Oracle Cloud Working with Oracle Sales Planning Cloud,
E95909-03

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YouTube - https://www.youtube.com/oracleepminthecloud
Welcome to Oracle Sales Planning Cloud

Related Topics

- **About Oracle Sales Planning Cloud**
  Oracle Sales Planning Cloud provides an extensible framework for planning and managing sales performance.

- **Learning More About Oracle Sales Planning Cloud**
  Use these resources to get more information or help about Oracle Sales Planning Cloud and related services.

- **Related Guides**
  See these related guides for more information about working with Oracle Sales Planning Cloud.

- **Navigating in Oracle Sales Planning Cloud**
  Review these useful tips for navigating in Oracle Sales Planning Cloud.

- **Working with Smart View**
  Oracle Smart View for Office provides a common Microsoft Office interface designed specifically for Oracle Enterprise Performance Management Cloud services, including Oracle Sales Planning Cloud.

About Oracle Sales Planning Cloud

Oracle Sales Planning Cloud provides an extensible framework for planning and managing sales performance.

Using Oracle Sales Planning Cloud enables you to automate critical processes by eliminating spreadsheets in key sales operations processes and improves collaboration for planning and modeling sales quotas.

Oracle Sales Planning Cloud is extensible using the EPM Cloud framework to further add additional configurations and personalization into your sales planning application with custom navigation flows, dashboards, and infolets. Use tasks and approvals to manage the quota planning process. Use Groovy rules to customize even further for enhanced calculation and business rules. Oracle Sales Planning Cloud can be integrated with Oracle Engagement Cloud – Sales Cloud for pushing quota targets to incentive compensation or bring in actual attainment.

Watch this overview video to learn more about Oracle Sales Planning Cloud.

![Overview Video.](overview_video_url)

About Quota Planning

The Quota Planning business process offers top-down and bottom up target quota planning by territory, product, account, or other custom dimensions. Use Predictive Planning and what if scenario planning to explore and compare different quota...
scenarios for informed decision making. Quota Planning builds best practices into its content, including its forms, calculations, dashboards, infolets, drivers, and measures.

Quota Planning helps you plan reliable target quotas by engaging all of the participants of the process, for example, the VP of Sales, Sales Operations, Sales Managers, and Sales Reps. Set a target quota for the next year. Then, optimize your results by making adjustments by product, applying padding or seasonality, or performing predictive planning or what-if analysis. When the target is ready, planners perform top-down or waterfall planning to allocate the target quota throughout the hierarchy.

If needed in your organization, you can also perform bottom up planning to get quota commitments from Sales Reps, allowing a collaborative approach. After the target quotas are pushed up to the next level of the hierarchy and aggregated, you can compare top down and bottom up results. Use the built-in dashboards to analyze and evaluate your quota plans with quota attainments.

Enhance the planning process in your organization by adding additional measures, task lists, or approvals.

Watch this overview video to learn more about Quota Planning.

Overview Video

Learning More About Oracle Sales Planning Cloud

Use these resources to get more information or help about Oracle Sales Planning Cloud and related services.

- Click Academy on the Home page.
- To get Help, click the arrow next to your user icon in the upper right corner of the screen, and then click Help.
- See related guides. See Related Guides.

Related Guides

See these related guides for more information about working with Oracle Sales Planning Cloud.

Oracle Sales Planning Cloud is supported by the many Oracle Enterprise Performance Management Cloud components.

To get started using Oracle Sales Planning Cloud, see these guides:

- Getting Started for Administrators
- Getting Started for Users

To extend the power and flexibility of Oracle Sales Planning Cloud, see the following guides. Note that some functionality described in the related guides may vary from what is available in Oracle Sales Planning Cloud. For example, Oracle Sales Planning Cloud does not allow classic dimension editor.
Design:

Designing with Calculation Manager for information related to designing Groovy rules.

User:

- Working with Planning
- Working with Smart View
- Working with Predictive Planning in Smart View
- Accessibility Guide

Administration:

- Administering Planning
- Administering Data Management
- Administering Access Control
- Administering Migration
- Working with EPM Automate
- Third-Party Acknowledgments

Development:

- Java API Reference for Groovy Rules
- Smart View for Office Developer's Guide

Navigating in Oracle Sales Planning Cloud

Review these useful tips for navigating in Oracle Sales Planning Cloud.

- To return to the Home page when you've navigated away from it, click the Oracle logo in the upper left corner (or your custom logo) or the Home icon.
- To see additional administrator tasks in the Navigator, click the horizontal bars next to the Oracle logo (or your custom logo)
- Expand a dashboard to full screen by clicking the Show/Hide bar at the top of the dashboard; click it again to return to normal view.
- Hover the cursor in the upper right corner of a form or dashboard to see a menu of options appropriate to the context, such as Actions, Save, Refresh, Settings, Maximize.
- In a subcomponent, use the horizontal and vertical tabs to switch tasks and categories.

For example, in the Quota Planning Set Targets component, use the vertical tabs to switch between reviewing overview dashboards, setting target quotas, and performing predictive planning. The vertical tabs are different depending on the features that are enabled. Use the horizontal tabs to switch categories within a task. For example, in Set Targets, choose between setting overall targets and adjusting targets by product.
The icon 📊 indicates a reporting form for reviewing data, not for data entry. The icon 🏗️ indicates that a form is a data entry form for entering planning details.

Working with Smart View

Oracle Smart View for Office provides a common Microsoft Office interface designed specifically for Oracle Enterprise Performance Management Cloud services, including Oracle Sales Planning Cloud.

You can download Smart View from the Settings and Actions menu. For details about downloading and connecting to Smart View, see Getting Started with Oracle Enterprise Performance Management Cloud for Users.

When working with Oracle Sales Planning Cloud in Smart View, access forms from Plan Sheets. For example, to set the quota target in Quota Planning, in Smart View, select Quota - Plan Sheets, then Quota - Set Targets, and then OQP_Set_Target.

For more information about working with Smart View, see Working with Oracle Smart View for Office.
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Working with Quota Planning

Related Topics

- **Quota Planning Methodologies**
  Quota Planning supports three methods for allocating a target quota.

- **Task Overview**
  Review the tasks you'll perform in Quota Planning. In general, you'll perform tasks in this order.

- **Setting User Variables**
  Each planner must set the user variables described in this topic.

- **Setting Quota Targets**
  Setting quota targets is the first step in the quota planning process.

- **Performing Top Down Planning**
  After the target quota is set, use top down planning to allocate the target quota.

- **Performing Bottom Up Planning**
  Bottom up planning is a collaborative approach performed in addition to top down planning.

- **Analyzing Quota Plans**
  The Quota Planning **Analysis** component provides predefined dashboards that give you insight into your quota plans.

Quota Planning Methodologies

Quota Planning supports three methods for allocating a target quota.

- **Top down planning**—Allocates the target quota starting at the highest level of the hierarchy down to each level of the dimension hierarchy, through the entire hierarchy. Use this method when target setting is centralized.

- **Waterfall planning**—Allocates the target quota starting at the highest level of the hierarchy step by step down to each level of the dimension hierarchy. Each level in the hierarchy reviews and makes adjustments before pushing the target quota down to the next level. Use this method when target setting is more decentralized with input from regional or business line sales leaders. One of the benefits of waterfall planning is that the adjustments made by sales managers are not visible to subordinates, who see only the adjusted target quota.

- **Bottom up**—A collaborative approach performed in addition to top down planning. After top down allocation is complete, each level in the hierarchy, starting with the lowest level, reviews their target quota, enters their quota commitments, and pushes them up to the next level in the hierarchy.

Depending on how your administrator configured the application, you can:

- Perform bottom up planning in addition to top down or waterfall planning, and then compare the results.

- Plan by territory or resource.
• Plan overlay target quotas in addition to your primary target quotas.

Task Overview

Review the tasks you’ll perform in Quota Planning. In general, you’ll perform tasks in this order.

1. Set user variables. See Setting User Variables.

2. Set a quota target for the next planning year at the All Territory or All Resource level. Sales Management or Sales Operations often performs this task. See Setting Quota Targets.

3. Adjust target quota if needed by product. See Adjusting Targets by Product.

4. Fine tune the target quota in one of these ways, and if desired, use the revised results for your target quota plan.
   • Use Predictive Planning to predict future values and optionally use predicted values in your plan. See Predicting Target Quota Values.
   • Perform what if planning by analyzing different scenarios for best case, worst case, and conservative case and optionally use one of these scenarios as your plan. See Performing What-If Analysis for Target Quota.

5. When the top level target quota is set, allocate the target quota using top down planning and make any required adjustments. See Performing Top Down Planning. The type of planning available is based on how your administrator set up the application:
   • For top down planning, see Performing Top Down Allocations. This is a single step process that pushes the target quota down through all levels of the hierarchy.
   • For top down waterfall planning, see Performing Top Down Waterfall Allocations. This is an iterative process. Each level of the hierarchy has a chance to review the allocated target quota, make adjustments, and then push the allocations down to the next level in the hierarchy.

Note:

If you adjust the overall target quota in Set Targets, you must allocate the target quota again.

6. If your company uses bottom up planning, perform bottom up planning after completing top down planning. Each level in the hierarchy, starting at the lowest level, reviews their allocated quota, makes any required adjustments, and pushes it up to the next higher level of the hierarchy for review and approval. See Performing Bottom Up Planning.

   Bottom up quota planning can be an iterative process, where a sales rep submits their target quota up to their manager, their manager makes an adjustment, and the sales rep reviews and resubmits. Quota Planning maintains two versions of the numbers: target version and bottom up version.

7. If required for your business, adjust the final target quota with padding. Someone at or near the top of the hierarchy usually performs this task. See Adjusting Quota Targets by Padding.
8. Analyze target quota using provided charts, dashboards, and infolets. If you perform both top down and bottom up planning you can compare the results. See Analyzing Quota Plans.

To get started, from the Home page, click Quota Planning and then select a component.

Note:
You might not see all the features described in this section, depending on what your Administrator has enabled, and the navigation flow might look different depending on what has been set up for your business.

<table>
<thead>
<tr>
<th>Task</th>
<th>Perform These Tasks</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Set Targets</td>
<td>Set a target quota for the next year and make adjustments before pushing the target quota down to the next level in the hierarchy. Setting targets is the first step in quota planning.</td>
<td>Setting Quota Targets</td>
</tr>
<tr>
<td>Top Down Planning</td>
<td>Perform top down planning and make adjustments.</td>
<td>Performing Top Down Planning</td>
</tr>
<tr>
<td>Bottom Up Planning</td>
<td>After completing top down planning, you can also perform bottom up planning and compare the results.</td>
<td>Performing Bottom Up Planning</td>
</tr>
<tr>
<td>Analysis</td>
<td>Analyze your quota plans with predefined dashboards.</td>
<td>Analyzing Quota Plans</td>
</tr>
</tbody>
</table>

Setting User Variables

Each planner must set the user variables described in this topic.

User variables define the context for forms and dashboards.

1. On the Home page, click Tools, and then User Preferences.
The **User Variables** page lists the user variables that the administrator has set up for each dimension and under **Member**, the currently selected member for each variable.

2. Select members for these user variables for Quota Planning:
   - Accounts
   - Overlay Territory—Typically used for the overlay territory.
   - Product
   - Sales Rep Territory—Typically used for Sales Reps for use in bottom up planning.
   - Scenario
   - Territory—Typically used for the main process for Sales Managers and Sales VPs.

3. Click **Save**.

## Setting Quota Targets

Setting quota targets is the first step in the quota planning process.

The target quota is the high-level strategic plan for the next year, set for the All Territory or All Resource Level—the highest level in the hierarchy. It’s usually set by someone in Sales Management or Sales Operations.

Set a target quota for the next year and make adjustments before allocating the target quota down the hierarchy. Planners perform top-down or waterfall planning and optionally bottom up planning to allocate the target quota throughout the hierarchy.

Quota targets are set at a yearly level:

- As a percentage, based on growth over last year’s actuals values
- As an absolute number
- By running a prediction and using the predicted value as the target

The **Set Targets** component provides several ways to help you set your quota targets.

Prerequisite: An administrator must have loaded the previous year’s bookings/revenue for all the territories or resources and run the **Process Actuals** rule.

From the Home page, click **Quota Planning**, and then click **Set Targets**.

Watch this tutorial video to learn more about setting quota targets.

[![Tutorial Video](image)](http://example.com/tutorial-video)
### Setting Quota Targets

Setting quota targets is the first step in the quota planning process.

The target quota is the high-level strategic plan for the next year, set for the All Territory or All Resource Level—the highest level in the hierarchy. It’s usually set by someone in Sales Management or Sales Operations.

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### Table 2-2  Setting Quota Targets

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overview</strong></td>
<td>See an overview of revenue and quota along with other important measures.</td>
<td>Analyzing Quota Targets with Dashboards</td>
</tr>
<tr>
<td><strong>Set Growth</strong></td>
<td>• Set your target quota using a growth rate method or by entering a value.</td>
<td>• Entering Target Growth Rates</td>
</tr>
<tr>
<td></td>
<td>• Adjust target quota values by product if required for your business.</td>
<td>• Adjusting Targets by Product</td>
</tr>
<tr>
<td></td>
<td>• Perform what-if analysis and adjust your target if needed based on best</td>
<td>• Performing What-If Analysis for Target Quota</td>
</tr>
<tr>
<td></td>
<td>case, worst case, and conservative scenarios.</td>
<td></td>
</tr>
<tr>
<td><strong>Predictive Planning</strong></td>
<td>Predict target quota values and compare to growth rate-based targets.</td>
<td>Predicting Target Quota Values</td>
</tr>
</tbody>
</table>
From the Home page, click **Quota Planning** , and then click **Set Targets**.

Watch this tutorial video to learn more about setting quota targets.

![Tutorial Video]

**Table 2-3  Setting Quota Targets**

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overview</strong></td>
<td>See an overview of revenue and quota along with other important measures.</td>
<td>Analyzing Quota Targets with Dashboards</td>
</tr>
<tr>
<td><strong>Set Growth</strong></td>
<td>• Set your target quota using a growth rate method or by entering a value. &lt;br&gt; • Adjust target quota values by product if required for your business. &lt;br&gt; • Perform what-if analysis and adjust your target if needed based on best case, worst case, and conservative scenarios.</td>
<td>• Entering Target Growth Rates &lt;br&gt; • Adjusting Targets by Product &lt;br&gt; • Performing What-If Analysis for Target Quota</td>
</tr>
<tr>
<td><strong>Predictive Planning</strong></td>
<td>Predict target quota values and compare to growth rate-based targets. Optionally, use predicted values as your target quota.</td>
<td>Predicting Target Quota Values</td>
</tr>
</tbody>
</table>

**Entering Target Growth Rates**

Enter your target quota for the upcoming planning year.

Quota planning is done for the next planning year, based on growth over last year’s actuals values, at the All Territory or All Resource level. You can also directly enter a value for the target.

1. From the Home page, click **Quota Planning** , then click **Set Targets** , and then click **Set Growth** .

2. In **Plan YOY Growth %** enter a percentage growth rate from the previous year’s revenue for All Territories or All Resources, and then click **Save**. Alternatively, you...
can enter a value in **Plan Target Quota**. The **Plan YOY Growth %** is calculated for you. Target Quota is updated and the charts and dashboards reflect the target quota. Average quota per rep is also calculated.

Next, make any adjustments to the target quota:

- Adjust target quota values by product if required for your business. See **Adjusting Targets by Product**.
- Perform what-if analysis and adjust your target if needed based on best case, worst case, and conservative scenarios. See **Performing What-If Analysis for Target Quota**.
- Predict target quota values and compare to growth rate-based targets. Optionally, use predicted values in your plan. See **Predicting Target Quota Values**.

When the target quota is ready, allocate it using top down or waterfall planning. See **Performing Top Down Planning**.

**Adjusting Targets by Product**

If you are planning by Product, you can fine tune your quota target by adjusting target quota values by product.

Initially, all products have the same year over year growth percentage as set in the **Set Overall Targets** tab. Adjust by product as required for your business.

1. From the Home page, click **Quota Planning**, then click **Set Targets**, and then click **Set Growth**.
2. Click **Adjust Targets by Product**.
3. Adjust the target quota year over year growth percentage for each product.
4. If you've planned for different scenarios, to adjust quota by product for different scenarios, select the scenario from the list, and then enter adjusted quota targets.
5. Click **Save**. Year over year growth percentage is adjusted based on your changes.
6. To see the adjusted overall target, click **Set Overall Targets**.

**Performing What-If Analysis for Target Quota**

After you've set your initial target quota for the planning year, you can perform what-if analysis to evaluate different scenarios.

Evaluate best case, worst case, and conservative scenarios compared to your base plan, and optionally use the values in your plan.
1. From the Home page, click Quota Planning, then click Set Targets, and then click Set Growth.

2. On the Set Overall Targets horizontal tab, from the Actions menu, click Seed What If Scenarios.

3. Enter percentage values for Worst Case, Best Case, and Conservative scenarios compared to the base plan, and then click Launch. Additional data and charts are added to the Set Overall Targets page so you can evaluate and compare best case, worst case, and conservative scenarios to your base plan.

   **Tip:**
   On the Adjust Targets by Product page, change the scenario in the POV to see the different scenarios by product.

4. To copy data from a scenario back to your Plan Target Quota, from the Actions menu, click Copy Data What If, select source and target scenarios, and then click Launch. To clear the what if scenarios, from the Actions menu, click Clear What If Scenarios.

**Predicting Target Quota Values**

If you have historical revenue data by territory or resource, you can perform a statistical analysis on the data to predict future revenue results.

Running Predictive Planning predicts future revenue by territory or resource. Using a predicted result leaves the guesswork out of setting your targets. When you run a prediction, historical data for each member on the form is retrieved and then analyzed using time series forecasting techniques to predict the future performance for these members. The more years of historical data you have, the more accurate the prediction will be.

1. From the Home page, click Quota Planning, then click Set Targets, and then click Predict Targets.

2. By default, Predictive Planning predicts future revenue at the All Territory or All Resource level. To predict at a different level, change the POV.

3. From the Actions menu, select Predictive Planning. The prediction runs, and a results area opens below the form with a chart and detailed information about the prediction.

   Use the results to compare the predicted values to your planned target values for each member, along with values for worst case and best case scenarios.
See Predicting Future Values Based on Past Performance for more information about working in the prediction area.

You can also change the chart display and change historical and future date ranges for the prediction. See Customizing the Chart.

4. To see overall predicted revenue compared to last year’s bookings and your overall planned target quota, click Set Growth and review the Predicted Revenue column. If needed, adjust your YOY Growth %.

5. For a more accurate and statistically-based plan, you can use predicted values as the target. Click Set Growth and then from the Actions menu, select Set Predictive As Target.

The target quota is updated to use the predicted value.

Analyzing Quota Targets with Dashboards

Predefined dashboards give you insight into overall quota planning. You can drill in to members in dashboard charts to see the level of detail you want.

At any time during your quota planning process, use the dashboards in Set Targets to get an overview of your revenue and quota plans.

1. From the Home page, click Quota Planning, and then click Set Targets.

2. Click Overview.

Performing Top Down Planning

After the target quota is set, use top down planning to allocate the target quota.

Depending on how your administrator set up the application, perform either top down planning or waterfall planning.

- Top down—When target setting is centralized, planners perform top down planning to allocate the target quota starting at the highest level of the hierarchy down to each level of the dimension hierarchy, through the entire hierarchy.

- Top down waterfall—When target setting is decentralized with input from all levels of the hierarchy, planners perform waterfall planning to allocate the target quota starting at the highest level of the hierarchy step by step down to each level of the dimension hierarchy. Each level in the hierarchy reviews and makes adjustments before pushing the target quota down to the next level.

Planners can make adjustments to the quota target before allocating it:

- Adjust by product, for example to modify quotas to plan for portfolio changes.
• Adjust by account, for example to modify quotas if historical data doesn’t reflect customer potential.
• Adjust for seasonality and periods, for example to reflect consumer and sales trends or holiday periods.
• Adjust by padding.

From the Home page, click Quota Planning, and then click Top Down Planning.

Watch this tutorial video to learn more about top down planning.

![Tutorial Video]

Table 2-4  Top Down Planning Tasks

<table>
<thead>
<tr>
<th>Top Down Planning</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Down</td>
<td>Review your target quota and make any required adjustments before allocating the target quota to all levels in the hierarchy: • Perform top down allocation • Adjust allocations by product or account • Adjust allocations using seasonality • Adjust allocations by padding. This is the final step in the quota planning process.</td>
<td>• Performing Top Down Allocations • Adjusting Allocated Quota Targets By Product or By Account • Adjusting Allocated Quota Targets for Seasonality • Adjusting Quota Targets by Padding</td>
</tr>
<tr>
<td>Top Down Waterfall</td>
<td>Review your target quota and make any required adjustments before allocating the target quota to the next level of the hierarchy: • Perform top down waterfall allocation • Adjust allocations by product or account • Adjust allocations using seasonality</td>
<td>• Performing Top Down Waterfall Allocations • Adjusting Allocated Quota Targets By Product or By Account • Adjusting Allocated Quota Targets for Seasonality</td>
</tr>
<tr>
<td>Padding</td>
<td>Adjust allocations by padding. This is the final step in the quota planning process.</td>
<td>Adjusting Quota Targets by Padding</td>
</tr>
</tbody>
</table>
Table 2-4  (Cont.) Top Down Planning Tasks

<table>
<thead>
<tr>
<th>Top Down Planning</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image.png" alt="Top Down Multi Currency Analysis" /></td>
<td>If the application uses multiple currencies, users can review quota measures in their own currency. For example, if quota is set across the hierarchy using the main currency USD, a user in France can review the data in Euros. Select the reporting currency from the POV, and then from the Actions menu, click Business Rules, and then click the Calculate Currencies rule.</td>
<td>Planning Using Overlay Targets</td>
</tr>
<tr>
<td><img src="image.png" alt="Overlay Targets" /></td>
<td>Plan overlay targets for supporting teams.</td>
<td></td>
</tr>
</tbody>
</table>

Performing Top Down Allocations

Review the target quota and make any required adjustments before allocating the target quota down to all levels in the hierarchy.

With top down planning, the top level target quota is spread through all levels in the hierarchy based on historical data.

1. From the Home page, click **Quota Planning** and then click **Top Down Planning**.

2. On the **Top Down** vertical tab, on the **Top Down** horizontal tab, review the target quota information.

3. From the **Actions** menu, select **Top Down Allocation**. The target quota is allocated to all levels of the hierarchy.

4. To make adjustments, click the **Review and Adjust** horizontal tab, and then in the **All Territory Target** area, make adjustments in **Adjustment Value** if needed, and then click **Save**. Depending on how your administrator set up the application, you might not be able to allocate so that adjusted values go over or under the allocated quota amount. If your administrator requires it, you must ensure that adjusted values equal the overall **Allocated Quota**.
5. Make any adjustments by product or account, or for seasonality. See Adjusting Allocated Quota Targets By Product or By Account and Adjusting Allocated Quota Targets for Seasonality.

6. As the last step in the quota planning process, senior managers can apply padding if required. See Adjusting Quota Targets by Padding.

Performing Top Down Waterfall Allocations

Review your allocated target quota and make any required adjustments before submitting the quota to the next level of the hierarchy.

The top level target quota is spread throughout the hierarchy based on historical data. With top down waterfall planning, each level in the hierarchy can review their allocated target quota, make adjustments if needed, and push to the next level of the hierarchy.

1. From the Home page, click Quota Planning, and then click Top Down Planning.

2. On the Top Down Waterfall vertical tab, on the Top Down and Adjust tab, in the My Target area, select your level of the territory or resource hierarchy from the POV if needed.

3. Review your allocated quota and then from the Actions menu, select Waterfall Allocation.

The quota is pushed down to the next level of the hierarchy and the My Team Target area is updated with Allocated Target Quota values.

The Waterfall Allocation rule pushes down the allocation distribution based on last year's bookings across products, accounts, time periods, or other dimensions depending on the dimensionality of your application.

4. In the My Team Target area, review the Allocated Target Quota and make adjustments in Adjustment Value if needed, and then click Save.

Depending on how your administrator set up the application, you might not be able to allocate so that adjusted values go over or under the allocated quota amount. If your administrator requires it, you must ensure that adjusted values equal the overall Allocated Quota.

5. Make any adjustments by product or account, or for seasonality. See Adjusting Allocated Quota Targets By Product or By Account and Adjusting Allocated Quota Targets for Seasonality.

6. Based on the system set up in your organization, notify the next lower level in the hierarchy. Now the next level down in the hierarchy can go through this same process. Repeat the process until the target quota is allocated to the lowest level in the hierarchy.

7. As the last step in the quota planning process, senior managers can apply padding if required. See Adjusting Quota Targets by Padding.
If your team is also performing bottom up planning, apply padding after the bottom up planning process is complete.

Adjusting Allocated Quota Targets By Product or By Account

You can make adjustments to the allocated quota for your team by product or account.

1. From the Home page, click Quota Planning, and then click Top Down Planning.

2. On the Top Down Waterfall or Top Down vertical tab, click the Adjust by Product or Adjust by Account horizontal tab.

3. In the My Team's Target By <Product or Account> area (for waterfall planning) or the All Territory By <Product or Account> area (for top down planning), change the values in Adjustment Value for each product or account and then click Save. You can't enter values that would go over the overall target value, and the overall target is not changed by values you enter here.

Depending on how your administrator set up the application, you might not be able to allocate so that adjusted values go over or under the allocated quota amount. If your administrator requires it, you must ensure that adjusted values equal the overall Allocated Quota.

Adjusting Allocated Quota Targets for Seasonality

By default, quota targets are spread based on historical data, however if needed you can adjust the spreading by season.

Make adjustments for each month for the upcoming planning year, for example to reflect consumer and sales trends or holiday periods. This option overwrites the original spreading with the seasonally adjusted spreading.

1. From the Home page, click Quota Planning, and then click Top Down Planning.

2. On the Top Down Waterfall or Top Down vertical tab, click the Seasonality and Period Spread horizontal tab.

3. Adjust percentages for each period. Depending on how your administrator set up the application, you might not be able to allocate so that adjusted values go over or under the allocated quota amount. If
your administrator requires it, you must ensure that adjusted values equal the overall Allocated Quota.

4. From the Actions menu, select Apply Seasonality. The target quota grid and charts are updated with the newly spread values. The seasonality changes are applied to the parent and children members.

Adjusting Quota Targets by Padding

After your top level target quota is final, you can pad the results.

Padding is a final company-wide adjustment at the top level to adjust the whole target quota, for example to modify quotas in anticipation of known or possible risks. Typically padding is the last step in the quota planning process, performed after top down and bottom up planning is complete. Typically someone at or near the top of the hierarchy performs this task.

1. From the Home page, click Quota Planning, and then click Top Down Planning.

2. Click Padding.

3. Enter a padding percentage in the Input Padding % column, and then click Save.

4. From the Actions menu, click Business Rules, and then launch the Top Down Padding rule.

5. Review the padding adjustment value and the final target quota in the My Team's Final Target area.

   Note:

   If you make any further adjustments or re-allocate, you must adjust the padding again.

Planning Using Overlay Targets

You can plan using overlay targets for those not directly responsible for the quota who provide a support role in meeting quota targets.

For example, plan quotas for Specialist Sales, who support the main sales teams, using overlay targets. Their quotas are measured on impacted revenue.

Overlay growth percentage is based on a percentage over last year impacted bookings.
Performing Bottom Up Planning

Bottom up planning is a collaborative approach performed in addition to top down planning.

With bottom up planning, each Sales Rep gets involved in the process. After top down allocation is complete, each level in the hierarchy, starting with the lowest level, reviews their final top down quota, makes required adjustments for their accounts, and submits their expected quota to the next higher level of the hierarchy.

Bottom up quota planning can be an iterative process, where a sales rep submits their target quota up to their manager, their manager makes an adjustment, and the sales rep reviews and resubmits.

Bottom up planning allows you to add a new product or account and allocate quota to it. So you can allocate even if there is no historical data.

Your administrator might have set up an approvals process to manage this workflow.

From the Home page, click Quota Planning, and then click Bottom Up Planning.

Watch this tutorial video to learn more about bottom up planning.
Table 2-5  Bottom Up Planning Tasks

<table>
<thead>
<tr>
<th>Bottom Up Planning</th>
<th>Description</th>
<th>More Information</th>
</tr>
</thead>
</table>
| **Plan Quotas**    | The lowest level in the hierarchy (for example, a sales rep) reviews their target quota, makes any required adjustments, and then submits the target quota to the next higher level in the hierarchy for approval: | • Preparing Bottom Up Quota Plans  
• Adjusting Bottom Up Quotas by Product  
• Performing What If Analysis for Bottom Up Quota Plans |
|                    | • Plan your target quota, and if needed, add another account to plan against | |
|                    | • Adjust your target quota by product, and if needed, add a product to adjust by | |
|                    | • Review and evaluate different scenarios for your target quota | |
| **Manage Quotas**  | Managers review their team’s proposed target quotas, make adjustments, and submit to the next higher level of the hierarchy: | • Reviewing and Adjusting Your Team’s Bottom Up Target Quota (for Managers)  
• Adjusting Bottom Up Plans by Product (for Managers)  
• Adjusting Bottom Up Quota Targets for Seasonality (for Managers) |
|                    | • Review and adjust quota targets | |
|                    | • Adjust quota targets by product | |
|                    | • Adjust target quota for seasonality | |
| **Multi Currency Analysis** | If the application uses multiple currencies, users can review quota measures in their own currency. For example, if quota is set across the hierarchy using the main currency USD, a user in France can review the data in Euros. Select the reporting currency from the POV, and then from the Actions menu, click Business Rules, and then click the Calculate Currencies rule. | |  

Preparing Bottom Up Quota Plans

The lowest level in the hierarchy (for example, a sales rep) reviews their target quota, makes any required adjustments, and then submits the target quota to the next higher level in the hierarchy for approval.
1. From the Home page, click Quota Planning, then click Bottom Up Planning, and then click Plan Quotas.

2. On the Plan Quota horizontal tab, change the POV to reflect your level in the hierarchy if needed.

3. In the My Summary Quota area, review the top down quota allocated to you by your manager, along with the overall growth percentage.

4. In the Set Quota area, enter your proposed target quota for each account, and then click Save.

**Note:**
If you need to plan against another account, you can add an account that already exists in the hierarchy. In the Set Quota area, from the Actions menu, select Add Account. Select the account to add, enter the proposed quota amount, and then click Launch.

5. In the My Summary Quota area, from the Actions menu, select Aggregate Quota.

6. Make any adjustments by product or perform what-if planning to evaluate different scenarios. See Adjusting Bottom Up Quotas by Product and Performing What If Analysis for Bottom Up Quota Plans.

Based on the system set up in your organization, when your quota plan is complete, notify the next higher level in the hierarchy. Now the next level up in the hierarchy can review and make adjustments to their team's quota. See Reviewing and Adjusting Your Team’s Bottom Up Target Quota (for Managers).

### Adjusting Bottom Up Quotas by Product

After you've estimated your bottom up quota, you can adjust the quota allocation amounts by product.

1. From the Home page, click Quota Planning, then click Bottom Up Planning, and then click Plan Quotas.

2. Click the Adjust by Product horizontal tab.

3. In the Set Quota by Product area, change the values for each product and then click Save.
Performing What If Analysis for Bottom Up Quota Plans

Sales reps can fine tune their target before pushing it up to the next level in the hierarchy.

1. From the Home page, click Quota Planning, then click Bottom Up Planning, and then click Plan Quotas.
2. Click the Scenario Comparison and Analysis horizontal tab.
3. From the Actions menu, select Seed What If Scenarios.
4. Enter percentage values for Worst Case, Best Case, and Conservative, and then click Launch.
   Additional data and charts are added to the page so you can evaluate and compare best case, worst case, and conservative scenarios to your plan quota.
5. To copy data from a scenario back to your plan, from the Actions menu, click Copy Data What If, select source and target scenarios, and then click Launch.
   To clear the what if scenarios, from the Actions menu, click Clear What If Scenarios.

Reviewing and Adjusting Your Team's Bottom Up Target Quota (for Managers)

When your team has completed their bottom up quota targets, you can review the targets and make adjustments before pushing up to the next level of the hierarchy.

1. From the Home page, click Quota Planning, then click Bottom Up Planning, and then click Manage Quotas.
2. On the Manager Quota Review and Adjust horizontal tab, change the POV to reflect your level in the hierarchy if needed.
3. From the Actions menu, select Aggregate Quota.
   The rule aggregates the numbers for your team in the next lower level of the hierarchy.
4. In the My Team's Quota area, make any changes in the Adjustment Value column and then click Save.
For bottom up planning, this value is not restricted.

5. In the **My Summary Quota** area, review the **Adjusted Value** and **Adjusted Quota**.

6. Make any adjustments by product or for seasonality. See **Adjusting Bottom Up Plans by Product (for Managers)** and **Adjusting Bottom Up Quota Targets for Seasonality (for Managers)**.

7. When adjustments are complete, on the **Manager Quota Review and Adjust** horizontal tab, from the **Actions** menu, select **Aggregate Quota**.

Based on the system set up in your organization, notify the next higher level in the hierarchy. Now the next level up in the hierarchy can go through this same process. Repeat the process until the target quota is allocated to the highest level in the hierarchy.

When bottom up planning is complete, managers can review and compare top down and bottom up target quota, add padding if required, and finalize the quota plan.

### Adjusting Bottom Up Plans by Product (for Managers)

Managers can adjust their team's bottom up plans by product before submitting to the next higher level in the hierarchy.

1. From the Home page, click **Quota Planning**, then click **Bottom Up Planning**, and then click **Manage Quotas**.

2. Click the **Manager Adjust by Product** horizontal tab.

3. In the **My Team Quota by Product** area, change the values in **Adjustment Value** for each product and then click **Save**.
   
   For bottom up planning, this value is not restricted.

4. When adjustments are complete, on the **Manager Quota Review and Adjust** horizontal tab, from the **Actions** menu, select **Aggregate Quota**.

### Adjusting Bottom Up Quota Targets for Seasonality (for Managers)

By default, quota targets are spread based on historical data, however you can adjust the spreading if needed by season.

Make adjustments for each month for the upcoming planning year, for example to reflect consumer and sales trends or holiday periods. This option overwrites the original spreading with the seasonally adjusted spreading.

1. From the Home page, click **Quota Planning**, then click **Bottom Up Planning**, and then click **Manage Quotas**.

2. Click the **Seasonality and Period Spread** horizontal tab.
3. Adjust percentages for each period.

4. From the Actions menu, select Apply Seasonality. The grid and charts are updated with the newly spread values.

5. When adjustments are complete, on the Manager Quota Review and Adjust horizontal tab, from the Actions menu, select Aggregate Quota.

Analyzing Quota Plans

The Quota Planning Analysis component provides predefined dashboards that give you insight into your quota plans.

To analyze Quota Planning target quota, from the Home page, click Quota Planning, then click Analysis, and then select the type of analysis to review.

Table 2-6 Analyzing Quota Plans

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quota Analysis</td>
<td>Review top down quota analysis, bottom up quota analysis, or compare top down and bottom up results.</td>
</tr>
<tr>
<td>Analysis by Dimensions</td>
<td>Analyze quota plans by product or account, depending on the features enabled for the application.</td>
</tr>
</tbody>
</table>

Additionally, use the provided infolets to gain quick insights into data to help guide your decisions and actions. From the Home page, click the Infolet dots towards the top of the Home page.
Accessibility

Oracle customers have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

For information about Oracle’s commitment to accessibility, visit the Oracle Accessibility Program website.

All videos for this cloud service have HTML equivalent topics.

Enabling Accessibility Settings

To enable accessibility settings, click the button at the top right of the Home page to open a dialog box with options for Screen Reader Mode and High Contrast mode.

Recommendations

If you use screen reading software, Oracle recommends that you use Internet Explorer. Some service component screens may not display properly if you use Google Chrome.

General Considerations and Notes

Note these general considerations for using keyboard equivalents and for online help.

Using Keyboard Equivalents

When you use keyboard equivalents, note that:

- The underlined letter that typically appears in a menu title, menu item, or button text is called a mnemonic. Because Oracle considers mnemonics to be self-documenting, additional documentation for mnemonics is not necessarily provided. You can use mnemonics where they are implemented.
- Some mnemonics are repeated. For example, on the File menu, the underlined mnemonic D is used for both the Delete and the Deactivate menu items. When mnemonics are repeated, the first time you press D, the item to be deleted is highlighted. Press Enter to delete or press D again to highlight the Deactivate button, and then press Enter to deactivate.
- Keystrokes listed are standard for PCs. iOS standard keys may be different.

For additional information, see Keyboard Equivalents.
Online Help

When screen reader support is enabled, the help window is rearranged so that the help topic is first in document order, displaying above the help toolbar. This is to ensure that the screen reader reads the help topic first when online help is invoked.

Additional information you may need when using online help:

- To help screen reader users, when a page loads in the Help Topic frame, scripting shifts focus to the loaded document. For example, when help is opened, focus is set on the Help Topic frame document.

- Use the Virtual PC Cursor option in the screen reader to read the help topic. Press Insert+Z to toggle the Virtual PC Cursor and use JAWS commands to read the text.

- HTML elements such as form controls typically function as would be expected for your browser (and screen reader, if applicable). Exceptions:
  - Contents page: The tree that displays the selected help system's table of contents, includes these link types:
    * Links containing the target topic titles. If you activate these links, the target topic opens in the Help topic frame, and focus moves to that topic.
    * Links that open subtopics. When focus is on these links, screen reader reads one of the following:
      * Collapse Node if the subtopic links are expanded; activating the link removes the subtopic links from the tab order.
      * Expand Node if the subtopic links are collapsed; activating the link places the subtopic links in the tab order.
    After activating this type of link, the next link in the tab order is the topic, followed by any subtopics.
    These links are located before their corresponding topic links in tab order. Press Shift+Tab to determine whether a topic has subtopics; if the screen reader reads Expand Node or Collapse Node, then the topic has subtopics.

  - Index and Contents pages: When a selection is made from the Select product drop-down list, the values currently on the Select help system drop-down list change to reflect the help system types available for the product. After changing the product, you must select the desired help system type.

- Search page:
  - If you are using a screen reader, and are in the search form or the forms to select a different help system in the Index and Contents tabs, the screen reader may use the Enter key for some purpose other than submitting the form. For example, the screen reader may use Enter to toggle Forms Mode in some contexts. If that happens, you can submit the form by using the shortcut for moving focus to the next button.
  - If the All checkbox is selected in Search help for the following products, any selected product check boxes are cleared.
– If the All checkbox is selected in Search help for the following products and then a product checkbox is selected, the All checkbox is cleared.

– If the All checkbox is selected in Search help for the following products, any selected help type check boxes are cleared.

– If the All checkbox is selected in Search help for the following products, and then a help type checkbox is selected, the All checkbox is cleared.

**Table A-1  Online Help — Keyboard Shortcuts**

<table>
<thead>
<tr>
<th>Keys</th>
<th>Action</th>
</tr>
</thead>
</table>
| Ctrl+Shift+1      | Open and move focus to the Table of Contents page, in the Navigation frame. The displayed Table of Contents entries are for the help system that contains the currently displayed help topic. The Table of Contents consists of frames containing the following:  
  • A form to select a Table of Contents for a different help system. If you select a different help system, the help topic frame is also updated to display the help system's launch page.  
  • The Table of Contents links.                                                                                                                 |
| Ctrl+Shift+2      | Open and move focus to the index, in the Navigation frame. The displayed index entries are for the help system that contains the currently displayed help topic. The index consists of frames containing the following:  
  • A form to select an index for a different help system. If you select a different help system, the help topic frame is also updated to display the help system's launch page.  
  • Shortcut links to index entries, which are grouped by letter.  
  • Index entry links                                                                                                                                 |
| Ctr+Shift+3       | Open and move focus to the Search frame in the Navigation frame.                                                                                                                                               |
Table A-1  (Cont.) Online Help — Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Keys</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl+Shift+4</td>
<td>Move focus to the content frame, which is the frame that contains help topics and search results.</td>
</tr>
</tbody>
</table>

**Note:**
If a page is not reading as expected, try toggling off Forms Mode.

<table>
<thead>
<tr>
<th>Keys</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrl+Shift+5</td>
<td>Move focus to the toolbar frame, which contains links to various help features.</td>
</tr>
</tbody>
</table>

**Note:**
The toolbar includes a link to the help topic describing accessibility information.

### Accessibility Features

These features are provided:

- Support for screen readers and magnifiers
- Keyboard navigation equivalents for all objects
- *Alt* and *Title* attributes for all objects, images, and page titles
- Support for expanding and collapsing trees using the *Enter* key and keyboard equivalents
- Data form access using keyboard equivalents
- Tab indexing, implemented from left to right on all pages
- A button at the top right corner of the page opens a dialog box with options for screen reader mode and high contrast
Using Screen Reader Mode

- In rule launch windows, select the corresponding buttons to invoke the member selector for runtime prompts.
- If, after you perform validations, cells contain errors, you must tab through each cell to locate those with errors. Clicking error messages in the Data Validation Summary does not place focus on the corresponding cell with errors.
- If you launch a secondary dialog box such as the member selector while in screen reader mode, in the simplified interface you must exit the dialog box by pressing the Esc key or other control button. In the standard interface, press Alt+2 to switch focus from the main dialog box to the secondary dialog box. You can then tab to navigate the dialog box.
- Use buttons, radio buttons, and check boxes for selection.
- For information icons, click icons for additional information.
- Popups appear in a new page. When a popup such as a confirmation message appears on save or rule launch, use the Down Arrow keys to read the message after the screen reader announces the popup. Use the same process for informational popups.
- Graphs and charts do not display; everything is rendered in table format. Use Ctrl and Alt, with the arrow keys to read the content of such tables.
- Turn PC Cursor Mode on when tabbing through read-only fields in a table. Turn PC Cursor Mode off when entering data in editable fields.
- Use Ctrl and Alt with the arrow keys to read the contents of both read-only and editable tables, such as user variables, across all applications.
• When creating dashboards in screen reader mode, the links displayed in the left pane are not available for creating content in widgets. Instead, you can use the Chart, URL, and Commentary links within the widget to create content.

• To read the content of a text area, select all text inside the text area by pressing Ctrl+A.

• When the screen reader is on, to close any open dialog boxes, press Escape twice.

• To exit a popup when the screen reader is on, press the Escape key. To exit informational messages when the screen reader is on, press Tab.

Note:

In the left pane tree table, select the radio button adjacent to the items that are to be invoked, such as forms.