in Queue and waiting to be assigned (status = Waiting)
% Reopened SRs	The % of now Closed SRs that were Reopened in SR lifecycle. This metric is computed as follows: (# of Reopened SRs that are in Closed state/# of Closed SRs)*100
% SRs Transferred	The total percentage of SR's that were transferred. This metric is computed as follows: 100*(# of SRs Transferred/# of SRs)
Average # of Transfers	The average number of times SR's were transferred. This metric is computed as follows: (# of Transfers/# of SRs Transferred)
Average Open SR Age (Days)	The average number of days a SRs is Open
Average Time to Assign to Resource(Days)	The average number of days to assign a resource to the SRs
Average Time to Assign to Resource(Hours)	The average number of hours to assign a resource to the SRs
Average Time to Assign to Resource(Mins)	The average number of minutes to assign a resource to the SRs
Average Time to Close (Days)	The average days to close the SRs

Metric	Metric Definition
Average Time to Close (Hours)	The average hours to close the SRs
Average Time to Close (Mins)	The average minutes to close the SRs
Average Time to Resolve (Days)	The average days to resolve the SRs
Average Time to Resolve (Hours)	The average hours to resolve the SRs
Average Time to Resolve (Mins)	The average minutes to resolve the SRs
Open SR Age (Days)	# of days since the SR was reported (doesn't apply for Closed/Resolved SRs)
SR Resolution Rate	The SRs Resolution rate. This metric is computed as follows: $100 * \# \text{ of Resolved} + \text{Closed SRs} / \# \text{ of SRs}$
Total Time to Assign to Queue (Days)	The total number of days to assign a SRs to a Queue
Total Time to Assign to Queue (Hours)	The total number of hours to assign a SRs to a Queue
Total Time to Assign to Queue (Mins)	The total number of minutes to assign a SRs to a Queue
Total Time to Assign to Resource(Days)	The total number of days to assign a resource to SRs
Total Time to Assign to Resource(Hours)	The total number of hours to assign a resource to SRs
Total Time to Assign to Resource(Mins)	The total number of minutes to assign a resource to SRs
Total Time to Close (Days)	The total number of days to close the SRs
Total Time to Close (Hours)	The total number of hours to close the SRs
Total Time to Close (Mins)	The total number of minutes to close the SRs
Total Time to Resolve (Days)	The total number of days to resolve a SRs
Total Time to Resolve (Hours)	The total number of hours to resolve a SRs
Total Time to Resolve (Mins)	The total number of minutes to resolve a SRs

## CX - Service Request Lifecycle

This table describes the B2B Service Request Lifecycle metrics.

Metric	Metric Definition
# of Distinct SR Assignees	The number of distinct resources an SR has been assigned to.
# of Distinct SR Queues Assigned	The number of distinct Queues the SR has been assigned to. (The initial Queue assignment is also counted).
# of Raw SRs (Lifecycle)	The total number of SRs tracked for Lifecycle changes, including the deleted SRs..
# of SR Lifecycle Changes	The total updates made to the SR (changes to Status, Severity, Queue assignment, and Resource Assignment).
# of SR Queue Assignments	The number of Queues the SR has been assigned to. (The initial Queue assignment and multiple assignments to the same queue is counted ).
# of SR Reopen Events	The number of times an SR has been reopened (after being resolved).
# of SR Resource Assignments	The number of resources an SR has been assigned to (multiple assignments to the same resource are counted).
# of SR Status Change Events	The number of times (occurrences) the SR status changes..
# of SRs (Lifecycle)	The total number of SRs tracked for Lifecycle changes.

Metric	Metric Definition
Average # of Distinct SR Assignees	The average number of distinct SR Assignees. This metric is calculated as follows: # of Distinct SR Assignees / # of SRs with at least one assignee.
Average # of Distinct SR Queues Assigned	The average number of distinct SR Queues. This metric is calculated as follows: # of Distinct SR Queues Assigned / # of SRs with Queue.
Average # of SR Queue Assignments	The average number of SR Queues. This metric is calculated as follows: # of SR Queues Assigned / # of SRs with Queue.
Average # of SR Resource Assignments	The average number of SR Resource Assignments. This metric is calculated as follows: # of SR Resource Assignments / # of SRs with at least one assignee.
Average Duration as High Severity SR (Days)	The total Duration as High Severity SR (Days) averaged over # of High Severity SRs. This metric is calculated as follows: Total Duration as High Severity SR (Days) / # of High Severity SRs.
Average Duration as High Severity SR (Hours)	The total Duration as High Severity SR (Hours) averaged over # of High Severity SRs. This metric is calculated as follows: Total Duration as High Severity SR (Hours) / # of High Severity SRs.
Average Duration as High Severity SR (Minutes)	The total Duration as High Severity SR (Minutes) averaged over # of High Severity SRs. This metric is calculated as follows: Total Duration as High Severity SR (Minutes) / # of High Severity SRs.
Average Duration as In Progress SR (Days)	The total Duration as In Progress SR (Days) averaged over # of In Progress SRs. This metric is calculated as follows: Total Duration as In Progress SR (Days) / # of In Progress SRs.
Average Duration as In Progress SR (Hours)	The total Duration as In Progress SR (Hours) averaged over # of In Progress SRs. This metric is calculated as follows: Total Duration as In Progress SR (Hours) / # of In Progress SRs.
Average Duration as In Progress SR (Minutes)	The total Duration as In Progress SR (Minutes) averaged over # of In Progress SRs. This metric is calculated as follows: Total Duration as In Progress SR (Minutes) / # of In Progress SRs.
Average Duration as Low Severity SR (Days)	The total Duration as Low Severity SR (Days) averaged over # of Low Severity SRs. This metric is calculated as follows: Total Duration as Low Severity SR (Days) / # of Low Severity SRs.
Average Duration as Low Severity SR (Hours)	The total Duration as Low Severity SR (Hours) averaged over # of Low Severity SRs. This metric is calculated as follows: Total Duration as Low Severity SR (Hours) / # of Low Severity SRs.
Average Duration as Low Severity SR (Minutes)	The total Duration as Low Severity SR (Minutes) averaged over # of Low Severity SRs. This metric is calculated as follows: Total Duration as Low Severity SR (Minutes) / # of Low Severity SRs.
Average Duration as Medium Severity SR (Days)	The total Duration as Medium Severity SR (Days) averaged over # of Medium Severity SRs. This metric is calculated as follows: Total Duration as Medium Severity SR (Days) / # of Medium Severity SRs.

Metric	Metric Definition
Average Duration as Medium Severity SR (Hours)	The total Duration as Medium Severity SR (Hours) averaged over # of Medium Severity SRs. This metric is calculated as follows: Total Duration as Medium Severity SR (Hours) / # of Medium Severity SRs.
Average Duration as Medium Severity SR (Minutes)	The total Duration as Medium Severity SR (Minutes) averaged over # of Medium Severity SRs. This metric is calculated as follows: Total Duration as Medium Severity SR (Minutes) / # of Medium Severity SRs.
Average Duration as New SR (Days)	The total Duration as New SR (Days) averaged over # of New SRs. This metric is calculated as follows: Total Duration as New SR (Days) / # of New SRs.
Average Duration as New SR (Hours)	The total Duration as New SR (Hours) averaged over # of New SRs. This metric is calculated as follows: Total Duration as New SR (Hours) / # of New SRs.
Average Duration as New SR (Minutes)	The total Duration as New SR (Minutes) averaged over # of New SRs. This metric is calculated as follows: Total Duration as New SR (Minutes) / # of New SRs.
Average Duration as Resolved SR until Reopen (Days)	The total Duration as Resolved SR until Reopen (Days) averaged over # of re - opened SRs. This metric is calculated as follows: Total Duration as Resolved SR until Reopen (Days) / # of Resolved SR until Reopen.
Average Duration as Resolved SR until Reopen (Hours)	The total Duration as Resolved SR until Reopen (Hours) averaged over # of re - opened SRs. This metric is calculated as follows: Total Duration as Resolved SR until Reopen (Hours) / # of Resolved SR until Reopen.
Average Duration as Resolved SR until Reopen (Minutes)	The total Duration as Resolved SR until Reopen (Minutes) averaged over # of re - opened SRs. This metric is calculated as follows: Total Duration as Resolved SR until Reopen (Minutes) / # of Resolved SR until Reopen.
Average Duration as Waiting SR (Days)	The total Duration as Waiting SR (Days) averaged over # of Waiting SRs. This metric is calculated as follows: Total Duration as Waiting SR (Days) / # of Waiting SRs.
Average Duration as Waiting SR (Hours)	The total Duration as Waiting SR (Hours) averaged over # of Waiting SRs.. This metric is calculated as follows: Total Duration as Waiting SR (Hours) / # of Waiting SRs.
Average Duration as Waiting SR (Minutes)	The total Duration as Waiting SR (Minutes) averaged over # of Waiting SRs. This metric is calculated as follows: Total Duration as Waiting SR (Minutes) / # of Waiting SRs.
Average Duration in SR Queue (Days)	The total Duration in SR Queue (Days) averaged over # of SRs that have traversed that queue. This metric is calculated as follows: Total Duration in SR Queue (Days) / # of SRs in Queue .
Average Duration in SR Queue (Hours)	The total Duration in SR Queue (Hours) averaged over # of SRs that have traversed that queue. This metric is calculated as follows: Total Duration in SR Queue (Hours) / # of SRs in Queue .
Average Duration in SR Queue (Minutes)	The total Duration in SR Queue (Days) averaged over # of SRs that have traversed that queue. This metric is calculated as follows: Total Duration in SR Queue (Minutes) / # of SRs in Queue .

Metric	Metric Definition
Average Duration of SR Lifecycle Change (Days)	The average duration in days that an SR is with a particular status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource. This metric is calculated as follows: Total Duration of SR Lifecycle Change (Days) / # of SRs tracked for Lifecycle changes.
Average Duration of SR Lifecycle Change (Hours)	The average duration in hours that an SR is with a particular status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource. This metric is calculated as follows: Total Duration of SR Lifecycle Change (Hours) / # of SRs tracked for Lifecycle changes.
Average Duration of SR Lifecycle Change (Minutes)	The average duration in minutes that an SR is with a particular status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource. This metric is calculated as follows: Total Duration of SR Lifecycle Change (Minutes) / # of SRs tracked for Lifecycle changes.
Average Duration SR Unassigned to Assignee (Days)	The total duration an SR is Unassigned to any Assignee (Days). This metric is calculated as follows: Total Duration SR Unassigned to Assignee (Days) / # of SRs not assigned to an Assignee (SRs where the Assignee field is blank).
Average Duration SR Unassigned to Assignee (Hours)	The total duration an SR is Unassigned to any Assignee (Hours). This metric is calculated as follows: Total Duration SR Unassigned to Assignee (Hours) / # of SRs not assigned to an Assignee (SRs where the Assignee field is blank).
Average Duration SR Unassigned to Assignee (Minutes)	The total duration an SR is Unassigned to any Assignee (Minutes). This metric is calculated as follows: Total Duration SR Unassigned to Assignee (Minutes) / # of SRs not assigned to an Assignee (SRs where the Assignee field is blank).
Average Duration SR Unassigned to Queue (Days)	The total duration an SR is Unassigned to any Queue (Days). This metric is calculated as follows: Total Duration SR Unassigned to Queue (Days) / # of SRs not assigned to a Queue (SRs where the Queue field is blank).
Average Duration SR Unassigned to Queue (Hours)	The total duration an SR is Unassigned to any Queue (Hours). This metric is calculated as follows: Total Duration SR Unassigned to Queue (Hours) / # of SRs not assigned to a Queue (SRs where the Queue field is blank).
Average Duration SR Unassigned to Queue (Minutes)	The total duration an SR is Unassigned to any Queue (Minutes). This metric is calculated as follows: Total Duration SR Unassigned to Queue (Minutes) / # of SRs not assigned to a Queue (SRs where the Queue field is blank).
Average Duration with SR Assignee (Days)	The total Duration with SR Assignee (Days) averaged over # of SRs assigned to the resource at least once. This metric is calculated as follows: Total Duration with SR Assignee (Days) / # of SRs with Assignees.

Metric	Metric Definition
Average Duration with SR Assignee (Hours)	The total Duration with SR Assignee (Hours) averaged over # of SRs assigned to the resource at least once. This metric is calculated as follows: Total Duration with SR Assignee (Hours) / # of SRs with Assignees.
Average Duration with SR Assignee (Minutes)	The total Duration with SR Assignee (Minutes) averaged over # of SRs assigned to the resource at least once. This metric is calculated as follows: Total Duration with SR Assignee (Minutes) / # of SRs with Assignees.
Maximum Change End Date	The End time of association of an SR with a tracked attribute such as Assignee, Queue, Severity, Status or Status Type..
Minimum Change Start Date	The Start time of association of an SR with a tracked attribute such as Assignee, Queue, Severity, Status or Status Type..
Total Duration as High Severity SR (Days)	The total duration in days that SR Severity is High (Sev Code = ORA_SVC_SEV1).
Total Duration as High Severity SR (Hours)	The total duration in hours that SR Severity is High (Sev Code = ORA_SVC_SEV1).
Total Duration as High Severity SR (Minutes)	The total duration in minutes that SR Severity is High (Sev Code = ORA_SVC_SEV1).
Total Duration as In Progress SR (Days)	The total duration in days that an SR is in any status that belongs to 'In Progress' Status Type..
Total Duration as In Progress SR (Hours)	The total duration in hours that an SR is in any status that belongs to 'In Progress' Status Type..
Total Duration as In Progress SR (Minutes)	The total duration in minutes that an SR is in any status that belongs to 'In Progress' Status Type..
Total Duration as Low Severity SR (Days)	The total duration in days that SR Severity is Low (Sev Code = ORA_SVC_SEV3).
Total Duration as Low Severity SR (Hours)	The total duration in hours that SR Severity is Low (Sev Code = ORA_SVC_SEV3).
Total Duration as Low Severity SR (Minutes)	The total duration in minutes that SR Severity is Low (Sev Code = ORA_SVC_SEV3).
Total Duration as Medium Severity SR (Days)	The total duration in days that SR Severity is Medium (Sev Code = ORA_SVC_SEV2).
Total Duration as Medium Severity SR (Hours)	The total duration in hours that SR Severity is Medium (Sev Code = ORA_SVC_SEV2).
Total Duration as Medium Severity SR (Minutes)	The total duration in minutes that SR Severity is Medium (Sev Code = ORA_SVC_SEV2).
Total Duration as New SR (Days)	The total duration in days that an SR is in any status that belongs to 'New' Status Type..
Total Duration as New SR (Hours)	The total duration in hours that an SR is in any status that belongs to 'New' Status Type..
Total Duration as New SR (Minutes)	The total duration in minutes that an SR is in any status that belongs to 'New' Status Type..
Total Duration as Resolved SR until Reopen (Days)	The total duration in days that an SR is in any status that belongs to 'Resolved' Status type until it was reopened. (applicable only for a reopened SR).
Total Duration as Resolved SR until Reopen (Hours)	The total duration in hours that an SR is in any status that belongs to 'Resolved' Status type until it was reopened. (applicable only for a reopened SR).

Metric	Metric Definition
Total Duration as Resolved SR until Reopen (Minutes)	The total duration in minutes that an SR is in any status that belongs to 'Resolved' Status type until it was reopened. (applicable only for a reopened SR).
Total Duration as Waiting SR (Days)	The total duration in days that an SR is in any status that belongs to 'Waiting' Status Type..
Total Duration as Waiting SR (Hours)	The total duration in hours that an SR is in any status that belongs to 'Waiting' Status Type..
Total Duration as Waiting SR (Minutes)	The total duration in minutes that an SR is in any status that belongs to 'Waiting' Status Type..
Total Duration in SR Queue (Days)	The total duration in days that an SR stays in any specific queue.
Total Duration in SR Queue (Hours)	The total duration in hours that an SR stays in any specific queue.
Total Duration in SR Queue (Minutes)	The total duration in minutes that an SR stays in any specific queue.
Total Duration of SR Lifecycle Change (Days)	The total duration in days that an SR is resident in a specific status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource..
Total Duration of SR Lifecycle Change (Hours)	The total duration in hours that an SR is resident in a specific status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource..
Total Duration of SR Lifecycle Change (Minutes)	The total duration in minutes that an SR is resident in a specific status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource..
Total Duration SR Unassigned to Assignee (Days)	The total duration in days that an SR is not assigned to any resource. (Assignee field is blank).
Total Duration SR Unassigned to Assignee (Hours)	The total duration in hours that an SR is not assigned to any resource. (Assignee field is blank).
Total Duration SR Unassigned to Assignee (Minutes)	The total duration in hours that an SR is not assigned to any resource. (Assignee field is blank).
Total Duration SR Unassigned to Queue (Days)	The total duration in days that an SR is not assigned to any Queue. (Queue field is blank).
Total Duration SR Unassigned to Queue (Hours)	The total duration in hours that an SR is not assigned to any Queue. (Queue field is blank).
Total Duration SR Unassigned to Queue (Minutes)	The total duration in minutes that an SR is not assigned to any Queue. (Queue field is blank).
Total Duration with SR Assignee (Days)	The total duration in days that an SR stays with any specific resource / assignee.
Total Duration with SR Assignee (Hours)	The total duration in hours that an SR stays with any specific resource / assignee.
Total Duration with SR Assignee (Minutes)	The total duration in minutes that an SR stays with any specific resource / assignee.
Average Duration of SR Lifecycle Change (Minutes)	The average duration in minutes that an SR is with a particular status / severity / queue / resource. The metric assumes meaning seen in context of one of status, severity, queue or resource. This metric is calculated as follows: Total Duration of SR Lifecycle Change (Minutes) / # of SRs tracked for Lifecycle changes.



Metric	Metric Definition
Minimum Change Start Date	The Start time of association of an SR with a tracked attribute such as Assignee, Queue, Severity, Status or Status Type.
Maximum Change End Date	The End time of association of an SR with a tracked attribute such as Assignee, Queue, Severity, Status or Status Type.
# of Raw SRs (Lifecycle)	The total number of SRs tracked for Lifecycle changes, including the deleted SRs.

## CX - Service Request Milestone

This table describes the B2B Service Request Milestone metrics.

Metric	Metric Definition
# of Active Milestones	The total SR Active Milestones (does not include the Milestones in Cancelled status)
# of Cancelled Milestones	The total SR Milestones that are in Cancelled status. (Milestone status = Cancelled)
# of Completed Compliant Milestones	The total Milestones that have been Completed and are Compliant (Milestone status = Complete and Compliance Flag = Y)
# of Completed Expired Milestones	The total Milestones that have been completed and Expired (Milestone status = Complete and Compliance Flag = N)
# of Completed Milestones	The total Milestones that have been completed (Milestone status = Complete)
# of Compliant Milestones	The total Compliant Milestones (Milestone Status not equal to Cancelled and Compliance Flag not equal to N)
# of Expired Milestones	The total Expired Milestones (Milestone Status not equal to Cancelled and Compliance Flag = N)
# of Milestones	The total SR Milestones including the Milestones in Cancelled status
# of Overdue Time Milestones	The total non-compliant/Overdue Milestones. (Compliance Flag = N). Canceled Milestones are also included in this metric.
# of Raw SRs (Milestone)	The total number of SRs with Milestones including the deleted SRs.
# of SRs	The total number of SRs with Milestones
% Completed Compliant Milestones	The percentage of Completed Compliant milestones. This metric is calculated as follows: $100 * (\# \text{ of Completed Compliant Milestones} / \# \text{ of Completed Milestones})$
% Completed Expired Milestones	The percentage of Completed Expired Milestones. This metric is calculated as follows: $100 * (\# \text{ of Completed Expired Milestones} / \# \text{ of Completed Milestones})$
% Completed Milestones	The percentage of Completed Milestones. This metric is calculated as follows: $100 * (\# \text{ of Completed Milestones} / \# \text{ of Active Milestones})$
% Compliant Milestones	The percentage of Compliant Milestones. This metric is calculated as follows: $100 * (\# \text{ of Compliant Milestones} / \# \text{ of Active Milestones})$



Metric	Metric Definition
% Expired Milestones	The percentage of Expired Milestones. This metric is calculated as follows: $100 * (\# \text{ of Expired Milestones} / \# \text{ of Active Milestones})$
Average of Overdue Time (Minutes)	The total time elapsed in minutes since the SR Milestone was due averaged over a number of overdue time Milestones. Applies for non-compliant milestones.
Overdue Time (Minutes)	The total time elapsed in minutes since the SR Milestone was due. Applies for non-compliant milestones.
# of First Response Compliant SRs	The total SRs that have the compliant first response milestone i.e. whose First Response milestone has been met.
# of Resolution Compliant SRs	The total Resolved Compliant SRs i.e. whose Resolution milestone has been met.
# of SRs with First response Violations	The total SRs with first-response violations i.e. whose First Response milestone has not been met.
# of SRs with Resolution Violations	The total SRs with Resolution violations i.e. whose Resolution milestone has not been met.
% First Response Compliant SRs	The percentage of the first response SRs that are compliant. This metric is calculated as follows: $100 * (\# \text{ of First Response Compliant SRs} / (\# \text{ of First Response Compliant SRs} + \# \text{ of SRs with First Response Violations}))$
% Resolution Compliant SRs	The percentage of the Resolution SRs that are compliant. This metric is calculated as follows: $100 * (\# \text{ of Resolution Compliant SRs} / (\# \text{ of Resolution Compliant SRs} + \# \text{ of SRs with Resolution Violations}))$
% SRs with First Response Violations	The percentage of the SRs with first-response violations. This metric is calculated as follows: $100 * (\# \text{ of SRs with First response Violations} / (\# \text{ of First Response Compliant SRs} + \# \text{ of SRs with First Response Violations}))$
% SRs with Resolution Violations	The percentage of the SRs with Resolution violations. This metric is calculated as follows: $100 * (\# \text{ of SRs with Resolution Violations} / (\# \text{ of Resolution Compliant SRs} + \# \text{ of SRs with Resolution Violations}))$

## CX - Subscription Bill Line

This table describes the Subscription Bill Line metrics. These metrics are used in the Document Currency (DC) and Analytics Currency (AC) fact folders in this subject area.

Document Currency is the currency used while entering the data in the application. Analytics Currency is the currency defined in Fusion Analytics Warehouse. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Subscription Start Date to convert to the analytics currency. Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
Subscription Bill Amount	The total Subscription Bill Amount
Subscription Invoiced Amount with Tax	The total Subscription Invoiced Amount with Tax
Subscription Invoiced Bill Amount	The total Subscription Invoiced Bill Amount

Metric	Metric Definition
Subscription Invoiced Onetime Charges	The total Subscription Invoiced Onetime Charges
Subscription Invoiced Recurring Charges	The total Subscription Invoiced Recurring Charges
Subscription Invoiced Usage Amount	The total Subscription Invoiced Usage Amount
Subscription Invoiced Usage Quantity	The total Subscription Invoiced Usage Quantity
Subscription Onetime Charges	The total Subscription Onetime Charges
Subscription Recurring Charges	The total Subscription Recurring Charges
Subscription Usage Amount	The total Subscription Usage Amount
Subscription Usage Quantity	The total Subscription Usage Quantity

## CX - Subscription Historical Trend

This table describes the Subscription Historical Trend metrics. These metrics are used in the Document Currency (DC) and Analytics Currency (AC) fact folders in this subject area.

Document Currency is the currency used while entering the data in the application. Analytics Currency is the currency defined in Fusion Analytics Warehouse. Analytics Currency and Exchange Rate Type are configured during product implementation. The Exchange Rate date basis uses the Subscription Start Date to convert to the analytics currency. Metrics in these folders show amounts in their respective currencies.

Metric	Metric Definition
# of Active Customers - Period Start	The total Active customers at the start of a period (Customers with an active subscription in a given period)
# of Active Subscriptions - Period Start	The total number of Active Subscriptions at the start of a period
Active MRR - Period Start	The total monthly recurring revenue of all Active Subscriptions at the start of a period
Average Revenue per Customer - Period Start	The total Average Revenue per Customer (ARPU) at the start of a period. This metric is computed as follows: Total Active MRR/Total number of Active Customers
Product Net Price (TCV) - Period Start	The total Product Net Price of Active Subscriptions at the start of a period
# of Active Customers - Period End	The total Active customers at the end of a period (Customers with an active subscription in a given period)
# of Active Subscriptions - Period End	The total number of Active Subscriptions at the end of a period
Active MRR - Period End	The total Monthly Recurring Revenue of all Active Subscriptions at the end of a period
Average Revenue per Customer - Period End	The total Average Revenue per Customer (ARPU) at the end of a period. This metric is computed as follows: Total Active MRR/Total number of Active Customers
Product Net Price (TCV) - Period End	The total Product Net Price of Active Subscriptions at the end of a period
# of New Active Subscriptions	The number of New Subscriptions started in a period. (Started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions)
# of Renewed Active Subscriptions	The number of Subscriptions Renewed in a period. (Number of active subscriptions that are renewed from existing subscriptions)

Metric	Metric Definition
# of Terminated Subscriptions	The number of Subscriptions Terminated in a period. (Number of active subscriptions that are terminated in a period. This metric doesn't include closed subscriptions due to the amendment or suspension of existing subscriptions)
# of Due for Renewal Subscriptions	The number of Subscriptions that are due for Renewal in a period.
# of Expansion Subscriptions	The total Expansion Subscriptions (Target subscription MRR greater than Source Subscription MRR).
# of Contraction Subscriptions	The total number of Expansion Subscriptions (Target subscription MRR less than Source Subscription MRR).
# of Churned Renewal Subscription	The total Churned Renewal Subscriptions in a period. (Subscriptions that were Renewed from existing Subscriptions but Canceled in the given period)
# of Lapsed Renewal Subscriptions	The total Lapsed Renewal Subscriptions in a period. (Active subscriptions that expired in a period without being renewed).
New Active MRR	The total new MRR of Active subscriptions added in a period. (Started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions)
Activated Renewal MRR	The total Activated Renewal MRR in a period. (Active Subscriptions that were renewed from existing subscriptions)
Termination MRR	The total Termination MRR in a period. (Active subscriptions that are closed in a period, not due to the amendment or suspension of existing subscriptions)
MRR Due for Renewal	The total MRR of Subscriptions that are due for Renewal in a period
Expansion MRR	The total Expansion MRR in a period. (The difference in MRR between a target and source of an amendment relationship where the target MRR > Source MRR and the target start date falls within this period and not in Draft)
Contraction MRR	The total Contraction MRR in a period. (The difference in MRR between a target and source of an amendment relationship where the target MRR < Source MRR and the target start date falls within this period and not in Draft)
Churned Renewal MRR	The total Churned Renewal MRR in a period. (Subscriptions that were Renewed from existing Subscriptions but Canceled in the given period)
Lapsed Renewal MRR	The total Lapsed Renewal MRR in a period. (Active subscriptions that expired in a period without being renewed)
Product Net Price (TCV) - Contraction Subscriptions	The Product Net Price (TCV) due to Contraction in a period (The difference in Product Net Price (TCV) between a target and source of an amendment relationship where the target TCV less than Source TCV and the target start date falls within this period and not in Draft).

Metric	Metric Definition
Product Net Price (TCV) - Expansion Subscriptions	The Product Net Price (TCV) due to Expansion in a period (The difference in Product Net Price (TCV) between a target and source of an amendment relationship where the target TCV greater than Source TCV and the target start date falls within this period and not in Draft).
Product Net Price (TCV) - New Active Subscriptions	The total Product Net Price of the New Subscriptions started in a period (started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions).
Product Net Price (TCV) - Renewed Active Subscriptions	The total Product Net Price of the Renewed Subscriptions in a period (number of active subscriptions that are renewed from existing subscriptions).
Product Net Price (TCV) - Terminated Subscriptions	The total Product Net Price of the Subscriptions Terminated in a period (number of active subscriptions that are terminated in a period). This metric does not include TCV of the closed subscriptions due to the amendment or suspension of existing subscriptions.
Product Net Price (TCV) - Due for Renewal	The total Product Net Price of Subscriptions that are due for Renewal in a period.
Product Net Price (TCV) - Churned Renewal Subscriptions	The total Product Net Price of the Churned Renewal Subscriptions in a period (Subscriptions that were Renewed from existing Subscriptions but Canceled in the given period).
Product Net Price (TCV) - Lapsed Renewal Subscriptions	The total Product Net Price of the Lapsed Renewal Subscriptions in a period (Active subscriptions that expired in a period without being renewed).
Absolute MRR Churn	The Absolute MRR Churn. This metric is calculated as follows: (Lapsed Renewal MRR + Termination MRR + Churned Renewal MRR)
# of New Customers	The number of New Customers added in a period. (Customers who started an active subscription in a given period)
# of Churned Customers	The number of Customers Churned in a period (Customers whose active subscriptions were all terminated or expired without renewal in a given period)
New Customer MRR	The total MRR of a new Customer added in a period (started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions).
Product Net Price (TCV) - New Customers	The total Product Net Price of the New Customers added in a period (Customers who started an active subscription in a given period)
Change in # of Active Customers	The change in the number of Active Customers in a given period. This metric is calculated as follows: # of Active Customers (Period End) - # of Active Customers (Period start)
Change in # of Active Subscriptions	The change in the Number of Subscriptions in a given period. This metric is calculated as follows: Number of active subscriptions (Period End) - Number of active subscriptions (Period Start)
Change in Active MRR	The change in Active MRR in a given period. This metric is calculated as follows: Active MRR (Period End) - Active MRR (Period Start)

Metric	Metric Definition
Change in Average Revenue per Customer	The change in Average Revenue per Customer in a given Period. This metric is calculated as follows: Average Revenue per customer (Period End) - Average Revenue per customer (Period Start)
Change in Product Net Price	The change in the Product Net Price in a given period. This metric is calculated as follows: Product Net Price (Period End) - Product Net Price (Period Start)
Customers Churn Rate %	The Customer Churn Rate. This metric is calculated as follows: # of Churned Customers /# of Active Customers (period start)
MRR Churn Rate %	The MRR Churn Rate. This metric is calculated as follows: 100 * (Lapsed Renewal MRR + Termination MRR + Churned Renewal MRR) / Active MRR (Period Start)
MRR Lapsed Renewal %	The MRR Lapsed Renewal Rate. This metric is calculated as follows: 100*Lapsed Renewal MRR/MRR Due for Renewal
MRR Renewal Rate %	The MRR Renewal Rate. This metric is calculated as follows: 100 * Activated Renewal MRR / MRR due for Renewal (Period End)
Net Revenue Retention Rate %	The Net Revenue Retention Rate. This metric is calculated as follows: 100 * Active MRR (Period End) / Active MRR (Period Start)

## CX - Subscriptions

This table describes the Subscription Metrics.

Metric	Metric Definition
# of Active Subscription Downgrades	The total Downgraded Subscriptions (amend reason = ORA_DOWNGRADE) that are Active
# of Active Subscription Upgrades	The total Upgraded Subscriptions (amend reason = ORA_UPGRADE) that are Active
# of Active Subscriptions	The total Active Subscriptions
# of Active Subscriptions Added - Last 30 days	The total Subscriptions Added in the last 30 days that are Active
# of Active Subscriptions Expiring - Next 30 days	The total Active Subscriptions Expiring in the next 30 days
# of Customers	The total Customers
# of Customers with Active Subscriptions	The total customers with at least one Active Subscription
# of Evergreen Subscriptions	The total Evergreen Subscriptions (no end date)
# of Expansion Active Subscriptions	The total Expansion Subscriptions (Target subscription MRR > Source Subscription MRR) that are Active
# of Expansion Subscriptions	The total Expansion Subscriptions (Target subscription MRR > Source Subscription MRR)
# of Expired Subscriptions	The total Expired Subscriptions
# of New Active Subscriptions	The total new Subscriptions that are Active (started in a period and which aren't a result of an amendment, suspension, or renewal of existing subscriptions)
# of Products	The total Products

<b>Metric</b>	<b>Metric Definition</b>
# of Products with Active Subscriptions	The total Products that have Active Subscriptions
# of Subscription Downgrades	The total Downgraded Subscriptions (amend reason = ORA_DOWNGRADE)
# of Subscription Upgrades	The total Upgraded Subscriptions (amend reason = ORA_UPGRADE)
# of Subscriptions	The total Subscriptions
# of Subscriptions Expired - Last 30 days	The total Subscriptions Expired in the last 30 days
# of Terminated Subscriptions	The total terminated subscriptions
# Renewed Active Subscriptions	The total Renewed Subscriptions that are Active
# Renewed Subscriptions	The total Renewed Subscriptions
Activated Renewal MRR	The total Activated Renewal MRR (Active Subscriptions that were renewed from existing subscriptions)
Active Subscription MRR	The total Monthly Recurring Revenue for Active Subscription
Average Revenue per Customer (ARPU)	The Total Average Revenue per Customer (ARPU). This metric is computed as follows: Total Active MRR/Total number of Active Customers
Contraction Active MRR	The total Contraction MRR for Active Subscription(The difference in MRR between a target and source of an amendment relationship where the target MRR < Source MRR and the target start date falls within this period and not in Draft/Cancelled)
Early Termination Fee	Early Termination Fee
Expansion Active MRR	The total Expansion MRR for Active Subscriptions (The difference in MRR between a target and source of an amendment relationship where the target MRR > Source MRR and the target start date falls within this period and not in Draft/Cancelled)
First Active MRR	The total new MRR of Active subscriptions (which aren't a result of an amendment, suspension, or renewal of existing subscriptions)
Subscription Cancelled Amount	The total Subscription Cancelled Amount
Subscription Closed Amount	The total Subscription Closed Amount
Subscription Credited Amount	The total Subscription Credited Amount
Subscription Invoiced Amount	The total Subscription Invoiced Amount
Subscription MRR	The total Monthly Recurring Revenue
Subscription Total Contract Value (TCV)	The total Subscription Contract Value

# 8

## Prebuilt

### Overview

This chapter provides information on all the prebuilt business metrics, dashboards, and analyses that are shipped as the standard offering along with the product.

### Prebuilt Analyses

Prebuilt Analyses are the functional analysis defined using Oracle Data Visualizer on Oracle Analytics Cloud. Only analytic currency metrics are used in these analyses. These tables show the summary of predefined analyses available for each module.

To access prebuilt data visualizations, go to **Shared Folders**, click **Oracle**, click **Fusion CX**, and then click **Detail Dashboards**.

### Activity Management

Analyses Detail	Analyses Description	Related Subject Areas
New Activities	Shows the number of activities created in the last 7 days, and provides a breakdown by different parameters such as creation date, activity type, and owner.	CX - Activity
Number of Activities	Shows the number of activities performed by sales resources based on activity date, activity status, and activity type.	CX - Activity
Activity Duration for Completed Activities	Shows how long it takes for a sales resource to complete an activity and provides a breakdown based on activity type. Summaries are included to show the metric based on activity owner, number of activities completed, activity type, date, and status.	CX - Activity
Team Member Activities Rate	Provides useful insights into the average number of activities being performed by a team member, and includes a breakdown based on different activity types.	CX - Activity
Lead Activities Rate	Shows the number of activities performed on leads, and provides a breakdown based on leads status and activity date.	CX - Lead Activity

Analyses Detail	Analyses Description	Related Subject Areas
Opportunities Activities Rate	Shows the number of activities performed on opportunities and provides a breakdown by opportunity outcome and status.	CX - Opportunity Activity
Activity Rate - Won Opportunities	Provides insights on the number of activities performed on opportunities that go on to win. This information helps businesses users understand the average number of activities needed to win an opportunity.	CX - Opportunity Activity
Task Rate - Won Opportunities	Provides insights on the number of tasks performed on opportunities that go on to win. This information helps businesses users understand how many tasks and which types of tasks contribute to an opportunity win.	CX - Opportunity Activity

## Lead Management

Analyses Detail	Analyses Description	Related Subject Areas
New Leads	Shows the number of leads created in the last seven days, and provides a break down by different parameters such as creation date, origin, product, and account type.	CX - Leads
Number of Leads	Shows the number of leads by creation date, status, product, account, and other lead-related attributes.	CX - Leads
Average Lead Age	Shows the average lead age by lead status and lead creation period for the current quarter.	CX - Leads
Lead Qualification Rate	Shows qualified leads for the current quarter, and shows a break down of converted leads by different lead attributes such as status, lead creation date, age, and by lead qualification velocity.	CX - Leads
Lead Conversion Rate	Shows lead conversions for the current quarter, and shows a break down of converted leads by different lead attributes such as lead channel and sales account.	CX - Leads
Won Revenue by Lead Channel	Provides insight on which lead channels contribute to the highest won revenue.	CX - Leads
Lead to Opportunity Velocity	Shows insights on how quickly leads are converting to opportunities, and allows comparison of this metric with other velocity metrics such as lead qualification to conversion velocity.	CX - Leads



Analyses Detail	Analyses Description	Related Subject Areas
Accounts - Leads	Lists sales resources or credit recovers with the highest number of wins and deal sizes.	CX - Leads
Lead Conversion Overview	Shows the summary of lead conversion and how it trends over time.	CX - Leads

## Marketing Campaigns

Analyses Detail	Analyses Description	Related Subject Areas
Campaign Activity Overview	Shows the Campaign Activity Summary and details of some of the key activities like Email, Form, Web, Landing Page, and External.	CX - Campaign Activity Analysis

## Opportunity Management

Analyses Detail	Analyses Description	Related Subject Areas
Sales Pipeline - Pipeline Shape	Provides a visual breakdown of open opportunity pipeline revenue by different sales stages and trend of the open opportunity pipeline revenue from last six enterprise periods.	CX - Opportunity Revenue Line Snapshot
Sales Pipeline - Pipeline Review	Provides a visual summary of open opportunities and their revenue numbers by close date and sales stage.	CX - Opportunity Revenue Line
Sales Pipeline - Pipeline Trend YoY	Shows historical trends of open opportunity revenue based on historical snapshots.	CX - Opportunity Revenue Line Snapshot
Sales Pipeline Velocity	Shows the sales pipeline velocity for different quarters and the number of days spent in stage by opportunities, broken down by opportunity status and opportunity owner.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Stage Progression
Sales Stage Progression	Shows the movement of opportunities through the sales stages in terms of total amounts and percentages.	CX - Opportunity Stage Progression
Sales Cycle Analysis	Provides insights into bottle necks in the sales cycle, and in which stages opportunities are spending the most amount of time.	CX - Opportunity Stage Progression
Stalled Opportunities	Provides a list of stalled opportunities in the system broken down by sales stage. Only those opportunities with a more than 50% win probability are considered in the visualization.	CX - Opportunity Stage Progression

Analyses Detail	Analyses Description	Related Subject Areas
Sales Stage Velocity	Provides insights into how quickly opportunities are moving through the sales funnel, as well as insights relative to their outcomes (won or lost).	CX - Opportunity Stage Progression
Sales Funnel Leakage	Shows the sales stage from which opportunities are moving to closed from lost and how they compare to those that are moving from closed to won.	CX - Opportunity Revenue Line
Top Deals At Risk	Provides an overview of top opportunities (in terms of revenue and win probability > 50%) that are at risk of not closing.	CX - Opportunity Revenue Line
Weighted Pipeline - Detail	Compares the open pipeline with the weighted pipeline by sales stage and closing quarter.	CX - Opportunity Revenue Line
Weighted Pipeline - Trend	Shows trends of the weighted pipeline based on the snapshot period, and also a projection over the next 3 months.	CX - Opportunity Revenue Line
Won Sales	Shows key metrics related to won sales such as won opportunity line revenue and number of won opportunity revenue lines, win rate, and conversion rate. It also shows how won opportunities compares to open and lost opportunities during the same time period.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Revenue Line
Win - Loss Analysis	Shows won and lost revenue by different quarters and a historical trend over the last 6 quarters. It also shows the won revenue by top 10 territories and products.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Revenue Line
Lost Sales	Shows lost opportunity revenue lines by amount and by lost quarter. It also includes key conversion metrics such as revenue line loss rate percentage.	CX - Opportunity Revenue Line Snapshot, CX - Opportunity Revenue Line
Average Deal Size	Provides a breakdown of average deal size by sales stage, opportunity owner, territory owner, and product/group.	CX - Opportunity Revenue Line
Average Deal Size - Trend Analysis	Shows the trend of average deal size by territory and by product, and how the metric has evolved historically.	CX - Opportunity Revenue Line Snapshot
Win Rate and Conversion Rate Analysis	Shows the revenue line win rate and conversion rate percentages and sales stage.	CX - Opportunity Revenue Line
Win Rate and Conversion Rate Trend	Shows the historical trend of revenue line win rate and conversion rate by sales stage.	CX - Opportunity Revenue Line Snapshot

Analyses Detail	Analyses Description	Related Subject Areas
Top 20 Accounts	Shows the top 20 accounts based on open and won revenue. It also provides a breakdown of won revenue by account and product, as well as account and territory.	CX - Opportunity Revenue Line
Team All - Stars	Lists sales resources or credit recoveries with the highest number of wins and deal sizes.	CX - Opportunity Revenue Line
Converted Opportunity Pipeline	Shows a summary of the converted opportunities (converted from leads) such as converted opportunity line revenue, average won line revenue, and converted revenue over time.	CX - Opportunity Revenue Line
Opportunity Days to Close	Shows how long it takes to close opportunities, and compares them with the converted opportunities closure time and rates.	CX - Opportunity
Converted Opportunity Revenue	Shows the pipeline contributed by converted opportunities.	CX - Opportunity
Opportunity Stage Progression	Shows the details on the stages that Opportunities have progressed through.	CX-Opportunity Stage Progression
Renewal Sales Dashboard	Shows the summary of opportunities created as part of the renewal selling.	CX - Opportunity Revenue Line

## Quote and Order Capture

Analyses Detail	Analyses Description	Related Subject Areas
Opportunity Quotes	Shows the summary of the opportunity quotes raised, statuses by their owners, quotes raised over time period, etc.	CX - Opportunity Quote
Quote Cycle Time	Provides insight into the time it takes when an opportunity moves to quote, quote to order placed, and contract start time.	CX - Opportunity Quote
Quote Contract Value	Shows a summary of the quote contract value and details such as contract value by owner, by opportunity name, etc.	CX - Opportunity Quote
Quote Revenue	Shows the summary of the quote revenue and how it's split into recurring, non-recurring, usage based revenue, and related details.	CX - Opportunity Quote
Opportunity Quote Lines	Shows the summary of opportunity quote lines, the contract value, and the discount offered.	CX - Opportunity Quote Line
Opportunity Quotes - Trends	Shows the trend of quote generation, won quote line, discount percentage, and the cycle time.	CX - Opportunity Quote

## Service Request Management

### Prebuilt Analyses

Analyses Detail	Analyses Description	Related Subject Areas
SR Overview	Shows a summary of service requests such as total SRs, critical SRs, SRs pending agent action, SRs by time, etc.	CX - Service Request
Critical SRs	Shows the summary information for critical SRs such as critical SRs in various statuses, by assignee and customers, etc.	CX - Service Request
Critical SR Details	Provides details of critical SRs by sales account and related details.	CX - Service Request
Agent Performance Details	Provides insights into how the service agents performance is, such as the resolved SRs, average time to resolve, etc.	CX - Service Request
SR Resolution	Shows a summary of resolved SRs, the time it took to resolve them by month and by severity, etc.	CX - Service Request
SRs by Channel	Shows a summary of SRs by different channels that were used for the SRs.	CX - Service Request
SRs by Service Category	Shows a summary of SRs by service category for which the SRs were raised.	CX - Service Request

## Subscription Management

Analyses Detail	Analyses Description	Related Subject Areas
Subscription Overview	Shows the summary of the existing Subscription metrics (Active MRR, Active Customers, ARPU, Active TCV etc.) and shows Renewals, Upgrades, Downgrades over a period of time.	CX - Subscriptions
Subscription Trends	Shows the trend of Active MRR, Active Customer, Active TCV, ARPU, Churn Rate, Renewal Rate, etc. over a period of time.	CX - Subscription Historical Trend
Subscription AR Overview	Summarizes the Subscription AR transactions, and shows the overdue invoices and the credit memos raised for Subscription invoices.	Financials - AR Revenue* * This report is enabled for customers using CX+ERP sku

## Marketing Campaigns

Analyses Detail	Analyses Description	Related Subject Areas
Campaign Attributed Leads	Shows the number of leads generated from each campaign that was created in the current quarter.	CX - Campaign Members
Campaign Attributed Opportunities	Shows the number of opportunities generated from each campaign that was created in the current quarter. This analysis uses the last touch attribution model.	CX - Campaign Opportunity Revenue
Campaign Attributed Pipeline	Shows the pipeline contribution from the opportunities attributable to the campaign.	CX - Campaign Opportunity Revenue
Campaign ROI	Shows the ROI from each campaign and the attributable won revenue.	CX - Campaign Opportunity Revenue
Cost Per Opportunity Revenue Line	Provides insight on the average campaign cost incurred on generating a single opportunity revenue line. It also provides a comparison based on different campaigns.	CX - Campaign Opportunity Revenue
Cost Per Won Revenue	Shows the average campaign cost for every earning. It also provides a comparison of this metric with different campaigns and products.	CX - Campaign Opportunity Revenue
Top Campaigns	Shows the best performing campaigns based on different parameters such as ROI, number of wins, revenue generated, etc.	CX - Campaign Opportunity Revenue
Campaign Targeted Accounts	Shows which accounts were targeted by different campaigns and the result based on ROI, opportunity outcome, and revenue generated.	CX - Campaign Opportunity Revenue

## Prebuilt Business Metrics

### Overview

These are measurements that define and track specific business goals and objectives that often roll up into larger organizational strategies that require monitoring, improvement, and evaluation.

Predefined business metrics allow a user to view business performance and drill into the details to understand why a value may be off the target. Only Analytic Currency metrics are used in the predefined content.



#### Note:

Key metrics have replaced key performance indicators (KPIs) in release 24R1.

## Activity Management

Business Metric Name	Business Metric Description	Related Subject Areas
Number of Activities	Shows the number of activities.	CX - Activity
New Activities	Shows activities created in the last seven days.	CX - Activity
Activity Rate - Won Opportunities	Shows the average number of activities for won opportunities.	CX - Opportunity Activity
Task Rate - Won Opportunities	Shows the average number of tasks created for won opportunities.	CX - Opportunity Activity
Appointment Rate - Won Opportunities	Shows the average number of appointments created for won opportunities.	CX - Opportunity Activity
Meeting Rate for Won Opportunities	Shows the average number of meetings for won opportunities	CX - Opportunity Activity
Demo Rate Won Opportunities	Shows the average number of demos for won opportunities.	CX - Opportunity Activity
Average Number of Activities Per Team Member For Won Opportunities	Shows the average number of activities per team member for won opportunities.	CX - Opportunity Activity
Average Number of Activities Per Team Member For Lost Opportunities	Shows the average number of activities per team member for lost opportunities.	CX - Opportunity Activity
Activity Rate for Open Opportunities	Shows the average number of activities for currently open opportunities.	CX - Opportunity Activity
Number of Customer-facing Tasks for Won Opportunities	Shows the number of tasks by type (call, chat, demo, meeting, or email) for won opportunities.	CX - Opportunity Activity
Number of Customer facing tasks for Lost Opportunities	Shows the number of tasks by type (call, chat, demo, meeting, or email) for lost opportunities.	CX - Opportunity Activity
Activity Duration For Completed Activities	Shows the average activity duration for completed activities.	CX - Activity
Opportunity Activities Rate	Shows the average number of complete activities per opportunity.	CX - Opportunity Activity
Lead Activities Rate	Shows the average number of completed activities per lead.	CX - Lead Activity
Team Member Activity Rate	Shows the average number of activities per team member.	CX - Activity

## Lead Management

Business Metric Name	Business Metric Description	Related Subject Areas
Number of Leads	Shows the number of leads created in the reporting period.	CX - Leads
Lead Qualification Rate (%)	Shows the number of leads qualified, expressed as a percentage of the total number of leads created.	CX - Leads

Business Metric Name	Business Metric Description	Related Subject Areas
Lead Conversion Rate (%)	Shows the number of leads converted, expressed as a percentage of the total number of leads created.	CX - Leads
Lead Rejection Rate (%)	Shows the number of leads rejected, expressed as a percentage of the total number of leads created.	CX - Leads
Average Lead Age	Shows the average number of days the lead is open before it's converted, rejected or retired.	CX - Leads
Lead Qualification to Conversion Velocity	Shows the average number of days before the qualified lead is converted.	CX - Leads
Number of Qualified Expired Leads	Shows the number of qualified expired leads.	CX - Leads
Won Revenue By Lead Channel	Shows the won opportunity revenue generated from leads based on their lead channel.	CX - Leads
Accounts - Leads	Shows the accounts with the highest number of open leads.	CX - Leads
Opportunity Pipeline Split - Sales vs Marketing	Shows the number of open opportunities by sales stage for opportunities generated from sales vs marketing.	CX - Leads
New Leads	Shows new leads created based on the lead creation date.	CX - Leads
Lead to Opportunity Velocity	Shows the average number of days a lead has taken from the day the lead is created to the day its converted.	CX - Leads

## Marketing Campaigns

Business Metric Name	Business Metric Description	Related Subject Areas
Campaign Attributed Leads	Shows the number of leads generated from marketing campaigns.	CX - Campaign Members
Campaign Attributed Opportunities	Shows the number of opportunities generated from marketing campaigns (using the last touch model).	CX - Campaign Opportunity Revenue
Campaign Attributed Pipeline	Shows pipeline revenue contributions from campaign-attributable opportunities (using the last touch model).	CX - Campaign Opportunity Revenue
Campaign Attributed Won Revenue	Shows the total revenue attributed to a campaign for all opportunities with a closed-won status.	CX - Campaign Opportunity Revenue
Campaign ROI	Shows a campaign return on investment based on campaign actual cost and campaign attributable revenue.	CX - Campaign Opportunity Revenue

Business Metric Name	Business Metric Description	Related Subject Areas
Campaign Responses	Shows the number of responses for each campaign.	CX - Campaign Opportunity Revenue
Campaign Actual Vs Budgeted Cost	Shows the ratio of actual cost / budgeted cost for every campaign.	CX - Campaign Opportunity Revenue
Campaign Attributed Won Opportunity Revenue Lines	Shows the number of won opportunity revenue lines from opportunities attributable to a campaign.	CX - Campaign Opportunity Revenue
Campaign Attributed Lost Opportunity Revenue Lines	Shows the number of lost opportunity revenue lines from opportunities attributable to a campaign.	CX - Campaign Opportunity Revenue
Campaign Attributed Open Opportunity Revenue Lines	Shows the number of open opportunity revenue lines from opportunities attributable to a campaign.	CX - Campaign Opportunity Revenue
Cost Per Opportunity Revenue Line	Shows the ratio of campaign actual cost and the number of opportunity revenue lines.	CX - Campaign Opportunity Revenue
Cost Per Won Opportunity Revenue Line	Shows the ratio of campaign actual cost and the number of won opportunity revenue lines.	CX - Campaign Opportunity Revenue
Cost Per Won Revenue	Shows the ratio of campaign actual cost and won opportunity line revenue.	CX - Campaign Opportunity Revenue
Cost Per Attributed Revenue	Shows the ratio of campaign actual cost and total attributable opportunity line revenue.	CX - Campaign Opportunity Revenue
Top Campaigns	Shows the top campaigns with the highest won revenue.	CX - Campaign Opportunity Revenue
Campaign Engaged Contacts	Shows the number of contacts targeted by campaigns.	CX - Campaign Opportunity Revenue
Campaign Targeted Accounts	Shows the number of accounts targeted by campaigns.	CX - Campaign Opportunity Revenue

## Opportunity Management

Business Metric Name	Business Metric Description	Related Subject Areas
Won Sales	Describes the total sales revenue for the period where opportunity status category = won.	CX - Opportunity Revenue Line
Lost Sales	Describes the total sales revenue for the period where opportunity status category = lost.	CX - Opportunity Revenue Line
Sales Pipeline	Describes the total revenue of opportunity revenue lines with an open status category.	CX - Opportunity Revenue Line
Weighted Pipeline	Describes the weighted pipeline measures sales revenue based on the opportunity win probability percentages assigned to the open opportunities in the current pipeline.	CX - Opportunity Revenue Line



<b>Business Metric Name</b>	<b>Business Metric Description</b>	<b>Related Subject Areas</b>
Sales Pipeline Velocity	Shows how quickly deals move through the pipeline and generate revenue.	CX - Opportunity Stage Progression
Sales Stage Velocity	Shows the average time spent in a stage before opportunities move to closed - won or closed - lost.	CX - Opportunity Stage Progression
Sales Funnel Leakage	Also known as stage drop off rates, the sales funnel leakage tells you where prospects drop out of your funnel at the greatest rates.	CX - Opportunity Revenue Line
Sales Stage Progression	Shows how quickly opportunities are moving through the sales stages.	CX - Opportunity Stage Progression
Average Deal Size	Describes the closed opportunity line revenue averaged over the number of revenue lines.	CX - Opportunity Revenue Line
Win Rate %	Describes the rate in which opportunity revenue lines are being closed - won.	CX - Opportunity Revenue Line
Deals At Risk	Describes the top 'N' open opportunities (by revenue) with a win probability of <= 50%.	CX - Opportunity Revenue Line
Revenue From Accounts	Lists the top accounts by won revenue for the reporting period.	CX - Opportunity Revenue Line
Team All-Stars	Displays details of primary resources with the top 10 wins by revenue for the time period.	CX - Opportunity Revenue Line
Opportunity Line Type	Shows opportunity revenue lines by type.	CX - Opportunity Revenue Line
Revenue Type	Shows renewal revenue by type (recurring, non-recurring, or usage).	CX - Opportunity Revenue Line
Renewal Pipeline	Shows all of the open renewal opportunities.	CX - Opportunity Revenue Line
Renewal Revenue	Shows the renewal pipeline amount.	CX - Opportunity Revenue Line
Renewal Pipeline %	Shows the renewal pipeline revenue of the total opportunity revenue.	CX - Opportunity Revenue Line
Won Renewal Revenue	Shows the won renewal pipeline revenue.	CX - Opportunity Revenue Line
Renewal Opportunities Win Rate	Shows the rate of winning renewal opportunities.	CX - Opportunity Revenue Line
Lost Renewal Revenue	Shows the renewal pipeline revenue that is lost.	CX - Opportunity Revenue Line
Lead Conversion	Shows the number of won and lost opportunities from converted leads.	CX - Opportunity
Opportunities from Leads (%)	Shows the percentage of opportunities of the total number of converted leads.	CX - Opportunity
Average Converted Opportunity Line Revenue	Shows the average opportunity line revenue of the opportunities converted from leads.	CX - Opportunity Revenue Line
Line Revenue from Converted Leads	Shows the open opportunities line revenue from converted leads.	CX - Opportunity Revenue Line

Business Metric Name	Business Metric Description	Related Subject Areas
Lead Generated Pipeline	Shows the number of open opportunities by sales stage for opportunities generated from leads vs from non-leads.	CX - Opportunity
Days to Close Converted Leads	Shows the average of (opportunity close date - opportunity creation date) for opportunities converted from leads.	CX - Opportunity

## Subscription Management

Business Metric Name	Business Metric Description	Related Subject Areas
Monthly Recurring Revenue (MRR)	Shows the total MRR for subscription lines	CX - Subscription Historical Trend
Product Net price (TCV)	Shows the total Subscription Net Amount	CX - Subscription Historical Trend
Active Customers	Shows the total number of customers with an active subscription at the start or end of a given period	CX - Subscription Historical Trend
Average Revenue per User (ARPU)	Shows the total MRR divided by the total number of active customers at the start or end of a given period	CX - Subscription Historical Trend
Churned Customers	Shows the total number of customers churned in a given period	CX - Subscription Historical Trend
MRR Churn Rate	Shows the rate at which MRR is lost from churned subscriptions.	CX - Subscription Historical Trend
Customer Churn Rate	Shows the proportion of active customers that became inactive during the given period. A customer is active if they have a currently active subscription	CX - Subscription Historical Trend
MRR Renewal Rate	Shows the rate of MRR renewal calculated as activated renewal MRR divided by the MRR due for renewal in a given period.	CX - Subscription Historical Trend

## Quote and Order Capture

Business Metric Name	Business Metric Description	Related Subject Areas
Active Quotes	Shows the number of active quotes created.	CX - Opportunity Quote
Average Quotes for Won Opportunities	Shows the average number of quotes for won opportunities.	CX - Opportunity Quote
Quote Cycle Time	Shows the total elapsed time from quote-to-order.	CX - Opportunity Quote
Quote Conversion Rate	Shows the number of closed quotes as a percentage of active quotes.	CX - Opportunity Quote
Average Contract Value	Shows the average contract value.	CX - Opportunity Quote

Business Metric Name	Business Metric Description	Related Subject Areas
Opportunity to Quote Velocity	Shows the opportunity to quote cycle time.	CX - Opportunity Quote
Average Recurring Revenue	Shows the average recurring revenue.	CX - Opportunity Quote
Active Quote Win Rate	Shows the number of won quotes as a percentage of closed quotes.	CX - Opportunity Quote
Number of Quotes Lines	Shows the number of quote lines created.	CX - Opportunity Quote Line
Number of Active Quotes with Lines	Shows the number of active quotes with quote lines.	CX - Opportunity Quote Line
Contract Line Value	Shows the total contract line value for active quotes.	CX - Opportunity Quote Line
Average Contract Line Value	Shows the average contract quote line value.	CX - Opportunity Quote Line
Quote Line Conversion Rate	Shows the number of quote lines converted.	CX - Opportunity Quote Line
Average Quote Line Cycle Time	Shows the average elapsed time from quote line to order.	CX - Opportunity Quote Line
Number of Quoted Opportunities	Shows the number of quoted opportunities.	CX - Opportunity

## Service Request Management

Business Metric Name	Business Metric Description	Related Subject Areas
Service Requests by Status	Shows the number of CX service requests by their status.	CX - Service Request
SR Backlog Rate (%)	Shows the percentage of open SRs relative to the total SRs by age category.	CX - Service Request
Escalation (Critical SR's)	Shows the number of SRs that are marked critical.	CX - Service Request
SR Resolution (%)	Shows the number of SRs in resolved status.	CX - Service Request
Agent Performance	Shows the average time (days) to resolve issues by service agents.	CX - Service Request
SRs by Service Category	Shows the number of open SRs by service category.	CX - Service Request
SRs by Channel	Shows the number of open SRs by channel.	CX - Service Request
Top 10 Customers (With Active SRs)	Shows the top 10 customers with the most active open SRs.	CX - Service Request

## Prebuilt Dashboards

### Overview

A dashboard is a top-level object containing multiple business metrics.

Each dashboard typically contains as many as 8 composite visualizations. These present an aggregated value for the business metric, a supplemental visualization and with a drill down capability to Data Visualization content.

To access prebuilt data visualizations, go to **Shared Folders**, click **Oracle**, click **Fusion CX**, and then click **Overview Dashboards**. All prebuilt decks are migrated to workbooks in Oracle Analytics Cloud, and you can find these in the **Overview Dashboards** folder, located within the parent application folder.



#### Note:

Workbooks have replaced decks and visualizations have replaced cards in release 24R1.

## Prebuilt Dashboards

Workbook Name	Workbook Description
Sales Pipeline	Includes Business Metrics for measuring the overall health of the sales pipeline.
Win-Loss Analysis	Includes Business Metrics that provide insights and metrics on opportunity outcomes (won and lost) and the related opportunity revenue figures.
Sales Activity	Includes Business Metrics that provides insights on sales activities performed in the current quarter and how they relate to opportunity outcomes (won and lost).
Leads	Provides Business Metrics for tracking important lead metrics including those related to lead conversions and lead qualifications.
Campaign Effectiveness	Includes Business Metrics that help marketing and sales users measure campaign ROI metrics, and important conversion metrics as part of the campaign to opportunity process flow.
Opportunity Quotes	Includes Business Metrics that help sales users gain insight into the quotes created in the system, and the contract value and cycle times associated with those quotes.
SR Management	Includes Business Metrics to help service managers and reps to get an overview of the SRs raised in the system, and what's the rate, escalations, and how they're being handled by the agents.
Lead Conversion	Includes Business Metrics that provide insight into the leads that are getting converted to opportunities, the rate of conversion, their contribution to overall opportunities, and their performance in terms of revenue closure and time to close the opportunities.
Renewal Sales	Includes Business Metrics that provide insights and metrics on the renewal opportunity pipeline, the related revenue figures, and their won rate.
Subscriptions	Includes Business Metrics that provide insight and metrics on Subscription MRR and TCV, along with additional details about Customers and their Churn.

# A

## Report Authoring Tips

This section provides tips and guidelines for creating effective and timely reports.

### Topics

- [Common Report Authoring Tips](#)
- [Report Authoring Tips for Oracle Fusion CX Analytics](#)

## Common Report Authoring Tips

Improve all of your Oracle Fusion Analytics Warehouse reports with these recommendations and answers to frequently asked questions regarding reporting. The information isn't exhaustive and is updated regularly with additional information and authoring tips.

### Tips for Filters

When applying filters to reports, follow these guidelines:

- Use dashboard filters instead of workbook or canvas filters for user interactions in analyses.
- Use workbook filters for hidden and non-interaction filters.
- Set the Limit by Values to **None** for all filters in custom workbooks or dashboards to improve performance of prompts.

### Tips for Brushing

Disable brushing to improve report performance. See [Update Canvas Properties](#).

### Tips for Working with Currency

To display the currency format for currency amounts, set the number format in each visualization as a custom currency. Then in the subject area folder, select the currency column. See [Set Currency Symbols for Visualizations](#).

### Tips for Reporting on Attributes Across Multiple Dimensions

When reporting on attributes against multiple dimensions, always use a measure in the report. In subject areas with more than one fact, the measure sets the correct context in the query, builds an accurate navigational path, and returns the expected results. If you don't want the measure to show in the report, hide it. See [Hide or Delete a Column](#).

### Tips for Presentation Hierarchies

To improve performance, use presentation columns instead of presentation hierarchies. See [Work with Presentation Tables and Columns](#).

# Report Authoring Tips for Oracle Fusion CX Analytics

Improve your Oracle Fusion CX Analytics reports with these recommendations and answers to frequently asked questions regarding reporting. The information isn't exhaustive and is updated regularly with additional information and authoring tips.

## Tips on Reporting on Historical Snapshot Subject Areas

Oracle Fusion CX Analytics provides two subject areas on historical snapshot data, namely CX - Opportunity Snapshot and CX - Opportunity Revenue Line Snapshot. When reporting by snapshot data, always include snapshot date as part of the grain of the report. Follow these guidelines:

- When filtering by snapshot date, clearly filter or anchor reports to one or multiple snapshots of your choice.
- Show data by snapshot date to prevent the amounts from different snapshots being aggregated together which results in double-counting.
- Apply additional filters such as expected close date to improve functionality.

### Example

For the pipeline of a quarter, such as 2021Q3, create a report that shows the historical open revenue amount by snapshots periods, such as 07-21 and 08-21.

- The report has a dashboard filter Revenue Line Snapshot Enterprise Period that anchors to two snapshots of 07-21 and 80-21 of the user's choice.
- The report shows the Revenue Line Snapshot Enterprise Period in the table so that amounts from each snapshot appear separately.
- The dashboard filter Opportunity Expected Close Enterprise Quarter generates the intended opportunity data.

## Recommended Filters

Subject Area	Presentation Table (Recommended Filter)
CX - Activity	Filter by at least one of the dates below. <ul style="list-style-type: none"> <li>• Activity Actual Start Date</li> <li>• Activity Created Date</li> <li>• Activity Actual End Date</li> </ul>
CX - Campaign Activity Analysis	To build a meaningful report on Campaign, need to filter by one or more campaigns. <ul style="list-style-type: none"> <li>• Campaign</li> </ul>
CX - Campaign Activity Detail Analysis	To build a meaningful report on Campaign, need to filter by one or more campaigns. <ul style="list-style-type: none"> <li>• Campaign</li> </ul>
CX - Campaign Members	To build a meaningful report on Campaign, need to filter by one or more campaigns. <ul style="list-style-type: none"> <li>• Campaign</li> </ul>
CX - Campaign Opportunity Revenue	To build a meaningful report on Campaign, need to filter by one or more campaigns. <ul style="list-style-type: none"> <li>• Campaign</li> </ul>

CX - Lead Activity	Filter by at least one of the dates below. <ul style="list-style-type: none"><li>• Activity Actual Start Date</li><li>• Activity Created Date</li><li>• Activity Actual End Date</li><li>• Lead Created Date</li><li>• Lead Qualified Date</li><li>• Lead Converted Date</li><li>• Lead Qualified Date</li></ul>
CX - Leads	Filter by at least one of the dates below <ul style="list-style-type: none"><li>• Lead Created Date</li><li>• Lead Qualified Date</li><li>• Lead Converted Date</li><li>• Lead Qualified Date</li></ul>
CX - Opportunity	Filter by at least one of the dates below <ul style="list-style-type: none"><li>• Opportunity Expected Close Date</li><li>• Opportunity Actual Close Date</li><li>• Opportunity Created Date</li></ul>
CX - Opportunity Activity	Filter by at least one of the dates below. <ul style="list-style-type: none"><li>• Activity Actual Start Date</li><li>• Activity Created Date</li><li>• Activity Actual End Date</li><li>• Opportunity Expected Close Date</li><li>• Opportunity Actual Close Date</li><li>• Opportunity Created Date</li></ul>
CX - Opportunity Quote	Filter by at least one of the dates below <ul style="list-style-type: none"><li>• Opportunity Expected Close Date</li><li>• Opportunity Actual Close Date</li><li>• Quote Creation Date</li><li>• Quote Contract Start Date</li><li>• Quote Contract End Date</li><li>• Quote Expiration Date</li></ul>
CX - Opportunity Quote Line	Filter by at least one of the dates below <ul style="list-style-type: none"><li>• Quote Line Creation Date</li><li>• Quote Line Contract Start Date</li><li>• Quote Line Contract End Date</li><li>• Quote Creation Date</li></ul>
CX - Opportunity Revenue Line	Filter by at least one of the dates below <ul style="list-style-type: none"><li>• Opportunity Revenue Line Created Date</li><li>• Opportunity Revenue Line Expected Close Date</li><li>• Opportunity Revenue Line Actual Close Date</li><li>• Opportunity Created Date</li><li>• Opportunity Expected Close Date</li><li>• Opportunity Actual Close Date</li></ul>

CX - Opportunity Revenue Line Snapshot	<p>Reference how to build report using historical snapshot above.</p> <ul style="list-style-type: none"> <li>• Opportunity Revenue Line Snapshot Date</li> <li>• Opportunity Revenue Line Expected Close Date</li> <li>• Opportunity Revenue Line Actual Close Date</li> </ul>
CX - Opportunity Snapshot	<p>Reference how to build report using historical snapshot above.</p> <ul style="list-style-type: none"> <li>• Opportunity Snapshot Date <ul style="list-style-type: none"> <li>– Opportunity Expected Close Date</li> <li>– Opportunity Actual Close Date</li> <li>* Opportunity Created Date</li> </ul> </li> </ul>
CX - Opportunity Stage Progression	<p>Filter by at least one of the dates below.</p> <ul style="list-style-type: none"> <li>• Opportunity Expected Close Date</li> <li>• Stage Enter Date</li> <li>• Stage Exit Date</li> </ul>
CX - Service Request	<p>Filter by at least one of the dates below.</p> <ul style="list-style-type: none"> <li>• Service Request Open Date</li> <li>• Service Request Resolution Date</li> <li>• Service Request Close Date</li> </ul>
CX - Service Request Lifecycle	<p>Filter by at least one of the dates below.</p> <ul style="list-style-type: none"> <li>• Service Request Open Date</li> <li>• Service Request Resolution Date</li> <li>• Service Request Close Date</li> </ul>
CX - Service Request Milestone	<p>Filter by at least one of the dates below.</p> <ul style="list-style-type: none"> <li>• Service Request Open Date</li> <li>• Service Request Resolution Date</li> <li>• Service Request Close Date</li> <li>• Service Request Milestone Due Date</li> <li>• Service Request Milestone Completion Date</li> </ul>
CX - Subscriptions	<p>Filter by at least one of the dimensions below.</p> <ul style="list-style-type: none"> <li>• Sold-to Customer</li> <li>• Subscription Product Type</li> <li>• Inventory Item</li> <li>• Business Unit</li> <li>• Subscription Start Date</li> </ul>
CX – Subscription Bill Line	<p>Filter by at least one of the dimensions below.</p> <ul style="list-style-type: none"> <li>• Sold-to Customer</li> <li>• Subscription Product Type</li> <li>• Inventory Item</li> <li>• Business Unit</li> <li>• Subscription Bill Line Invoice Date</li> <li>• Subscription Bill Line Interface Date</li> </ul>
CX – Subscription Historical Trend	<p>Filter by at least one of the dimensions below.</p> <ul style="list-style-type: none"> <li>• Sold-to Customer</li> <li>• Subscription Product Type</li> <li>• Inventory Item</li> <li>• Business Unit</li> <li>• Subscription Aggregate Date</li> </ul>

---



# B

## Frequently Asked Questions

The Oracle Fusion CX Analytics Frequently Asked Questions (FAQs) provide answers to the most commonly asked questions about provide solutions to improve your analytics experience.

### Topics:

- [How do I synchronize data security from Oracle Fusion Cloud Applications \(Cloud CX\) with Fusion Analytics Warehouse?](#)
- [Why do I not see data for a few metrics such as Facts - Conversion or Facts - Renewal?](#)
- [Which functional area do I need to enable to see data in all the visualizations?](#)
- [Why do I not see the data for Resource Hierarchy, that is all the owner-related dimensions \(Opportunity Owner, Activity Owner, Lead Owner, etc.\)?](#)
- [Why do the count of Eloqua activities show minor differences from what I see in Eloqua Insight?](#)

### How do I synchronize data security from Oracle Fusion Cloud Applications (Cloud CX) with Fusion Analytics Warehouse?

To synchronize data security, you must create a pipeline for the "Security Configuration Option" functional area in the "Customer Experience Security Configurations" offering. This pipeline enables Fusion Analytics Warehouse to extract the access group-based security details from Oracle Fusion Cloud Applications (Cloud CX) and load it into Fusion Analytics Warehouse. Based on the access group-based security setup in Oracle Fusion Cloud Applications (Cloud CX), the synchronization process brings the access group-based rules and assigns to the appropriate users based on the data role assignment to the users in Fusion Analytics Warehouse.

This pipeline brings data from these Oracle Fusion Cloud Applications (Cloud CX) objects and populates these tables in Fusion Analytics Warehouse:

Oracle Fusion Cloud Applications Object	Corresponding Fusion Analytics Warehouse Table
Account Access	DW_CXS_SALES_ACCOUNT_ACCESS_D
Opportunity Access	DW_CXS_OPPORTUNITY_ACCESS_D
Lead Access	DW_CXS_LEAD_ACCESS_D
Access Group Members	DW_CXS_ACCESS_GROUP_MEMBERS_D
Object Share	DW_CXS_OBJECT_SHARE_D
Access Group	DW_CXS_ACCESS_GROUP_RF_DN_DH

To ensure that synchronization happens frequently, you must schedule the incremental refreshes. See [Set Up the Pipeline Parameters](#).

1. Sign in to your service.
2. In Fusion Analytics Warehouse, click the Navigator.

3. In the **Navigator** menu, click **Console**.
4. On the Console, click **Data Configuration** under **Application Administration**.
5. On the Data Configuration page, click **Customer Experience**.
6. On the service page, click **Create**, select **Customer Experience Security Configurations** in **Offering**, select **Security Configuration Option** in **Functional Area**, and then click **Next**.

Customer Experience

Cancel 1 2 3 4 Next >

Select your application areas to transfer data to the warehouse.

Offering Customer Experience Security Configurations

Functional Area Security Configuration Option

7. Review the parameters and click one of the options:
  - **Cancel**: To cancel the data pipeline for the functional area.
  - **Save**: To save the data pipeline for the functional area but not activate it.
  - **Activate**: To schedule when to run the data pipeline for the functional area. See [Activate a Data Pipeline for a Functional Area](#).
8. To ensure access group based security works properly, perform these steps:
  - Create a pipeline for the Security Configuration Option functional area and perform a data load.
  - Ensure users mapped to groups in Oracle Fusion Cloud Applications (Cloud CX) are mapped to the associated roles in Fusion Analytics Warehouse. See [Manage Users, Groups, Application Roles, and Data Access](#).
  - Ensure custom security roles created in Oracle Fusion Cloud Applications (Cloud CX) appear in the Fusion Analytics Warehouse IDCS instance, and that users are appropriately mapped to security roles, data roles, and duty roles. See [Data Roles](#) and [Data Roles](#).

### Why do I not see data for a few metrics such as Facts - Conversion or Facts - Renewal?

Oracle Fusion CX Analytics has comprehensive metrics pre-calculated for various scenarios. For example, if your organization has a process to convert a Lead into an Opportunity, you'll see the metrics under the Facts - Conversion folder in the CX - Opportunity subject area. Similarly, various other metrics which are grouped under one or more folders are dependent on the data being available, which depends on whether that feature is enabled or used in the Oracle Fusion Cloud Applications CX source system.

For example:

- Facts Renewal shows data when there's an Opportunity Renewal process configured and used.

- Facts Conversion shows data when Leads are converted into Opportunities.
- Facts Competitive shows data if there are one or more competitors associated with the Opportunities.

### **Which functional area do I need to enable to see data in all the visualizations?**

Oracle Fusion CX Analytics has multiple functional areas, and these are based on the various applications that your organization uses (such as Oracle Fusion Cloud Sales Automation, Oracle Configure, Price, Quote, etc.). It's a good practice to enable only those functional areas that are applicable to your organization. The [Offerings and Functional Areas](#) section provides the mapping details of functional areas, the source they belong to, and which subject areas are enabled as a result of those functional areas. Depending on which functional areas are enabled, the related subject areas and dashboards or visualizations are available.



#### **Note:**

Users with FAW Service Administrator privileges can see all the visualizations regardless of whether they're available to your organization because this user has privileges to see all the content even if all content isn't available to specific users.

### **Why do I not see the data for Resource Hierarchy, that is all the owner-related dimensions (Opportunity Owner, Activity Owner, Lead Owner, etc.)?**

The hierarchy data is generated in the Oracle Fusion Sales application and is then loaded in Oracle Fusion CX Analytics. You need to first check whether the data exists in Oracle Fusion Sales application; the required job might not have run in Oracle Fusion Sales application. Follow the steps in [Run Processes to Complete Resource and Resource Hierarchy Creation](#).

### **Why do the count of Eloqua activities show minor differences from what I see in Eloqua Insight?**

The Campaign and the activities (mail Opens, Email Sent, Form Submitted etc.) are stored in the Eastern Time Zone (EST) in Eloqua. Therefore, the report that you see in Eloqua Insight is shown in the EST time. When the data is extracted in the Oracle Fusion Data Intelligence warehouse, it's converted to Coordinated Universal Time (UTC) because all the other data in Oracle Fusion Data Intelligence is in UTC. Therefore, combining Eloqua data in UTC with Sales/CPQ data in UTC gives the correct results. The difference in the Activity count is on account of the conversion of the timezone from EST to UTC.