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Preface

This preface introduces information sources that can help you use the application.

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

Watch: This video tutorial shows you how to find help and use help features.

You can also read Using Applications Help.

Additional Resources

- Community: Use Oracle Cloud Customer Connect to get information from experts at Oracle, the partner community, and other users.

- Guides and Videos: Go to the Oracle Help Center to find guides and videos.

- Training: Take courses on Oracle Cloud from Oracle University.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>boldface</strong></td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td><strong>monospace</strong></td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

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

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

Comments and Suggestions
Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
1 About This Guide

Audience and Scope

This guide is intended for administrators and other job roles tasked with creating, modifying, and administering Sales Cloud analytics. The guide assumes that you have the permissions to perform the following tasks:

- Enable and edit Sales pages and content on those pages for all the sales roles
- Edit analytics that come with the application
- Build new analytics and subject areas as needed, and configure them to show role-specific data to the logged in user
- Access all analytics with full read write permissions

For information on Sales Cloud implementation, security, and other topics, see the guides in the Related Guides section of this chapter.

Related Guides

For additional Sales Cloud learning resources, refer to the Oracle Help Center, application online help, and Oracle University. This table shows a list of guides that contain information related to the areas covered in this guide.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Engagement Cloud Implementing Service Request Management</td>
<td>This guide contains information about the analytics that are specific to service request management. Engagement Cloud extends Sales Cloud with service request management and knowledge management capabilities that enable organizations to better serve customers and partners by helping capture, manage and share service issues related to accounts, partners, and contacts.</td>
</tr>
<tr>
<td>Getting Started with Your Sales Cloud Implementation</td>
<td>This guide is for the start-up administrator who gets the application up and running, including setting up roles for which you will create analytics. This guide includes detail about sales roles, and setting up sales roles. This guide leverages the default settings provided by Oracle and does not provide detailed explanations of all available features.</td>
</tr>
<tr>
<td>Securing Oracle Sales Cloud</td>
<td>This guide contains detail about user permissions and role-based access to application objects and functionality. Access to analytics is defined by user roles. This guide describes how to enable user access to Oracle Sales Cloud functions and data. Some of the tasks described in this guide are performed only or mainly during implementation of Oracle Sales Cloud. Most, however, can be performed at any time and as new requirements emerge.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Help Center
## 2 Overview of Sales Cloud Analytics

### Understanding Analytics Terminology

This topic lists terms that describe the work areas and analytic concepts administrators should understand for the information in the analytics topics.

This table contains a list of terms that are used for the information on creating and administering analytics:

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analytic/Analytics</td>
<td>The analytics topics talk about analytics as an aggregate, or the broader term in which analysis/analyses reports, infolets, and dashboards, would be included, where applicable. Reports and analyses are both a type of analytic.</td>
</tr>
<tr>
<td>Analysis/Analyses</td>
<td>An analysis is a type of analytic used primarily for online presentation on desktop computers, laptop, or mobile devices. Analytics topics use the term analysis/analyses to refer to an individual analysis, or a group of individual analyses which are one piece of a complete analytic solution. Analyses can come prebuilt, or can be built to meet the custom needs of a sales organization.</td>
</tr>
<tr>
<td>Analytic Work Area</td>
<td>Analytic work area is a work area that is configured to show analytics for sales users. Administrators enable and configure most of the work areas with analytics for sales users. Some analytic pages are designed to show analyses only, like the Analysis page, the Sales Infolet and Sales Pages. Other work areas provide analytics tabs to augment pages sales teams use for managing their daily sales activities, such as on the Opportunities and Activities pages.</td>
</tr>
<tr>
<td>Column</td>
<td>The term column in the context of creating analytics is used to describe the objects that hold the data that populates an analysis. The columns are attributes of the subject area dimensions and you drag the columns to the palette as you build your analytics. Once in an analysis, a column is represented as an actual vertical column of data, in the standard table format.</td>
</tr>
<tr>
<td>Fact Folders/Facts</td>
<td>The Fact folders contain filters to count or measure the information in an analysis. Facts are pieces of information that are calculated using standard operators such as addition, subtraction, and so on.</td>
</tr>
<tr>
<td>Infolet</td>
<td>An infolet is a small container or &quot;widget&quot; on the Sales Infolet page that holds an analytic. Administrators can configure the infolet shape and size. The Sales Infolet page holds up to six infolets. You can add, edit, or remove the infolets as well as change the analytic content in the infolet.</td>
</tr>
<tr>
<td>Key Performance Indicator (KPI)</td>
<td>Key Performance Indicators are values that analytics provide to help sales organizations get a snapshot of how well they are performing in a particular context and compared to specific goals or quotas.</td>
</tr>
<tr>
<td>Navigator</td>
<td>Navigator is represented by an icon with four parallel white lines on the Home page. When you click the Navigator icon you go to a page that shows all the options for sales users to manage and monitor their sales activities. Administrators see options for managing the application.</td>
</tr>
<tr>
<td>Oracle Business Intelligence Answers (BI)</td>
<td>BI is a major work area for administrators. You view, edit, and create analytics, as well as custom subject areas in BI. Your subject areas can be viewed when you select the New analysis option.</td>
</tr>
</tbody>
</table>
Overview of Sales Cloud Analytics

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report</td>
<td>A report is a type of analytic used primarily for published presentation. Types of reports might be financial documents, human resource spreadsheets, and so on. The wizard for building a report walks you through a series of options for formatting the layout of the report.</td>
</tr>
<tr>
<td>Sandbox</td>
<td>A sandbox is a testing stage you use to add and view changes to the interface without actually implementing your changes. To implement your changes and overwrite the existing public interface with a version which includes your changes, you must take additional steps to publish your sandbox.</td>
</tr>
<tr>
<td>Sales Cloud Home Page</td>
<td>The landing page for the Oracle Sales Cloud application.</td>
</tr>
<tr>
<td>Sales Icon</td>
<td>An icon on the Home Page represented by an image of a stack of papers. The Sales Icon links to a page that contains icons with links to all of the major work areas for sales users.</td>
</tr>
<tr>
<td>Subject Area</td>
<td>Subject areas are the building blocks of your analytics. You begin building your analytics by choosing an appropriate subject area. Technically, subject areas are a grouping of information pieces called data objects that relate to each other in a particular context. Examples of context are pipeline, revenue, partners, performance, and so on.</td>
</tr>
<tr>
<td>White Dot Page Controls</td>
<td>The white dot page controls on the Home Page that link to the Infolet Sales Page and the Sales Pages. Both of these pages are enabled by administrators for users.</td>
</tr>
</tbody>
</table>

Overview of Your Analytics Work Areas

As an administrator, your job is to create, edit, and maintain analytics for your organization. You can use the prebuilt analytics, you can modify the prebuilt analytics, or you can create your own.

Administrators determine which analytics to use, and then add them to user work areas. Sales users with specific roles see analytics you make available. For example, a sales representative sees analyses such as My Performance, or My Pipeline. Other roles, such as sales managers see team analytics, such as My Team’s Performance.

The following table describes the areas administrators use to provide analytics to their sales users.

<table>
<thead>
<tr>
<th>Work Area Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Business Intelligence Answers (Bl)</td>
<td>Administrators view, edit, and create analytics, as well as custom subject areas in Bl. All subject areas can be viewed when you select the New analysis option.</td>
</tr>
<tr>
<td>Sales Cloud Home Page</td>
<td>This page is the main landing spot for users and administrators and is the springboard for all analytics pages.</td>
</tr>
<tr>
<td>Sales Infolet Page</td>
<td>This page comes prebuilt with infolets specific to sales roles. Once enabled, you can delete existing analyses, and add new analyses for a total of six per page. You can also change the layout of the infolets, shape, size, and so on. The white navigation dots on the home page take you to the Sales Infolet page.</td>
</tr>
</tbody>
</table>
### Overview of Sales Cloud Analytics

<table>
<thead>
<tr>
<th>Work Area Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Pages</td>
<td>These five blank pages are available for you to add whatever analytics you like. The white navigation dots on the home page take you to the Sales Pages.</td>
</tr>
<tr>
<td>Object Pages</td>
<td>On these pages sales users work with opportunities, accounts, contacts, activities and so on. Administrators enable the tabs on these pages and add analyses to the tabs on the side of the page.</td>
</tr>
<tr>
<td>Analytics Page</td>
<td>This page is where sales users search for analytics they have permissions to view and make them favorites. Sales users also see analytics that administrators have configured to show specific to their role.</td>
</tr>
</tbody>
</table>

### Reviewing Prebuilt Analytics

Your application comes with prebuilt analytics designed specifically for the individual roles in your sales organization. The following roles have prebuilt analytics including:

- Sales Representatives - Performance, opportunities, pipeline, leads, and quota analytics
- Sales Managers - Team analytics including activities, leads, performance, opportunities, quota, and performance
- Channel Account Managers - MDF Requests, deal registration, partner status, opportunities, pipeline, partner performance, and quota analytics
- Sales Executive - Team Leads and executive analytics including, actual vs. quota, forecast vs. quota, top open opportunities, sales stage by age, forecasting, performance, and service request
- Channel Sales Manager - MDF requests, open pipeline, stalled opportunities, partner business plan objectives, partner hierarchy analytics.
- Partner Sales Representative - Stalled opportunities and top open opportunities analytics

In addition to the role-specific analytics, there are over general analyses that contain metrics on forecasting, revenue, performance, pipeline, and customers.

You can download a complete list of prebuilt analytics with descriptions and details at: http://www.oracle.com/webfolder/technetwork/docs/reports/r13/Sales-Reports-R13.xls. There is also a link to the spreadsheet in Related Topics.

#### Related Topics

- Sales Cloud analytics listing in downloadable format.
3 Setup and Configuration

Managing Analytics with the BI Administrator Role

The Sales Cloud Administrator is a role that has the permissions to create and manage analytics for end users. Although the Sales Administrator role has many privileges in BI, if administrators or other users want to perform high-level tasks in BI, they must be assigned the BI Administrator duty role by the Security Administrator. BI Administrator tasks include but are not limited to managing the following:

- Catalog Groups
- Privileges
- Sessions
- Publisher Scheduling and Delivery

Assigning the BI Administrator Role

Security Administrators assign the BI Administrator role in the security console.

To assign the BI Administrator role:

1. Sign in as a Security Manager. For example, IT_SECURITY_MANAGER.
2. Click Tools > Security Console
3. Select the Roles tab, if the tab is not already selected by default.
4. Click Create Role.
5. Fill in the required information.
   
   This figure shows the Create Role page for entering basic information.

6. Click Next until you come to the Role Hierarchy page.
7. Click the Plus icon to bring up the Add Role Membership page.
8. Search All for BI Administrator Role.
This figure shows the Add Role Membership page for creating roles.

9. From the search result select BI Administrator Role and click Add Role Membership.
10. Click Next until you get to the Users page.
11. Add all users that must have the BI Administrator role assigned to them. You can assign the BI administrator role to users later as necessary.
12. Click Next.
13. Click Save and Close.

Assigning Additional Users to the BI Administrator Role
Once the BI Administrator role is created, additional users are easily added to this role in the security console.

To add additional users to the BI Administrator role:

1. Sign in as a Security Manager. For example, IT_SECURITY_MANAGER.
2. Click Tools > Security Console
3. Select the Users tab.
4. Search for the user to be assigned the BI Administrator role.
5. Select the user and choose Edit.
6. Click Add Role.
7. Search for the BI Administrator role you created in the steps for Assigning the BI Administrator Role.
8. Click Done.
9. Click Save and Close.

Managing Sales Cloud User Adoption Analytics
Sales Cloud can track and monitor system usage on the application. User activity or user adoption is stored in two new subject areas which can be used to build analytics which provide information about user activity.
To enable the user adoption features administrators must do the following:

- Enable user adoption tracking in Setup and Maintenance
- Assign or be assigned the role of FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSIS_DUTY

New Subject Areas for User Adoption

Two new subject areas are available for building analytics for user adoption:

- **User System Usage**: This subject area provides the key user adoption metric at the application user level.
- **Sales - CRM Resource**: This subject area provides the mapping between the user and the Sales Cloud specific resource object.

Key Metrics for User Adoption Subject Areas

The primary metric that is used in the user adoption subject areas is **# of Active Days**. This metric provides information about an activity such as when a user signed in on a mobile device has used the application for three days without logging out. The # Active Days metric show a value of 1 for each of the three days. The value is not a sign-in count. In addition, the day boundary is based on the Sales Cloud server time zone.

Additional characteristics of the key metrics for user adoption subject areas are the following:

- The retention period for information is set at 12 months.
- Sales Cloud sessions can be tracked for usage channels for web and mobile.
- Tracking differentiates between user activities made directly by the user, or through a proxy user.

Apart from this, there are two additional Metrics which are **# of Active Users/Resource** and **# of Users/Resource**.

**Note**: To ensure that existing reports that you created in R12 work after you upgrade to 18A+, you must apply the **# of Active Days > 0** filter to your analytics.

**Note**: The User System Usage subject area has been designed to show usage for all Time Period and Users/Resources. The functionality is designed this way to allow reporting on time periods where the user has used the system and there have been activities, as well as those months where there were no activities/system usage. For this reason, when a custom report is built that includes a Time Period at either Year or Month, you must restrict the report result by that specific time period, in this case, for the current year. Without this filter, the report shows results for the complete 100 years Time dimension that Oracle Sales Cloud supports. Follow these guidelines for reporting with the User System Usage Subject Area:

- Add a filter for a specific year.
- Avoid reporting by date. Instead use Month or Quarter.
- Consider filtering by group of users, instead of individual users.

For the best performance, Oracle recommends that you apply a filter on the **# of Active Days fact > than 0** to ensure the report shows up with positive reporting values.

Enabling User Adoption

Administrators or implementation users enable the user adoption system tracking process in Setup and Maintenance.
To enable user adoption system tracking:

1. Go to Setup and Maintenance.
2. Search for **Manage Administrator Profile Values**.
3. Search for profile option code **FND_TRACK_USER_ACTIVITY** and ensure that it is enabled.

This figure shows the profile value as "ENABLED" for FND_TRACK_USER_ACTIVITY profile.

### Assigning User System Usage Duty Role

The User System Usage subject area holds all the activity information for all the users of the Oracle Sales Cloud system. This subject area is secured and can be accessed by users who have the role FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSIS_DUTY or by users who have the BI Administrator role.

To assign the User System Usage Duty role:

1. Sign in as a Security Manager. For example, IT_SECURITY_MANAGER.
2. Click **Tools > Security Console**.
3. Select the **Roles** tab, if the tab is not already selected by default.
4. Click **Create Role**.
5. Fill in the required information.
6. Click **Next** until you come to the Role Hierarchy page.
7. Click the role name and then click **Add Role Membership**.
8. Search for the BI Duty Role by name or code: FBI_USER_SYSTEM_USAGE_TRANSACTION_ANALYSIS_DUTY.
This figure shows the Add Role Membership dialog with the new duty role content.

9. From the search result select BI Administrator Role and click **Add Role Membership**.
10. Click **Next** until you get to the Users page.
11. Click **Add User** and search for the users to assign this role. Click **Add user to Role**.
12. Click **Next**.
13. Click **Next** to go to the Summary and Impact Report. Click **Save and Close**.

**Assigning Additional Users**

Once the new role is created, additional users are easily added to this role in the security console.

To add additional users to the BI Administrator role:

1. Sign in as a Security Manager. For example, IT_SECURITY_MANAGER.
2. Click **Tools > Security Console**
3. Select the **Users** tab.
4. Search for the user to be assigned the role.
5. Select the user and choose **Edit**.
6. Click **Add Role**.
7. Search for role you want to assign, in this case the BI System Usage SA Custom Role.
8. Select the Role and click **Add Role Membership**.
This figure shows the search roles, and the Add Role Membership.

9. Click **Done**.
10. Click **Save and Close**.

Understanding Analytics Security and Access

Permissions are authorizations that are granted to a user or role to perform a specific action or group of actions on analytics objects. Permissions are a part of the security model, and how permissions are initially assigned is based on how users, roles, and groups were set up on your application.

The setup administrator has likely assigned you the role of Sales Administrator or the Sales Administrator might have created a sub-role specifically for administering analytics. As the person responsible for administering analytics, your permissions enable you to access all of the analytics work areas. You have access to the BI catalogs, dashboards, and tools to create, edit, and add analytics to your sales team's work areas.

**Related Topics**

- Securing Oracle Sales Cloud
- Role-Based Access Control: Explained
Tools for Administering Analyses and Reports: Explained

You can use several different tools to manage and administer analyses and reports.

These components support modification and administration of your analyses and reports:

- Use the Business Intelligence catalog to interact directly with your reports and analyses. Use this interface to manage permissions, properties, and the organization of your analyses and reports.
- Use the Oracle Business Intelligence Publisher administration pages to configure settings specific to the running and scheduling of operational reports, such as setting up your delivery servers, managing scheduler work load, and setting run-time properties for reports.

Business Intelligence Catalog: Explained

Reports, analyses, dashboards, and other business intelligence (BI) objects are stored and administered in the business intelligence catalog.

Navigating to the Catalog

To navigate to the catalog:

1. Click Tools > Reports and Analytics in the Navigator.
2. In the Reports and Analytics work area, click the Browse Catalog button.

Identifying Objects in the Catalog

The catalog stores the BI objects in a folder structure of individual files, organized by product family.

BI objects and reports are organized in the following folder hierarchy:

- Shared Folders (parent)
- Product family (example: Financials)
- Product (example: Payables)
- Report groups (example: Invoices)
- Dashboard reports
- Data Models
- Report Components
- BI Publisher reports
- Prompts

The following table describes the common BI objects that you find in the catalog:
### Catalog Object

<table>
<thead>
<tr>
<th>Catalog Object</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>Analyses are used primarily by dashboards.</td>
<td>Report Components folder</td>
</tr>
<tr>
<td>Dashboard</td>
<td>Dashboards organize analytical content and catalog objects, and present them in a meaningful way.</td>
<td>Reporting group folder</td>
</tr>
<tr>
<td>Dashboard Prompt</td>
<td>Dashboard prompts allow users to filter dashboard content using provided values.</td>
<td>Prompts folder</td>
</tr>
<tr>
<td>Filter</td>
<td>Filters are used in dashboards and analyses.</td>
<td>Prompts folder</td>
</tr>
<tr>
<td>Report</td>
<td>Reports are operational reports created in Business Intelligence Publisher.</td>
<td>Reporting group folder</td>
</tr>
<tr>
<td>Data Model</td>
<td>Data models are used by reports created in Business Intelligence Publisher.</td>
<td>Data Models folder</td>
</tr>
<tr>
<td>Subtemplate</td>
<td>Subtemplates are used by reports created in Business Intelligence Publisher.</td>
<td>Reporting group folder</td>
</tr>
</tbody>
</table>

### Understanding Responsive Sizing

#### Responsive Sizing for Sales Cloud Analytics: Overview

Responsive sizing ensures that analytics are displayed on your laptop, mobile, or tablet browser in the best possible way. By default, BI allows users to configure the report to fit any particular format they want. However, this technique does not allow the report or chart to be responsive to the user screen resolution.

Enabling responsive sizing for your analytics ensures that when users are viewing an analytic, the analytic size adjusts to the screen size on device they are using. This ensures that users view the analytic in as much of the screen space as possible without distorting the image. Not only does it adjust to maximize the screen display on the device, but it enables a scroll in the cases where the analytic rows extend beyond the screen size.
This figure shows an example of an analytic before responsive sizing is set up.

This figure shows an analytic fully sized to fit the screen in which it is being viewed.

This figure shows a tabular report before responsive sizing is set up.
This figure shows a tabular report after responsive sizing is set up. Note how the report now uses all the available screen space.

This figure shows how with responsive sizing set up, the graph size changes in size to respond to the browser size.
Responsive Sizing Page and Setup Requirements

There is no way to opt into responsive sizing globally. Prebuilt analytics cannot be set for responsive sizing. You must do a few steps to opt in for each analytic you want enabled. To enable responsive sizing for prebuilt analytics, you must make a copy, and enable the copy with the same steps for enabling custom analytics.

If you have multiple BI objects on a page, responsive sizing does not work. In this case, you can embed a dashboard, or layout quadrant, which can then express multiple analytic objects with responsive sizing. For table views, if it has a large number of columns it will scroll.

You must set every analytic that you want to be responsive. This makes the analytic responsive on any device on which users will view it. In addition, in some cases you must configure the page on which the analytic is viewed. The following table shows a summary of the pages and steps for setting responsive sizing on that page.

<table>
<thead>
<tr>
<th>Page Name</th>
<th>Setup Requirements</th>
</tr>
</thead>
</table>
| Object Landing or Object Edit Page tabs | • In BI, set analytic dimensions, and if the analytic is in a dashboard set the dashboard dimensions as well.  
  • Working in a sandbox, edit the container parameter and display options. |
| BI Dashboards                 | • In BI, set analytic dimensions, and if the analytic is in a dashboard set the dashboard dimensions as well.  
  • In BI, set column and container properties so that dashboard container is larger than the analytic container. |
| Sales Pages                   | • In BI, set analytic dimensions, and if the analytic is in a dashboard set the dashboard dimensions as well.  
  • Working in a sandbox, edit the container parameter and display options. |
Setting Responsive Sizing for Sales Cloud Analytics

There are a few steps to enabling an analytic for responsive sizing in BI. When you create or edit the table or chart, and you want responsive sizing, you must provide the view and the container dimensions. The dimensions cannot be blank. The reason you are setting these dimensions is to optimize the analytic for viewing, and to ensure the container is larger than the view canvas when it sizes dynamically to fit the user’s device screen size.

The following are the component levels to set for analytics sizing:

- Level 1 - View container (Set in BI)
- Level 2 - View (Set in BI)

For dashboards, four levels of layout sizing are needed:

- Level 1 - Dashboard container (Set in dashboard)
- Level 2 - Dashboard section (Set in dashboard)
- Level 3 - View container (Set in BI)
- Level 4 - View (Set in BI)
This table shows the sizing specifications for analytic components.

<table>
<thead>
<tr>
<th>Object</th>
<th>Key</th>
<th>Original</th>
<th>Tight Sizing</th>
<th>Loose Sizing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboard Column</td>
<td></td>
<td>880 x 390 (Min Size)</td>
<td>880 x 436</td>
<td>900 x 550</td>
</tr>
<tr>
<td>Top Section</td>
<td>Not set</td>
<td></td>
<td>610 x 55</td>
<td>650 x 80</td>
</tr>
<tr>
<td>Prompt, Link, Link, Link</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>Bottom Section</td>
<td>Not set</td>
<td>845 x 370</td>
<td>880 x 450</td>
<td></td>
</tr>
<tr>
<td>Title Container</td>
<td>Not set</td>
<td>415 x 33</td>
<td>415 x 40</td>
<td></td>
</tr>
<tr>
<td>Title</td>
<td>n/a</td>
<td>410 x 28</td>
<td>240 x 40</td>
<td></td>
</tr>
<tr>
<td>Table Container</td>
<td>Not set</td>
<td>415 x 33</td>
<td>415 x 40</td>
<td></td>
</tr>
<tr>
<td>Table: not specifiable</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
<td>n/a</td>
</tr>
<tr>
<td>View Container</td>
<td>Not set</td>
<td>835 x 306</td>
<td>850 x 320</td>
<td></td>
</tr>
<tr>
<td>Graph</td>
<td>#FFFFFF</td>
<td>830 x 265</td>
<td>830 x 280</td>
<td></td>
</tr>
<tr>
<td>List (Table)</td>
<td>#FFFFFF</td>
<td>850 x 222</td>
<td>850 x 222</td>
<td>850 x 222</td>
</tr>
</tbody>
</table>

This table shows the browser size and the related container size.

<table>
<thead>
<tr>
<th>Browser (variable sizes)</th>
<th>Content container (fixed sized)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1094 x 939</td>
<td>933 x 737</td>
</tr>
<tr>
<td>1302 x 939</td>
<td>1192 x 737</td>
</tr>
<tr>
<td>1468 x 939</td>
<td>1350 x 737</td>
</tr>
<tr>
<td>1790 x 939</td>
<td>1509 x 737</td>
</tr>
</tbody>
</table>

**Setting Analytic View Dimensions**

To set up the analytic for responsive sizing go to BI, open the analytic and set the view dimension.

**To set the analytic view properties:**

1. In the results view of your analytic, click View Properties.
This figure shows the View Properties selection for an analytic.

2. Choose the General tab.
3. Set the height, and width of the analytic canvas. You must define the size of the analytic to fit the size you have available in the container that holds the analytic. It doesn’t matter which device your users use to view the analytic, as long as you have set the size of the analytic in your window in BI to maximize the space available in the container. Setting the height and width ensures that the view of this analytic is responsive on all devices. The default is no defined size and you must define a size for responsive sizing to be set for that analytic.

This figure shows the General tab for graph properties, and the canvas width and height options.

Setting Analytic View Container Dimensions

To set analytic container dimensions:

1. In the results view of your analytic click Format Container.
2. Adjust the sizing to make sure that the container is larger than the canvas. In this case, since we previously set canvas size to 830 and 265, we set the container to a larger size at 835 and 270. Note that if you also add title containers, the size will need to match the size you have set for the analytic container.

This figure shows the Width and Height options for the Format Container dialog.

Setting the Dashboard Container Dimensions
If your analytic is in a dashboard you must set the dashboard for responsive sizing. For BI dashboards that hold analytics you must set each container component on a dashboard to be responsive.

Set the properties for width and height for the container components so that they are larger than the properties set for your analytic. In this case, since we previously set our analytic container to 830 and 265, we set our dashboard container to a size larger than the dimensions set for the analytic container.

To set the dashboard container dimensions:

- Select the container. Click Column Properties.
This figure shows the Column Properties option for a dashboard container.

• Select the column. Click **Format Section**.

This figure shows the Format Section option for a container in a dashboard.

This figure shows the Height and Width options for Column Properties of a dashboard.
Working with Compound View and View Editors

Compound views are another consideration for setting up responsive sizing.
This figure shows the edit container option.

This figure shows options for setting the text properties in the fields. Set title cell properties using the A icon to the right of the field.
In the Cell property dialog set the vertical alignment to Center to set the title to float vertically in the resized container. This setting is recommended.

For tables, set the following:

- Select "Fixed headers with scrolling content" to add sizing values.
- Set Vertical Alignment = "Center" in the Table’s view container if you want the table to float vertically in the middle of the resized container.

This figure shows a table, with the option to edit the table view container properties.

For pivot tables select *Fixed headers with scrolling content* to add sizing values.

This figure shows a pivot table with the option to edit the pivot table view container properties.
Setting Responsive Sizing on Sales Cloud Interface Pages

Analytics and the dashboards and the interface pages that hold the analytics and dashboards all must have the sizing set for responsive sizing to work.

Setting the Analytics Tabs on Interface Pages

Once your analytic is set with the proper sizing requirements, the next step is to add the analytic to your interface and set the layout specifications for responsive sizing.

1. Add the analytic to the object tab.
2. Open a sandbox.
3. Under Setting and Actions choose **Customize Pages**.
4. In the Customize Pages dialog, select internal.
5. Click **OK**.
6. Navigate to the page you are setting up.
7. Click **Change Layout**.
8. Navigate to the analytic and click Add.
9. Click **Edit**.

This figure shows the edit option for a dashboard container.

10. Under the Parameters tab, change the sizing to "content" and remove any height and width values so that the field is empty.
This figure shows the Height and Width options as well as the Sizing option.

11. Click the Display Options tab.
12. Click the Advanced tab.
13. Under Stretch Content, set the value to “false”.

Recommendations and Specifications

Traditional BI Content typically does not have all these sizes specified. The following are some recommendations for getting the best sizing results.

- **Use original content as a guide and size from the inside out.** Start adding sizes for views first. Follow this by adding sizes to view containers. Save the report then make adjustments to Dashboard Sections, and then Dashboard Columns. When tweaking dashboard containers, set their size to the specific size then tweak to minimize scroll bars.

  An inspector tool like Firebug can make this process much easier by allowing temporary edits in place. You can then go back and add the values in the dialog. Add 20 pixels to dashboard container heights as this gets deducted by the dashboard code (presumably to reserve space for the collapsible icon).

  When you are done tweaking, set the dashboard, columns, and sections to the minimum size setting. This setting removes the overflow behavior and prevents scroll bars from appearing on BI content.

  For analytics, two levels of layout sizing are needed:

- **Measure pixels in original content to obtain starting size values.** Use a pixel measuring tool (like Measure or others) to measure pixels on the screen to find starting sizes for views. Similarly, measure pixels on the screen to help figure how many pixels to add or deduct for components that cannot be resized within views. For example, the View Selector widget needs approximately 40 pixel height.

- **Build in padding sizes.** BI styles typically have some padding built in to their CSS. The BI resizing code works best when taking this into account. Moving from sections to columns, try adding 3 pixels per border. For example, if you have two sections in a single dashboard column, they contribute four borders. So make the column value 12 pixels larger than the sum of the sections. When working up from views to view containers, try adding the same 3
pixels per border. Note that the 3 pixel padding recommendation is suitable for the Alta style. Custom styles may need more or less padding to be built into the math. You can validate the dashboard behavior using the specific size setting. In general, more padding is safer but could contribute marginally to less predictable behavior.

- **Make sure the math works out.** BI builds up the sizing map based on nested layout objects. Resizing falls apart if any parent container size is sized smaller than the content that it contains. For example, if a graph size is 300 x 200 and its view container is 350 x 250, then section and column containers must be larger than 350 x 250. If the section were set to 300 x 200, for instance, resizing would not work.

This figure shows a dashboard with an analysis that has a compound layout with titles and two views to choose from. Colors have been added to highlight the various layout components.

---

**Setting Up Currency**

**Setting Currency Preferences for Analytics: Overview**

Oracle Transactional Business Intelligence gives you the ability to set your personal currency preferences, as well as set currency preferences which determine how your analyses display currency and calculate exchange rates.

The user preferences for your cloud offering are set in the cloud environment, and the currency preferences for analyses are set in Oracle Business Intelligence (BI). Both user preferences impact how your report currency is calculated and displayed. Your application administrator sets the corporate currency as the common currency basis for all users.

There are three ways currency is set in cloud and BI environments:

- **User Currency** - Set by the business user in Regional settings. This setting applies to the entire application interface for that user only. The currency options available are set by your application administrator.
• **Reports Currency** - Set by the business user in BI in My Account settings in the Reports area. The setting applies to that user only and only relevant for report production.

• **Corporate Currency** - Set by the application administrator. This setting applies to all users in that company.

### Setting Your General User Currency: Explained

User currency settings govern the currency that is used as the default for your application interface. User currency is set in the application and applies to your entire interface for your signed-in session.

To set your user currency:

1. Navigate to **Tools, Set Preferences**.
2. Select **General Preferences > Regional**.
3. Select the preferred currency to be used. Available currencies include those set up for your company by your application administrator.

### Setting Your Personal Analysis Currency

The analysis currency determines the currency that is used in reports and analyses. It also determines how and when your currency conversion rates are calculated.

To set your currency for reports and analyses:

1. Navigate to **Business Intelligence**.
2. Click **Analytics** in the navigator menu.
3. Click **Browse Catalog**.
4. Click your user name and and select **My Account**.
5. Go to the **Preference**.
6. Select your choice in **Currency**.

The following table describes the currency menu options.

<table>
<thead>
<tr>
<th>Currency Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Entered Currency</strong></td>
<td>Currency used on a transaction.</td>
</tr>
<tr>
<td><strong>&lt;Application&gt; Currency</strong></td>
<td>Currency set up in each respective Cloud application as the common Corporate currency used company-wide.</td>
</tr>
<tr>
<td><strong>User Preferred Currency using Simple Currency Management</strong></td>
<td>Conversion to User Preferred Currency is performed at the time your run the report, and is calculated from the Corporate currency based on the last time the record was updated and saved or closed.</td>
</tr>
<tr>
<td><strong>User Preferred Currency using Advanced Currency Management</strong></td>
<td>Conversion to User Preferred Currency happens on the date you run the report, and uses the currency indicated on the record.</td>
</tr>
</tbody>
</table>
Setting a Default Currency Conversion Option for All Users: Explained

The default setting for the way currency conversion is handled for analytics is the User Preferred Currency Using Simple Currency Management. This simple currency management setting provides the best run-time performance when dealing with currency exchange rate management. But there are cases when your organization might want to standardize the setting for all system users, by setting the default preference to another option, such as CRM Currency or User Preferred Currency Using Advanced Currency Management.

To change the default currency setting for all users, administrators need to add a profile option and a corresponding value. Note that when administrators change the default currency setting for users in their organization, individual users can still override that setting and select their preferred currency in My Account.

The following table shows the profile option code parameters to override the default currency setting.

<table>
<thead>
<tr>
<th>Profile Code</th>
<th>Profile Value Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI_DEFAULT_CURRENCY_CONVERSION_METHOD</td>
<td>CRM Currency - Defaults to Application Currency.</td>
</tr>
<tr>
<td>BI_DEFAULT_CURRENCY_CONVERSION_METHOD</td>
<td>User Preferred Currency 1 - Defaults to User Preferred Currency Simple Currency Management.</td>
</tr>
<tr>
<td>BI_DEFAULT_CURRENCY_CONVERSION_METHOD</td>
<td>User Preferred Currency 2 - Defaults to User Preferred Currency Advanced Currency Management.</td>
</tr>
</tbody>
</table>

Adding a Currency Profile: Explained

To set default global currency conversion types for all users, administrators create a currency profile. Currency profiles are added in Setup and Maintenance, one of the options available when you click your user name in the Home Page. Only administrators can change global currency preferences by creating profiles.

To Add a currency profile:

1. Go to Setup and Maintenance.
2. Search for Manage Profile Options.
3. Click the + (New icon) in Search Results: Profile Options.
4. Enter the following values:
   - **Profile Option Code**: BI_DEFAULT_CURRENCY_CONVERSION_METHOD
   - **Profile Display Name**: BI Default Currency Conversion Method
   - Application
   - Module
   - **Start Date**: Provide previous day’s date to proceed to next step to define values.
5. Click Save and Close.
6. In the Manage Profile Options dialog, you see your new profile. Check the Enabled box for Site.
7. Click Save and Close.
Defining Currency Profile Values: Explained

Once you have created your currency profile, the last step is to define the profile value. This step defines which currency management option is assigned to that profile.

To define a currency profile value:

1. Go to Setup and Maintenance.
2. Search for "Manage Administrator Profile Values".
3. Click Manage Administrator Profile Values.
4. In Profile Option Code search for your profile: BI_DEFAULT_USER_CURRENCY
5. In Manage Administrator Profile Values, Click + (Add icon) .
6. Select Site as the Profile level.
7. Enter "User Preferred Currency 2" in Profile Value.
8. Click Save and Close to close the dialog.

User-Preferred Currency Reporting and Exchange Rates: Points to Consider

The simple and advanced user-preferred currency choices determine how and when your currency exchange rates are calculated for your reports. For both simple and advanced currency management, when you save or close a report, the application sets the exchange rate at that time. The option you choose impacts how quickly your reports are generated at run time. Each case includes trade-offs, as detailed in the examples.

User Preferred Currency using Simple Currency Management

The advantage of this option is performance - the application doesn't have to look up the rate for each transaction because when you close or save a record, the application converts it to your corporate currency at that day's rate. When you run the opportunity report, the application multiplies that value by your preferred currency exchange rate for the date you run the report. This eliminates the need for the application to cycle through each record, and calculate the corresponding exchange rate to your preferred exchange rate at the time that record was closed or last saved. It simply takes the value on record for the original transaction exchange to corporate currency, and multiplies it by your preferred currency exchange rate at the time your run the report.

As an example of user preferred currency using simple currency management, a user updates and saves or closes an opportunity record with associated revenue of one million Indian Rupees on January 31st with an exchange rate of 0.01403 Rupees to one US Dollar. The user then runs an opportunity report in US Dollars on March 31st. In the report, the US Dollar Corporate Currency is set at the January 31st rate it was saved at, in this case reporting as $14,030, or one million multiplied by 0.01403. Finally, an opportunity report on March 31st in Euros uses the March 31st conversion rate for US Dollars to Euros of 0.75017 to convert the recorded US Dollar amount into Euros, in this example one million multiplied by 0.1403, which is the January 31st Rupee to US Dollar exchange rate, multiplied by 0.75013, which is the March 31st rate for Euros. This requires less processing, because the January 31st Rupee to US Dollar exchange rate, while not exact on March 31st, is used as the basis for the calculation of the March 31st opportunity revenue conversion to Euros at the later exchange rate.
The following figure describes an example of user preferred currency using simple currency management.

### Example of User Preferred Currency using Simple Currency Management:

**User updates and saves or closes record on January 31st**

*Opportunity Currency in INR = 1M*

Jan 31st, 2014 exchange rate: INR to USD = 0.01403

**User runs opportunity report on March 31st**

*Corporate Currency in USD is set at the Jan 31st 1M INR converted to USD at the exchange rate when closed or saved, in this case x 0.01403 = $14030*

**Opportunity report on March 31st shows all opportunities in EUR**

*User Preferred Currency in EUR is shown in report as March 31st 2014 rate USD to EUR at March 31 rate 0.75017 = EUR 10517 (1M x 0.1403 x 0.75017)*

### User Preferred Currency using Advanced Currency Management

This option provides a more precise exchange rate, since it goes through each record to determine the rate on the date the record was updated or closed. The downside of this option is performance. Your reports will take longer to run. The application has to cycle through each record and match currency exchange rates to the date the record was closed or updated and saved.

As an example of user preferred currency using advanced currency management, a user updates and saves or closes an opportunity record with associated revenue of one million Indian Rupees on January 31st, when an exchange rate of 0.01050 Rupees to one Euro applies. The user then runs an opportunity report on March 31st. In the report, the User Preferred Currency of Euros is applied, using the March 31st Rupee to Euro rate of 0.01052, requiring calculation during report processing to resolve the opportunity to 10,520 Euros. Finally, an opportunity report on March 31st in Euros again uses the March 31st conversion rate for Euros.
The following figure describes an example of user preferred currency using advanced currency management.

**Example of User Preferred Currency using Advanced Currency Management:**

User updates and saves or closes record on January 31st

User runs opportunity report on March 31st

Opportunity report on March 31st shows all opportunities in EUR

Opportunity Currency in INR = 1M
Jan 31st, 2014

User Preferred Currency is EUR. Exchange rate for INR to EUR on March 31st is 0.01052 = EUR 10520

User Preferred Currency in EUR is shown in report as EUR 10520

**Exchange Rates**
- Jan 31st, 2014: INR -> EUR = 0.75041
- Jan 31st, 2014: INR -> USD = 0.01052
- Jan 31st, 2014: INR -> USD = 0.01401

**Why do I see amounts of zero in analyses?**

The currency exchange rates might not be set up correctly. For example, you choose EUR as your preferred currency in general preferences, and your corporate currency is USD. Amounts in analyses are displayed in EUR after conversion from USD, based on the current exchange rate. But if the exchange rate between EUR and USD isn’t set up, or if the conversion fails for any reason, then the amounts show as zero. If this happens, contact your help desk.

**Scheduling Snapshots of Your Sales Historical Pipeline**

Use the **Generates Sales Historical Snapshots** scheduling process to get daily snapshots of your sales pipeline. This feature helps you stay informed about your pipeline opportunity and revenue trends over time, so you can keep your eye on your bottom line.

Snapshots are only supported if the enterprise calendar is configured to be either a Monthly or Weekly based calendar. No other calendar period frequencies are supported. Set up enterprise calendar before using snapshots.

The Generates Sales Historical Snapshots feature uses the **Sales - CRM Historical Pipeline** subject area to cull information on your key pipeline data. For more information on sales subject areas see Chapter 3, “Building Analytics with Business Intelligence.”
Managing Your Sales Historical Snapshot

The Generates Sales Historical Snapshots scheduled process captures opportunity and revenue snapshots for open opportunities and opportunities closed within the time period you specify. You can set up a snapshot to run once, or set it up to run daily, weekly, monthly, yearly, or on your own time frame. You can also choose the number of days after which opportunities have been closed to continue to take a snapshot of the opportunity and its corresponding revenue information.

To configure your Sales Historical Snapshots scheduled process:

1. Navigate to Setup and Maintenance, All Tasks.
2. Under Name, search for Manage Opportunity Profile Options.
   
   The search results returns the Manage Opportunity Profile Option in the bottom of the window.
3. Click Go to Task on the row that holds the Manage Opportunity Profile Options search result. The Manage Opportunity Profile Options page appears.
4. Under Profile Option Code, enter MOO_MANAGE_SALES_HISTORICAL_SNAPSHOT_CONFIGURATION. Search for that profile.
5. Under Profile Values on the right ensure that the value are C=120, D=120, W=58, M=14, Q=5.

The Profile Values are defined the following ways:

- C is number of create snapshots for closed opportunities closed within the last C days. This value must be greater than zero.
- D is number of days to retain daily snapshots. This value must be greater than zero.
- W is number of weeks to retain weekly snapshots if the enterprise calendar is a week based calendar.
- M is number of months to retain monthly snapshots if the enterprise calendar is a month based calendar.
- Q is number of quarters to retain a quarterly snapshot.

**Note:** An upper limit of 10M snapshot records (opportunity and revenue records combined) is supported and once the record limit is reached, the snapshot process automatically purges records by oldest snapshot date until the record count is brought under the limit. The snapshot process only supports capturing snapshots if the enterprise calendar is configured to be either a Month or Week based calendar. No other calendar period frequencies are supported. To use the snapshot feature you must configure your calendar first.

Scheduling Your Sales Historical Snapshots

You can schedule your Sales Historical Snapshots processes either from the SUI, or from the desktop UI.

To schedule your sales historical snapshots processes:

1. From the menu options choose More then Scheduled Processes.
2. Click the Schedule New Process tab.
This figure shows the Schedule New Process option from the Scheduled Process window.

3. If you haven’t already run this process, in which case it will show under the search results on the Scheduled Processes starting page, then you will search in the Scheduled New Process dialog. Click to view all of the choices. At the bottom there is a Search option. Click Search and enter Generates Sales Historical Snapshots. In Search Results highlight Generates Sales Historical Snapshots and click OK. The Schedule New Process dialog appears. Click OK again.
This figure shows the Search and Select dialog for choosing your Generate Sales Historical Snapshots process.

4. In the Process Detail dialog click the **Advanced** tab. Here you are going to set when you want your process to run, that is, daily, weekly, or monthly, and so on. You will also set the start and end date.

This figure shows the scheduling options for your Sales Historical Snapshots processes.
5. Click the **Notification** tab and define whom you want to be notified if the process run is successful, if it generates an error, or if there are warnings.

6. When you are finished with your scheduling process details for times, frequency, and notifications, click **Submit**. Your Generate Sales Historical Snapshot is now completed.
Printing, Sharing, and Scheduling Analytics

Printing and Sharing Analytics: Overview

Printing Analytics

There might be times when you want to publish analytics that are highly formatted. For example, you may need to share or print analytics that display opportunities and their open revenue, with additional information about sales stages, customers, products, and so on. You can do this by publishing to a variety of formats which make it easy to print and share your analytics.

Sharing Reports and Analytics

Analytics can be shared in different ways as this table details.

<table>
<thead>
<tr>
<th>Method or Tool</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export and share</td>
<td>You can export analytics in a variety of formats, such as Microsoft Excel or PowerPoint, PDF, .csv, and web archive. After you have exported and saved the reports to your hard drive, you can easily attach them to an e-mail or upload to a web site.</td>
</tr>
<tr>
<td>Briefing books</td>
<td>A briefing book is a collection of analyses or dashboard pages (which can contain reports). The static snapshots give you a picture of what’s going on at the time that the analysis or dashboard page is added to the briefing book. You can create new briefing books and update existing ones.</td>
</tr>
<tr>
<td>Agent</td>
<td>An agent is an action that you set up to deliver a scheduled report or analysis and then define who receives it and the delivery method for it.</td>
</tr>
</tbody>
</table>

Note: Your access to these options for sharing analytics and reports depend upon your permissions within the application.

Creating Briefing Books: Procedure

A briefing book is a collection of updatable or static analyses or dashboard pages (which can contain reports). The static snapshots give you a picture of what’s going on at the time that the analysis or dashboard page is added to the briefing book. You can download briefing books as PDF or MHTML for viewing or printing, and share them with others. The PDF file
includes a table of contents for the book. Like analytics and reports, briefing books are stored in the business intelligence (BI) catalog.

Adding Content to New Briefing Books

Follow these steps:

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click the Browse Catalog button.
3. Select your analysis, then click More and select Add to Briefing Book.
   Or, find your dashboard and click Open.
   a. Go to the dashboard page you want to add.
   b. Click the Page Options button and select Add to Briefing Book.
4. Indicate if you want the analysis or dashboard results to change (Updatable) or not (Snapshot) whenever the briefing book is downloaded or rerun.
5. Click Browse.

Adding Content to Existing Briefing Books

Follow these steps:

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click Browse Catalog.
3. Select your analysis, then click More and select Add to Briefing Book.
   Or, find your dashboard and click Open.
   a. Go to the dashboard page you want to add.
   b. Click the Page Options button and select Add to Briefing Book.
4. Indicate if you want the analysis or dashboard results to change (Updatable) or not (Snapshot) whenever the briefing book is downloaded or rerun.

Downloading and Editing Briefing Books

Follow these steps:

1. Open the Reports and Analytics work area, or the Reports and Analytics pane if available in other work areas.
2. Click Browse Catalog to locate your briefing book.
   You can find briefing books only in the BI catalog.

Related Topics
- Reports and Analytics Work Area and Panel Tab: Explained

Scheduling Analytics and Briefing Books: Procedure

Analytics and briefing books can run based on a schedule that you define. You can set up other automated tasks, for example, to deliver results to specific recipients or send notifications.
You create what’s called an agent to set this all up for an analysis, dashboard, or briefing book. The agent itself is saved as an object in the business intelligence (BI) catalog.

Creating an Agent

Use the following procedure to create an agent.

1. Open the Reports and Analytics pane in any work area.
2. Click the **Browse Catalog** icon.
3. Click the **Create** icon then click **Agent** under the Actionable Intelligence category.
4. Define criteria for the agent using the appropriate tabs, including the Delivery Content tab to specify the analysis, dashboard, or briefing book to run.
5. Save the agent in My Folders.

> **Note:** To edit an agent, repeat steps 1 and 2 and find the agent in the BI catalog.

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To configure your **Sales Historical Snapshots** scheduled process:

1. Navigate to **Setup and Maintenance, All Tasks**.
2. Under **Name**, search for **Manage Opportunity Profile Options**. The search results returns the Manage Opportunity Profile Option in the bottom of the window.
3. Click **Go to Task** on the row that holds the Manage Opportunity Profile Options search result. The Manage Opportunity Profile Options page appears.
4. Under **Profile Option Code**, enter **MOO_MANAGE_SALES_HISTORICAL_SNAPSHOT_CONFIGURATION**. Search for that profile.
5. Under **Profile Values** on the right ensure that the value are **C=120, D=120, W=58, M=14, Q=5**. The Profile Values are defined the following ways:
   - **C** is number of create snapshots for closed opportunities closed within the last C days. This value must be greater than zero.
D is number of days to retain daily snapshots. This value must be greater than zero.

W is number of weeks to retain weekly snapshots if the enterprise calendar is a week based calendar.

M is number of months to retain monthly snapshots if the enterprise calendar is a month based calendar.

Q is number of quarters to retain a quarterly snapshot.

Note: An upper limit of 10M snapshot records (opportunity and revenue records combined) is supported and once the record limit is reached, the snapshot process automatically purges records by oldest snapshot date until the record count is brought under the limit. The snapshot process only supports capturing snapshots if the enterprise calendar is configured to be either a Month or Week based calendar. No other calendar period frequencies are supported. To use the snapshot feature you must configure your calendar first.

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2. Click the Schedule New Process tab.

This figure shows the Schedule New Process option from the Scheduled Process window.

3. If you haven’t already run this process, in which case it will show under the search results on the Scheduled Processes starting page, then you will search in the Scheduled New Process dialog. Click to view all of the choices. At the bottom there is a Search option. Click Search and enter Generates Sales Historical Snapshots. In Search Results highlight Generates Sales Historical Snapshots and click OK. The Schedule New Process dialog appears. Click OK again.
This figure shows the Search and Select dialog for choosing your Generate Sales Historical Snapshots process.

4. In the Process Detail dialog click the **Advanced** tab.
   Here you are going to set when you want your process to run, that is, daily, weekly, or monthly, and so on. You will also set the start and end date.

This figure shows the scheduling options for your Sales Historical Snapshots processes.
5. Click the **Notification** tab and define whom you want to be notified if the process run is successful, if it generates an error, or if there are warnings.

6. When you are finished with your scheduling process details for times, frequency, and notifications, click **Submit**. Your Generate Sales Historical Snapshot is now completed.

### Setting Reports Up to Run as Scheduled Processes: Points to Consider

You can create a job definition for predefined or custom reports so that users can run them as scheduled processes. Use the Define Custom Enterprise Scheduler Jobs task in the Setup and Maintenance work area to create job definitions. Otherwise, users can open reports (which are set up to be run online) through the Reports and Analytics pane, or open and schedule them from the business intelligence catalog.

### General Job Definition Information

This table describes the general information to enter for your job definition.

<table>
<thead>
<tr>
<th>Field</th>
<th>What You Enter</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Type</td>
<td>BiPJobType</td>
</tr>
<tr>
<td>Report ID</td>
<td>The path to the report in the catalog, starting with the folder beneath Shared Folders, for example: Custom/ &lt;Family Name&gt;/ &lt;Product Name&gt;/ &lt;Report File Name&gt;.xdo. Make sure to include the .xdo extension for the report definition.</td>
</tr>
<tr>
<td>Default Output</td>
<td>A default output format.</td>
</tr>
</tbody>
</table>

### Parameters

You can define parameters to be available to users when they submit scheduled processes based on your job definition. When users run the scheduled process, the values they enter for the parameters:

- Are passed to the data model that the report is using.
- Determine the data to be included in the report.

The parameters that you define must be in the same order as parameters in the data model. For example, the data model has parameters in this order:

- P_START_DATE
- P_END_DATE
- P_CURRENCY

You create parameters as follows:

- Start Date
- End Date
• Currency

Note: Because you define parameters using the list of values sources from the Define Custom Enterprise Scheduler Jobs task, you should not define lists of values in the data model.

User Property

The only user property you must define is `EXT_PortletContainerWebModule`. Only lists of values associated with the application that you select are made available for parameters in this job definition.

Related Topics

• Modifying Data Models: Procedure
• Creating Reports: Procedure

Setting Reports Up for Scheduling: Procedure

You can set up reports as scheduled processes, which means users can submit them from the Scheduled Processes and other work areas. If you want users to also submit these scheduled processes from the Reports and Analytics work area and panel tab, then you must configure properties for the corresponding reports.

Enabling a Report for Scheduling

To enable scheduling in the Reports and Analytics work area and panel tab:

1. In the Reports and Analytics work area or panel tab, edit the report in the business intelligence catalog.
2. Click Properties.
3. On the General tab in the Properties dialog box, enter the following fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enterprise Scheduler Job Package Name</td>
<td>The path for the job definition, for example: / oracle/ apps/ ess/&lt;product family&gt;/ &lt;product&gt;/ &lt;business area&gt;/ Jobs</td>
</tr>
<tr>
<td>Enterprise Scheduler Job Definition Name</td>
<td>The job definition name (not display name), for example: ABCDEFG</td>
</tr>
</tbody>
</table>

Related Topics

• Setting Up the Reports and Analytics Panel Tab: Procedure
• Accessing Report Components to Modify: Points to Consider
Scheduling Analytics for Distribution

Analyses can run based on a schedule that you define. You can set up other automated tasks, for example to deliver results to specific recipients or send notifications.

You submit analyses with the schedule and criteria for other automated tasks defined. Some reports are set up as scheduled processes, in which case you submit the process as you would any scheduled process.

Submitting Analyses as Scheduled Processes

Use the following procedure to schedule an analysis:

1. Open the Reports and Analytics pane in any work area where the analysis is available.
2. Navigate to the analysis within the folders.
3. Click the name of the analysis.
4. Open the More link to navigate to the business intelligence (BI) catalog.
5. In the More menu, click Schedule to set the analysis up as a scheduled process.
6. In the Agent window, define criteria for the agent using the appropriate tabs, including entering a schedule.

**Note:** For analyses set up as scheduled processes, you can also:

- Schedule them from any work area where there is a link to the analysis.
- Use the Navigator to open the Scheduled Processes work area, where you can submit all processes that you have access to.

You can also schedule analyses from the Reports and Analytics work area that you access using the Navigator.
Managing Analytics Folders

Understanding BI Catalog Folders

All of the prebuilt analytics are stored in BI under Shared Folders in the Sales folder. Under Sales there are three folders:

- Subject Area Contents - holds data related to subject areas.
- Analytics Library/Embedded Content - holds embedded content. General content that is used for generic analytics that are not role-specific.
- Embedded Content - holds role-specific analytics used for infolets and sales pages.

Store the analytics you build in My Folders, at the same level as Shared Folders.

Saving Analytics and Reports: Points to Consider

You save analyses, dashboards, and reports in the business intelligence (BI) catalog, along with other objects, including prompts and filters. The catalog has a hierarchy of folders, starting with My Folders and Shared Folders. One important folder is Custom, which you find under Shared Folders and use to store your modified analytics and reports.

My Folders

You're the only one who can access anything that you save in My Folders. You can see your saved items in My Folders on the Reports and Analytics work area, but not in My Folders in the Reports and Analytics panel tab on any other work area. The only exception is when you create an analysis using the wizard in the Reports and Analytics work area, and save it in My Folders. In this case, the analysis is available in any panel tab on all work areas.

Shared Folders

If you have the appropriate roles, you can also save in Shared Folders so that your modified analytics or reports are available to anyone with the right access. You should save objects under the Custom subfolder, which has subfolders organized by product family.

Regarding predefined analytics and reports in Shared Folders:

- You should save a copy of the predefined analysis or dashboard in the corresponding product family subfolder under the Custom folder, and edit only the copy. Directly edit predefined analytics only when necessary, to make sure that any references to the analysis or dashboard still work properly.
- For predefined reports only, you can use a special Customize option to copy the report and also the folder structure and permissions. The copy is linked to the original, so editing the copy is like directly editing the original.
Custom Folder

Keep all modified analytics and reports in the Custom folder so that:

- You ensure that modified copies of those objects are not affected during upgrades, which can change predefined analytics and reports outside the Custom folder. You might lose changes saved outside the Custom folder during upgrades.
- You can easily find modified objects.
- You can edit objects in the Custom folder without compromising security on the original objects.

When you copy an object into the Custom folder, the copied object inherits the permission settings of the Custom folder. An administrator can reset the permissions on the object and the folder that it’s in.

Related Topics

- Reports and Analytics Work Area and Panel Tab: Explained
- Creating and Editing Reports: Explained
- Creating and Editing Analytics: Highlights
- Using the Customize Option for Predefined Reports: Points to Consider

Creating Folders: Procedure

You manage analyses and reports in the business intelligence catalog, where you create folders to organize them.

Creating Folders

Follow these steps:

1. In the catalog, navigate to the desired location of the new folder in the Folders pane.
2. In the catalog toolbar, click New, and select Folder.
3. In the New Folder dialog box, enter the folder name, and click OK.

Addressing Automatically Created Folders

If conflicts are detected during upgrade, folders named backup_nnn are automatically created in the catalog. After reviewing and resolving any conflicts, Oracle recommends that you manually delete the backup folders from the catalog. You can contact your help desk to request an automated removal if you have a large number of folders to delete.

Setting Folder Permissions and Attributes: Procedure

Business intelligence catalog folder properties control folder permissions and other attributes. You can access the properties of any object or folder in the catalog to perform tasks such as viewing system information or changing attributes or ownership. All other users can only access and modify the properties of the objects that they create or own.
Setting Folder Properties

Follow these steps:

1. In the catalog, select the folder you want to assign properties to.
2. In the Tasks pane, click Properties.
3. In the Properties dialog box, select any of the options in the Attributes section:
   - Hidden: Specifies that the object is hidden.
   - System: Specifies that the object is a system object.
   - Read Only: Specifies that the object is read-only.
   - Do Not Index: Excludes the object from the index used by the full-text catalog search. Excluded objects do not display in the results of any full-text catalog search; the object can still be found using the basic catalog search.
4. Use the Ownership section to take ownership of a folder or object in the catalog. This area displays only if the proper privileges were assigned to the user, group, or role. Note that the owner of an object or folder can’t automatically access the object or folder.
   - Set ownership of this item: Click to become the owner of the folder or object.
   - Set ownership of this item and all sub items: Click to become the owner of the folder and any sub folders or sub items contained within the item. For example, if you click this link for a dashboard folder, then you take ownership of all of the dashboard’s components.

Setting Folder Permissions: Procedure

You can assign permissions on folders and other objects.

Accessing and Setting Permissions

You can set permissions or change ownership for any catalog object or folder. Nonadministrative users can access and modify the permissions of the objects that they create or own.

To set folder permissions:

1. In the catalog, select the folder or object.
2. In the Tasks pane click Permissions.
3. In the Permissions dialog box, the owner and any other users, roles, or groups with permissions are listed in the Permissions list. To add a user or role, click Add users/roles in the toolbar and search for users or roles to add them to the Selected Members list in the Add Application Roles, Catalog Groups and Users dialog box. To delete a user or role, select the account or role in the Permissions list and click Delete selected users/roles.
4. In the Permissions list, to set ownership for a user, select Custom in the Permissions drop-down list for the account, then select Set Ownership in the Custom Permissions dialog box and click OK. You can also select the Owner option for the user or role.
5. Use the Permissions drop-down list to set permissions for the object. Object permissions vary by object.
6. Use the Apply permissions to sub-folders option to assign permissions to the folder’s subfolders, and the Apply permissions to items within a folder to assign them to objects in the folder but not to subfolders.
Moving Analyses and Reports: Procedure

You can archive to bundle the entire catalog, specific folders, or multi component objects as a .catalog file and upload the .catalog file to unarchive the data to another location in the catalog. Use the archive process to transfer specific data across environments, for example from a development environment to a production environment.

Creating an Archive

To create an archive file:

1. Locate the object in the catalog.
2. Select More and then select Archive.
3. In the Archive dialog box, select one or more of the following options:
   - Keep Permissions: Maintain the object or folder’s existing permissions. If you do not select this option, then the archiving process does not include any permissions. Upon unarchiving, the parent folder’s permissions are assigned to all of the objects and folders.
   - Keep Time stamps: Maintain the Creation Time, Last Modified, and Last Accessed times assigned to the object or folder. Upon unarchiving, the LastModified time is updated to indicate the time at which the object or folder is unarchived. If you select this option, the Old option in the Paste Overview area of the Preferences dialog box is available when unarchiving. You use the Old option to overwrite existing catalog items that are older than the catalog items in the archive.
     - If you do not select this option, then the archiving process does not include time information and the Old option in the Paste Overview area of the Preferences dialog box is not available.
4. Click OK to download the archive file.

Moving a File to a New Location

To unarchive a file:

1. Select the folder in the catalog where you want to upload the archived file.
2. In the Tasks pane click Unarchive.
3. In the Unarchive dialog box, browse for and select the archive file.
4. Use the Replace option to specify whether to replace an existing folder or object with the same name.
   - All: Select this option to replace any existing folders or objects with the same names as folders or objects included in the archive file that you are uploading.
   - Old: Select this option to replace folders or objects except those folders or objects that exist, unless they are older than the source.
   - None: Select this option to add any new folders or objects, but preserve any existing folders or objects.
   - Force: Select this option to add and replace all folders or objects.
5. Use the ACL option to specify how the folders or objects are assigned permissions using Access Control Lists (ACLs) when unarchived.
   - Inherit: Inherits the folder or object’s permissions (ACL) from its new parent folder.
   - Preserve: Preserves the folder or object’s permissions (ACL) as it was in the original, mapping accounts as necessary.
Create: Preserves the folder or object's permissions (ACL) as it was in the original, creating and mapping accounts as necessary.

6. Click OK.

What Happens to Modified Analytics and Reports When an Update Is Applied?

When saved in the Custom subfolder within Shared Folders, or in My Folders in the business intelligence (BI) catalog, modified analytics and reports are preserved during an update. Any modified objects in the Custom folder are preserved in any update. Changes to existing analytics and reports outside the Custom folder, including those you create, are preserved only if the update doesn't include a new version of those BI objects. If the update includes a new version of a predefined object that you edited outside the Custom folder, then:

- The new version overwrites the existing predefined object.
- A copy of the existing object (with your edits) is automatically created in the same folder, with a new name that indicates it's a new version.

If the update includes a new version of both the predefined object and a folder in its file path, then:

- The new folder, along with the new version of the object, overwrites the existing predefined folder and object.
- A copy of the existing folder (along with your edited object) is automatically created. The folder is renamed to indicate that it's a new version, but your edited object is not renamed.

Note: Future updates won't affect renamed objects or anything within a renamed folder.
6 Using Subject Areas for Analytics

Creating Analytics with Subject Areas

The analytics in Oracle Sales Cloud are created in Oracle Business Intelligence (BI) Answers using the standard ready-to-use subject areas. You can build your own analyses, as well as your own custom subject areas.

Understanding Subject Areas

Creating an analysis begins with subject areas. A subject area is basically a grouping of information pieces, or more technically, a grouping of data objects, that relate to each other in a particular context. Examples of context are pipeline, revenue, partners, performance, and so on.

Subject area data objects are pulled from your transactional database, then grouped together in a way that answers a specific set of questions about your sales organization. Every time someone adds sales information, and selects "Save", those pieces of information are stored, and can be used to build real-time and historical analyses. Anything that involves a sales transaction can be grouped into a subject area, then used to build analytics that expose key metrics for your sales organization.

Working with Subject Areas

Standard subject areas are built from sales transactional objects such as Employee, Activity, or Customer. The attributes of these objects are available in the Dimension folders and can be added to your analyses as columns. An attribute could be employee name, address, manager and so on. The Fact folders contain filters to count or measure the information.

Using Subject Areas to Answer Business Questions

Building custom analytics starts with gaining an understanding of what questions you want to answer with this analysis. In a sales organization, your questions relate to sales activities. Depending on what role uses your analysis, your questions can be about pipeline, performance, quotas, opportunities, activity, and so on. As an analytics administrator, you should know which prebuilt or custom analysis provides insight on a particular business question that your organization is trying to answer. Subject areas are built around sets of business questions for a particular context such as pipeline, performance, quota and so on.

Subject areas contain columns and facts. Facts are metrics you add to your analysis to measure values in data. For example, if you are looking at pipeline data, you might want to know how many deals are closing in the next 30 days. The count of deals in that stage is a fact metric.

You can easily examine the subject areas that are available for you to build analytics. Go to BI, and go to New along the top of the page. Select the analysis option and see the list of subject areas available. You don't actually have to build an analytic to see what data is available in that subject area. Select a subject area as if you are building an analysis. The analytic editing palette opens with the subject areas. You can expand any of the dimension folders to explore the columns of data available for building an analytic in the context of the subject area you are viewing.
The following are some examples of how subject areas can answer your business questions:

<table>
<thead>
<tr>
<th>Subject Area Name</th>
<th>Example Business Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales - CRM Pipeline</td>
<td>• Are my sales representatives moving their opportunities fast enough.</td>
</tr>
<tr>
<td></td>
<td>• How is each member on my team performing on deal size, account coverage, and win rate?</td>
</tr>
<tr>
<td></td>
<td>• Is my team converting leads to opportunities fast enough?</td>
</tr>
<tr>
<td></td>
<td>• What are the most likely reasons that we lose against our key competitors?</td>
</tr>
<tr>
<td></td>
<td>• What are the top 10 open opportunities?</td>
</tr>
<tr>
<td>Sales - CRM Forecasting</td>
<td>• What are my forecasts and closed revenues for this quarter?</td>
</tr>
<tr>
<td></td>
<td>• Are revenues closed in time for their forecast figures?</td>
</tr>
<tr>
<td></td>
<td>• Does the forecast versus pipeline show a healthy picture?</td>
</tr>
<tr>
<td></td>
<td>• What were my forecast revenues for the same period last year?</td>
</tr>
<tr>
<td>Sales - CRM Sales Activity</td>
<td>• Is there any work load balancing issues on my team?</td>
</tr>
<tr>
<td></td>
<td>• I want to rebalance my team workloads. Based on upcoming activity levels what are my</td>
</tr>
<tr>
<td></td>
<td>resource levels?</td>
</tr>
<tr>
<td></td>
<td>• Are there accounts that are being heavily pursued?</td>
</tr>
<tr>
<td></td>
<td>• How can I identify neglected but strategic accounts?</td>
</tr>
</tbody>
</table>

Exploring Subject Area Context: Worked Example

Subject area context is very important to understand. The context defines what column details the analysis displays. Adding an employee column doesn’t mean all employees show up in the analysis. It depends on the context you are using to create the analysis. If you build an analysis, and it doesn’t show what you are expecting, be sure that you are adding your columns and facts in context.

The subject area dimension folders contain the columns and the facts folders define the relationship of the columns. If you add the Employee column to your analysis, and then add the Fact, Number of Activities to the same analysis, then only the employees that have one or more activities show on this analysis in this context. There might be hundreds of employees that have some sort of relationship with A.C. Networks, but no associated activities, so they will not show up on your activity analysis.

The following is an example that might help explain this further.

In this exercise you will build an activity analysis, and add an additional subject area, then explore some different scenarios.

1. Build an activity analysis as directed in "Creating an Activity Analysis: Worked Example".
2. With your activity analysis in edit mode, add the standard subject area Sales - CRM Quota Management.
3. Both subject areas appear under Subject Areas. Expand Sales - CRM Sales Activity. Expand Customer. Expand Sales Account Extension. Drag Level 1 Account Name onto the palette.
4. Still in Sales Activity, expand Employee. Drag First Name and Last Name onto the palette.
5. Expand Facts, then Activity Facts. Drag # of Activities onto the palette. This fact is key to this analysis because the relationship of Employee to this subject area is dependent on the employee having one or more activities for one or more accounts. If your employee has never entered activities for any given account, they will not show up on this report, even if they have another type of relationship with an account. Since the context of this subject area has to do with sales activities, only employees with activities are included.
6. Now select the "Results" tab. You see four employees in the resulting analysis. Each of these employees has one or more activities.

8. Go to the "Results" tab. Notice that now there are more employees. This result is because you have added employees that also have relationships to Quota Management. In this case, employees are added that have generated revenue.

9. Go back to "Criteria". Remove # of Activities. The results show only the three employees that have revenue. Helena has both revenue and activities so she shows up in both scenarios.

Finally, note that if you remove both # of Activities and Opportunity Revenue and look at the results, you again have only the four employees that have a relationship with only the Sales Activity dimension.

**EMPLOYEES IN DIFFERENT SUBJECT AREA CONTEXT**

Sean is an Employee. He is a sales rep who has revenue quotes. In this case, the context of employee has to do with Quota Management, the Opportunity Revenue column. The relationship of Sean to this Dimension relates to Quotas only. Sean has never added detail on sales activity so he only shows up on the report in the context of Quota Management, in this case, revenue.

Helena is an Employee. She adds activity details, as well as generates revenue. In this case the context of Helena as an employee has to do with sales activity and quota management revenue both. Helena shows up on both reports because she has a relationship with both subject areas.

Sales – CRM Quota Mgmt ← Subject Areas → Sales – CRM Sales Activity

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Sales Cloud Subject Area Updates

This topic details subject areas updates for Sales Cloud for current and recent releases.

The following table details subject area updates for release 18A
Oracle Sales Cloud
Creating and Administering Analytics for Sales
Chapter 6
Using Subject Areas for Analytics

The following table details subject area updates for release 18B

<table>
<thead>
<tr>
<th>What is the Update?</th>
<th>Subject Area Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subject area name changed</td>
<td>Sales - CRM Sales Activity is changed to <strong>CRM - CRM Activity Real Time</strong></td>
</tr>
<tr>
<td>Subject area name changed</td>
<td>Sales - CRM Activity Contact is changed to <strong>CRM - CRM Activity Contact Real Time</strong></td>
</tr>
<tr>
<td>Subject area name changed</td>
<td>Sales - CRM Activity Objective is changed to <strong>CRM - CRM Activity Objective Real Time</strong></td>
</tr>
<tr>
<td>Subject area name changed</td>
<td>Sales - CRM Activity Resource is changed to <strong>CRM - CRM Activity Resource Real Time</strong></td>
</tr>
</tbody>
</table>

The following table details subject area updates for release 18B

<table>
<thead>
<tr>
<th>What is the Update?</th>
<th>Subject Area Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>New subject area</td>
<td>New subject area called <strong>Partners - CRM Programs</strong> for partner program reporting.</td>
</tr>
<tr>
<td>New subject area</td>
<td>New subject area called <strong>Partners - CRM Program Tiers</strong> for partner program tier reporting.</td>
</tr>
</tbody>
</table>

**Downloading a List of Sales Cloud Subject Areas**

Oracle Sales Cloud comes with a variety of standard subject areas for you to select from. This chapter has a listing of subject areas along with a description. For additional detail on Subject Areas go to Customer Connect and download the spreadsheet at, https://cloudcustomerconnect.oracle.com/files/da4fd51d24/Sales-OTBI-Sub-Area-Doc-R13.xlsx. You can also click the Related Topics link to get the spreadsheet directly.

**Related Topics**
- Expanded Subject Area Detail in Excel Spreadsheet Format

**Incentive Compensation Subject Areas**

**IC Business Intelligence Subject Areas: Explained**

The following table describes the incentive compensation business intelligence subject areas. It also provides sample questions that users answer with each subject area.

<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Description</th>
<th>Answer Questions Like These</th>
</tr>
</thead>
<tbody>
<tr>
<td>Incentive Compensation Transactions Real Time</td>
<td>Compensation analysts use it to check the results of the Collect Transactions process. They can review raw transactions before the crediting process as well as descriptive flexfield values.</td>
<td>• Were transactions successfully collected into the application?</td>
</tr>
<tr>
<td>Subject Area</td>
<td>Description</td>
<td>Answer Questions Like These</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Incentive Compensation Credits Real Time        | This subject area supports detailed operational reporting. You can combine Credits Real Time and Transaction Real Time subject areas in a single report.                                                               | • Are participants correctly credited?  
• Were there credit or rollup errors that must be fixed?  
Create reports to show various credit transaction attributes that analysts can use to address participant credit disputes.  
Create reports that show participants and their managers their credit transactions. Managers view only their own or direct report information based on the HR Supervisor Hierarchy.  
You can combine Credits Real Time and Transaction Real Time subject areas in a single report.  
• Are participants correctly credited?  
• Were there credit or rollup errors that must be fixed? |
| Incentive Compensation Attainments Real Time    | This subject area supports detailed validation reporting. You can combine Attainments Real Time and Transaction Real Time subject areas to use a single report.                                                  | • How much credit did participant A receive for his or her sales transactions?  
• How much credit did my team receive for its attainment?  
• What are the various attainment attributes associated with my credits?  
Sales management reports use it to review participant achievements with different performance measures at transaction-level detail in real time.  
You can combine Attainments Real Time and Transaction Real Time subject areas in a single report.  
• How much credit did participant A receive for his or her sales transactions?  
• How much credit did my team receive for its attainment?  
• What are the various attainment attributes associated with my credits? |
| Incentive Compensation Earnings Real Time       | This subject area supports the detailed analysis of participant earnings across a variety of dimensions, including the participant hierarchy, compensation plans, plan components, product, customer, and credit categories. It also includes source transaction and credit details. | • Who got paid what amount and from where, at the detail level?  
Participants, analysts, participant managers, and compensation managers use it to:  
• Monitor performance and review incentive results.  
• Review the individualized interval goals by interval, performance measure, and participant.  
• review the individualized interval goals by interval, performance measure, and participant.  
• How does the performance measure attainment compare with a participant’s personalized goal across his directs?  
• How does my performance measure attainment compare with my personalized goal by compensation plan, plan component, and measure?  
• How do participants’ plan component earnings compare with their personalized target incentives? |
<p>| Incentive Compensation - Performance and Earnings Summary Real Time |                                                                                                                                           |                                                                                                                                                                                                                           |</p>
<table>
<thead>
<tr>
<th>Subject Area</th>
<th>Description</th>
<th>Answer Questions Like These</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Incentive Compensation Participant Balances</strong></td>
<td>Compensation analysts use it to review payment, draw balances, carry over from prior periods, and hold backs. It includes beginning, period to date, interval to date, and ending balances for the year, by period.</td>
<td>• Why wasn't I paid correctly? Asked by participants. Might be due to draw recovery or manual adjustments. Analysts might use the balances while resolving a dispute.</td>
</tr>
<tr>
<td><strong>Real Time</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Incentive Compensation Payments Real Time</strong></td>
<td>Compensation managers use it to review participant payments on different pay components in real time. Source transaction detail, credit detail, earnings, and payment details, such as earning rates and percentage, are available.</td>
<td>• What is my cost of compensation by participant, plan component, plan, and frequencies?</td>
</tr>
<tr>
<td><strong>Incentive Compensation Paysheet Summary</strong></td>
<td>Compensation managers use it to review participant payments at a high level of detail, in real time.</td>
<td>• What is the current status of the payment batches? Are they paid, reviewed, or frozen? • What is the status of each paysheet within the payment batches?</td>
</tr>
<tr>
<td><strong>Real Time</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Incentive Compensation Disputes Real Time</strong></td>
<td>Compensation analysts who work with dispute resolution use it because it provides all dispute attributes plus access to source transaction details.</td>
<td>• Is the dispute load balanced between my analysts? Asked by compensation managers. • Is there a large quantity of a specific dispute type, such as credit disputes? This might indicate an issue in direct or rollup credit rules.</td>
</tr>
<tr>
<td><strong>Incentive Compensation Participant Detail</strong></td>
<td>Use it to view details of the participant object. The participant object can be extended using its associated descriptive flexfield, which can be configured to capture user-defined attributes. You can combine delivered attributes, such as home currency and business unit, with extended attributes to create an overview of the participant for validation purposes.</td>
<td>• To what country and business unit does the participant belong? • What is the participant’s home currency or cost center? • Is the participant active? And for which dates?</td>
</tr>
<tr>
<td>Subject Area</td>
<td>Description</td>
<td>Answer Questions Like These</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Subject Area</strong></td>
<td><strong>Description</strong></td>
<td><strong>Answer Questions Like These</strong></td>
</tr>
<tr>
<td>You can combine this subject area with others, such as attainment, earnings, or payment to create detailed reports. Use the extended attributes to constrain the data of the joined subject area.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Incentive Compensation Plan Assignments Real-Time     | Compensation managers or administrators use it to check and validate to which plan and role each participant is assigned.                                                                                                           | • Which participants are assigned to which plan?  
• What type of assignment does a participant have to a plan?  
• What are the assignment start and end dates for a participant?  
• How was the participant assigned to the plan, directly or by role?  
• Has the participant accepted the assignment to the plan?  
• Does the participant have an individualized target incentive for the plan? |
| Incentive Compensation Pay Group Assignments Real Time | Compensation managers and analysts use it to review and validate the accuracy of pay group assignments across all participants.                                                                                                       | • Which participants are assigned to a given pay group?  
• What pay groups are in the application? What are their types and descriptions?  
• When was a given participant assigned to a specific pay group?  
• As a participant manager, to which pay groups do my direct reports belong? |
| Incentive Compensation - Compensation Plan Assignments Real Time | Compensation analysts use it to review and validate payment plan assignments across participants and the time dimension.                                                                                                           | • What participants are assigned to which payment plans?  
• What are the individualized recovery details for a given participant?  
• What percent or amount is to be paid to an individual?  
• What is the maximum payment amount or cap? |
| Incentive Compensation Earning and Attainment Summary Real Time | To hide this subject area, set the profile option CN_HIDE_OTBI_SUBJECT_AREAS, Hide Legacy Incentive Compensation Business Intelligence Subject Areas, to Yes.                                                                 | • Are we on track in achieving quota this period or quarter?  
• Which of my direct reports’ attainment or earnings are below the wanted performance expectation? |
| Sales management reports use it to review participant achievement with specific performance measures. They also compare achievement—in summary—across a variety of attributes. |                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                               |
| Review attainment and earnings at various frequencies, such as period and interval, depending on the measure interval. Also review participant on target earnings by plan component. |                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                               |
Subject Area

<table>
<thead>
<tr>
<th>Description</th>
<th>Answer Questions Like These</th>
</tr>
</thead>
<tbody>
<tr>
<td>You can combine this subject area with the Participant Interval Goals Real Time and Participant Period Goals Real Time subject areas to review attainment and goals together. When creating this cross-subject-area report, add the Participant common dimension from each subject area to your report and hide one of the Participant dimensions. The Participant Performance Summary Real Time work area alone provides the information you need without creating a cross-subject-area report.</td>
<td></td>
</tr>
</tbody>
</table>

Compensation administrators can use this data with the Payments Real Time subject area to resolve payment disputes.

- For individually calculated earnings, you can trace back to the credits and transaction subject areas to validate credit percent or transaction attributes used in calculation.
- For earnings calculated using grouped transactions, add Participant Name as the common dimension from each subject area and hide one of the dimensions.

**Note:** There isn’t a one-to-one relationship between earnings and transactions when transactions are grouped.

Incentive Compensation Participant Interval Goals Real Time

To hide this subject area, set the profile option CN_HIDE_OTBI_SUBJECTAREAS Hide Legacy Incentive Compensation Business Intelligence Subject Areas, to Yes.

Compensation managers or analysts use it to review the individualized interval goals by interval, performance measure, and participant.

You can compare total quota to credit attainment by performance measure by creating a cross-subject-area report for this subject area. Add Participant Name as the common dimension from each subject area and hide one of the dimensions. Typically, you use the Earning and Attainment Summary Real Time subject area for this analysis. The Participant Performance Summary Real Time work area alone provides the information you need without creating a cross-subject-area report.

- What is the total quota across the organization by performance measure for the interval?
- What is the total quota by performance measure for the interval across the organization?
- Is the company on track to attain its goals? Who is lagging and might require coaching?

Answering the secondary question requires a cross-subject-area join.

- Do I have to realign quota based on current attainment levels?

Answering this question requires a cross-subject-area join.
### Incentive Compensation Participant Period Goals Real Time

To hide this subject area, set the profile option `CN_HIDE_OTBI_SUBJECT_AREAS` to Yes. Hide Legacy Incentive Compensation Business Intelligence Subject Areas, to Yes. Compensation managers or analysts use it to review individualized period goals and performance measures by participant.

You can compare period quota to credit attainment by performance measure by creating a cross-subject-area report with this subject area. Add Participant Name as the common dimension from each subject area, hiding one of the dimensions. Typically, you use the Earning and Attainment Summary Real Time subject area for this analysis. The Participant Performance Summary Real Time work area alone provides the information you need without creating a cross-subject-area report.

- What is the total quota across the organization by performance measure for the period or across periods?
- What is the total quota by performance measure for the period across the organization?
- Validate quota levels.
- Is the company on track to attain its goals? Who is lagging and might require coaching?
- Answering the secondary question requires a cross-subject-area join.
- Do I have to realign quota based on current attainment levels?
- Answering this question requires a cross-subject-area join.

### Incentive Compensation Participant Compensation Plan Real Time

To hide this subject area, set the profile option `CN_HIDE_OTBI_SUBJECT_AREAS` to Yes. Compensation and participant managers use it to view compensation plans and individualized participant plans to compare incentive targets and performance measure goals. The Participant Performance Summary Real Time work area alone provides the information you need without creating a cross-subject-area report.

- What are my compensation plan incentive targets?
- How are these targets individualized across the participants assigned to the plan?
- How do these targets break down by plan component?
- Are my individualized performance measure goals set properly?
- How do they compare to the base goals set on the measure?
- Who is assigned to a given plan?
- What are the targets and goals settings for an individual?
- As a participant manager, what are the targets and goals settings for my direct reports?

### Incentive Compensation Rules Real Time

Compensation Analysts use it to verify the Credit, Roll-up and Classification rules setup. They can build ad-hoc queries and operational reports using this subject area. Credit rules determine who gets the credit for a sales transaction. Classification rules are used to classify sales transactions to user-defined categories such as credit categories. Generally these rules are organized in hierarchical fashion.

- What are the rules effective as of the given date in the hierarchy?
- What are the credit rules to which a credit receiver is assigned?
- What are the rules which contain the given criteria for example Sales Channel = Distributor What are the classification rules to which a credit category is assigned?
- What are the classification rules to which a credit category is assigned? What are the criteria for a rule including the inherited criteria from the ancestors?
Creating Incentive Compensation Analyses with Multiple Subject Areas: Procedure

When creating certain analyses, you might use information stored in different subject areas. You want to create an analysis that compares a participant’s performance measure goals with their attainment toward those goals for a specific time interval.

To make this comparison, you join data that is stored in these two subject areas:

- Incentive Compensation - Earnings and Attainment Summary Real Time
- Incentive Compensation - Participant Period Goals Real Time

**Note:** To join subject areas, the subject areas must share a common dimension that you can use as a bridge. The analysis in the preceding example would use the Participant dimension.

Creating and Editing Analyses

Create your analyses in Business Intelligence Answers using the Analysis and Interactive Reporting subject areas.

To create or edit an analysis:

1. Open the Reports and Analytics pane in any work area.
2. Click the **Browse Catalog** button.
3. Click the **New** button, select **Analysis** under **Analysis and Interactive Reporting**, and select a subject area.
   Or, select your analysis in the Folders pane and click **Edit**.
4. Use the tabs as described in this table.

<table>
<thead>
<tr>
<th>Tab</th>
<th>Task</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria</td>
<td>Select and define the columns to include.</td>
</tr>
</tbody>
</table>

Example:

a. Incentive Compensation - Earnings and Attainment Summary Real Time
   - Participant - Participant
     This is the common dimension shared by both subject areas. You show this instance of the dimension in this analysis.
   - Attainment Summary - Performance Measure - Performance Measure
   - Attainment Summary - Performance Measure - Unit of Measure
   - Attainment Summary - Performance Measure - Interval Type
   - Attainment Summary - Attainment Summary - Period-to-Date Attainment
b. Incentive Compensation - Participant Period Goals Real Time
   - Participant - Participant
     This is the common dimension shared by both subject areas. You hide this instance of the dimension in this analysis.
   - Participant Period Goal - Period Target

Add filters for the analysis.

Results
Add views and set options.
Tab | Task
---|---
Prompts | Define prompts to filter all views in the analysis.
| Example: Year and Period from the Calendar dimension

Advanced | View or update the XML code and logical SQL statement that are generated for the analysis.
| Set options related to query performance.

5. Save your analysis.

**Performing Other Actions on an Analysis**

1. Open the Reports and Analytics pane in any work area where the analysis is available.
2. In the Contents pane, select your analysis in the pane and click **More**.
3. On the Catalog content area **More** menu for your analysis, select an action, for example **Delete** or **Copy**.

**Can I include multiple subject areas in incentive compensation Oracle Transactional Business Intelligence analyses?**

Yes. For performance purposes, the best practice is to use no more than two subject areas for any given analysis. The common dimensions that you can use to join two subject areas are:

- Business Unit
- Calendar
- Participant
- Participant Name

Use the common dimension that’s most appropriate to determining the fact value for the analysis.

> **Note:** Not all of these common dimensions are present in all subject areas.
7 Creating and Editing Analytics

Data Structure for Analytics: Explained

Oracle Business Intelligence repository contains the metadata that defines which columns (or piece of data) are available for you to include in analyses, and where data for each column originates. The repository is organized into subject areas, which contain folders with the columns.

Note: You can also use the Oracle BI repository as a data source for reports.

Columns

This table describes the three types of columns.

<table>
<thead>
<tr>
<th>Column Type</th>
<th>Description</th>
<th>Example</th>
<th>Icon for Column Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fact</td>
<td>Provides a measure of something, meaning that the values are numbers.</td>
<td>Total</td>
<td>Yellow ruler</td>
</tr>
<tr>
<td>Attribute</td>
<td>Represents a piece of information about a business object, with values that are dates, IDs, or text.</td>
<td>Start Date</td>
<td>Gray paper</td>
</tr>
</tbody>
</table>
| Hierarchy   | Holds data values that are organized in a hierarchical manner. | Time, with sublevels:  
  • Year  
  • Quarter  
  • Month | Column: Hierarchy of blue squares  
  Sublevel: Blue or white square |

Subject Areas

When you create an analysis, you first select a subject area, which contains columns related to a specific business object or area. You then open folders within the subject area to find the columns to include in your analysis.

Folders

Each subject area has one fact folder and a number of dimension folders. Folders can have subfolders.

• Fact folders:
  • Contain fact columns.
  • Are usually at the bottom of the list of folders and are usually named after the subject area.
• **Dimension folders:**
  - Contain attribute and hierarchical columns.
  - Are joined to the fact folder within a subject area.
  
  For example, if your analysis has the Currency attribute from a dimension folder, you see currencies in the results. If you also add the Total fact, then your analysis includes only records with both a currency and a total amount. The more columns you add, the smaller the query set for your analysis.
  - Can be common folders or common dimensions that appear in more than one subject area.

  **Note:** If your analysis has columns from multiple subject areas, then you:
  - Include columns only from dimension folders that are common to all of those subject areas. At least one such column is mandatory.
  - Must include one column from the fact folder in each of those subject areas.

**Related Topics**
- Downloading a List of Sales Cloud Subject Areas
- Using Subject Areas to Answer Business Questions

### Analysis and Report Limits: Explained

Limits on analysis and reports prevent long-running queries. Examples include:

- Analytics row limits
- Query time limits
- Report Memory Guard limits

This table describes the limits that constrain queries.

<table>
<thead>
<tr>
<th>Application</th>
<th>Context</th>
<th>Limit</th>
<th>Description</th>
<th>Limit Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Answers</td>
<td>Analysis</td>
<td>Query Time Limit - Minutes</td>
<td>Time (in minutes) allowed for a query to return from the database.</td>
<td>10</td>
</tr>
<tr>
<td>Answers</td>
<td>Analysis</td>
<td>Rows Retrieved By SQL Query</td>
<td>Maximum rows retrieved by a logical SQL query.</td>
<td>75,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Analysis</td>
<td>Rows Exported - CSV/Tab/XML - All Data - Export On Demand</td>
<td>Maximum data rows exported from the analysis into CSV, Tab Delimited and XML formats. This limit is enforced when the user exports directly from the analysis.</td>
<td>65,000</td>
</tr>
<tr>
<td>Application</td>
<td>Context</td>
<td>Limit</td>
<td>Description</td>
<td>Limit Setting</td>
</tr>
<tr>
<td>-------------</td>
<td>---------</td>
<td>-------</td>
<td>-------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Answers</td>
<td>Analysis</td>
<td>Rows Exported - CSV/ Tab/XML - All Data - Export Through Agent</td>
<td>Maximum data rows exported from the analysis into CSV, Tab Delimited and XML formats. This limit is enforced when you export using a scheduled agent.</td>
<td>25,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Table</td>
<td>Maximum Rows Used To Populate Table</td>
<td>Maximum rows that can returned from an analysis query when populating the table. Anything higher than this results in failure to render the table.</td>
<td>75,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Table</td>
<td>Rows Exported - Excel/ PDF - Per View - Export On Demand</td>
<td>Maximum rows exported from a view to formats like PDF, Excel and Powerpoint. This limit is enforced when the user exports directly from the analysis.</td>
<td>25,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Table</td>
<td>Rows Exported - Excel/ PDF - Per View - Export Through Agent</td>
<td>Maximum rows exported from a view to formats like PDF, Excel and Powerpoint. This limit is enforced when you export using a scheduled agent.</td>
<td>25,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Table</td>
<td>Cells</td>
<td>Maximum number of data cells in a table view.</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Table</td>
<td>Sections</td>
<td>Maximum number of sections available for the view.</td>
<td>25</td>
</tr>
<tr>
<td>Answers</td>
<td>Table</td>
<td>Default Rows Per Page In View</td>
<td>Default rows displayed per page in the view. This can be increased in the view properties.</td>
<td>25</td>
</tr>
<tr>
<td>Answers</td>
<td>Table</td>
<td>Maximum Rows Per Page In View</td>
<td>Maximum rows that can be displayed per page in the view.</td>
<td>500</td>
</tr>
<tr>
<td>Answers</td>
<td>Table</td>
<td>Prompt Values</td>
<td>Maximum number of values allowed in Table Prompt. Exceeding this value results in &quot;Exceeded configured maximum number&quot; error.</td>
<td>1,000</td>
</tr>
<tr>
<td>Application</td>
<td>Context</td>
<td>Limit</td>
<td>Description</td>
<td>Limit Setting</td>
</tr>
<tr>
<td>-------------</td>
<td>-------------</td>
<td>--------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Answers</td>
<td>Pivot Table</td>
<td>Maximum Rows Used To Populate Pivot Table</td>
<td>Maximum number of rows that can be returned from an analysis query when populating the pivot table.</td>
<td>40,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Pivot Table</td>
<td>Rows Exported - Excel/ PDF - Per View - Export On Demand</td>
<td>Maximum rows exported from a view to formats like PDF, Excel and Powerpoint. This limit is enforced when the user exports directly from the analysis.</td>
<td>25,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Pivot Table</td>
<td>Rows Exported - Excel/ PDF - Per View - Export Through Agent</td>
<td>Maximum rows exported from a view to formats like PDF, Excel and Powerpoint. This limit is enforced when you export using a scheduled agent.</td>
<td>25,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Pivot Table</td>
<td>Cells</td>
<td>Maximum populated cells of data in the view.</td>
<td>1,000,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Pivot Table</td>
<td>Sections</td>
<td>Maximum sections available for the view.</td>
<td>25</td>
</tr>
<tr>
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<td>Pivot Table</td>
<td>Default Rows Per Page In View</td>
<td>Default rows displayed per page in the view. This can be increased in the view properties.</td>
<td>25</td>
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<tr>
<td>Answers</td>
<td>Pivot Table</td>
<td>Maximum Rows Per Page In View</td>
<td>Maximum rows that can be displayed per page in the view.</td>
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<td>Prompt Values</td>
<td>Maximum number of values that can be returned in a Pivot prompt. Exceeding this value results in ‘Exceeded configured maximum number’ error.</td>
<td>1,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Pivot Table</td>
<td>Columns In Export</td>
<td>Maximum exportable columns.</td>
<td>300</td>
</tr>
<tr>
<td>Answers</td>
<td>Chart</td>
<td>Sections</td>
<td>Maximum sections available for the view.</td>
<td>25</td>
</tr>
<tr>
<td>Application</td>
<td>Context</td>
<td>Limit</td>
<td>Description</td>
<td>Limit Setting</td>
</tr>
<tr>
<td>-------------</td>
<td>---------------</td>
<td>--------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Answers</td>
<td>Chart</td>
<td>Slider Values</td>
<td>Maximum amount of values available on the slider.</td>
<td>150</td>
</tr>
<tr>
<td>Answers</td>
<td>Chart</td>
<td>Rows Displayed</td>
<td>Maximum amount of data points available on the chart.</td>
<td>2,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Chart</td>
<td>Prompt Values</td>
<td>Maximum number of values listed in the view prompt. Exceeding this value results in 'Exceeded configured maximum number' error.</td>
<td>1,000</td>
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<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Maximum Rows Used To Populate Simple Trellis</td>
<td>Maximum rows that can returned from an analysis query when populating the simple trellis. Anything higher than this results in failure to render the simple trellis.</td>
<td>40,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Cells</td>
<td>Maximum populated cells of data in the view.</td>
<td>1,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Sections</td>
<td>Maximum sections available for the view.</td>
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</tr>
<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Default Rows Per Page In View</td>
<td>Default rows displayed per page in the view. This can be increased in the view properties.</td>
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</tr>
<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Maximum Rows Per Page In View</td>
<td>Maximum rows that can be displayed per page in the view.</td>
<td>100</td>
</tr>
<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Column In Export</td>
<td>Maximum exportable columns.</td>
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</tr>
<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Prompt Values</td>
<td>Maximum number of values listed in the view prompt. Exceeding this value results in 'Exceeded configured maximum number' error.</td>
<td>1,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Rows Exported - Excel/ PDF - Per View - Export On Demand</td>
<td>Maximum rows exported from a view to formats like PDF, Excel and Powerpoint. This limit is enforced when the user</td>
<td>6,500</td>
</tr>
<tr>
<td>Application</td>
<td>Context</td>
<td>Limit</td>
<td>Description</td>
<td>Limit Setting</td>
</tr>
<tr>
<td>-------------</td>
<td>---------</td>
<td>-------</td>
<td>-------------</td>
<td>--------------</td>
</tr>
<tr>
<td>Answers</td>
<td>Simple Trellis</td>
<td>Rows Exported - Excel/ PDF - Per View - Export Through Agent</td>
<td>Maximum rows exported from a view to formats like PDF, Excel and Powerpoint. This limit is enforced when you export using a scheduled agent.</td>
<td>100</td>
</tr>
<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Maximum Rows Used To Populate Advanced Trellis</td>
<td>Maximum rows that can returned from an analysis query when populating the advanced trellis. Anything higher than this results in failure to render the advanced trellis.</td>
<td>40,000</td>
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<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Cells</td>
<td>Maximum populated cells of data in the view.</td>
<td>5,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Sections</td>
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<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Default Rows Per Page In View</td>
<td>Default rows displayed per page in the view. This can be increased in the view properties.</td>
<td>10</td>
</tr>
<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Maximum Rows Per Page In View</td>
<td>Maximum rows that can be displayed per page in the view.</td>
<td>100</td>
</tr>
<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Columns In Export</td>
<td>Maximum exportable columns.</td>
<td>150</td>
</tr>
<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Prompt Values</td>
<td>Maximum number of values listed in the view prompt. Exceeding this value results in &quot;Exceeded configured maximum number&quot; error.</td>
<td>1,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Rows Exported - Excel/ PDF - Per View - Export On Demand</td>
<td>Maximum rows exported from a view to formats like PDF, Excel and Powerpoint. This limit is enforced when the user exports directly from the analysis.</td>
<td>10,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Advanced Trellis</td>
<td>Rows Exported - Excel/ PDF - Per View - Export Through Agent</td>
<td>Maximum rows exported from a view to formats like PDF, Excel and</td>
<td>100</td>
</tr>
<tr>
<td>Application</td>
<td>Context</td>
<td>Limit</td>
<td>Description</td>
<td>Limit Setting</td>
</tr>
<tr>
<td>-------------</td>
<td>---------</td>
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<td>-------------</td>
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</tr>
<tr>
<td>Answers</td>
<td>Treemap</td>
<td>Prompt Values</td>
<td>Maximum number of values listed in the view prompt. Exceeding this value results in 'Exceeded configured maximum number' error.</td>
<td>1,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Treemap</td>
<td>Cells</td>
<td>Maximum populated cells/tiles of data in the view.</td>
<td>5,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Treemap</td>
<td>Sections</td>
<td>Maximum sections available for the view.</td>
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</tr>
<tr>
<td>Answers</td>
<td>Narrative</td>
<td>Rows</td>
<td>Maximum records available in the view.</td>
<td>40,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Ticker</td>
<td>Rows</td>
<td>Maximum records available in the view.</td>
<td>40,000</td>
</tr>
<tr>
<td>Answers</td>
<td>Dashboard</td>
<td>Rows Exported - Excel/ PDF - Per View - Export On Demand</td>
<td>For tables, pivot tables and trellis views, if the view is set to &quot;Fixed headers with scrolling content&quot;, rows visible on the dashboard are exported, and no more. For example, if a table is showing five rows before scrolling, five rows are exported, even if the table has more rows. If the view is set to &quot;Fixed headers with scrolling content&quot;, an export of the number of rows specified in the view’s &quot;Rows Per Page&quot; parameter is attempted. This setting doesn’t override other row or cell limits, so setting this to a very high row limit only guarantees the standard view’s export limits are honored when exporting from a dashboard. The &quot;Rows Per Page&quot; setting can be higher than the actual limit of rows that can be viewed per page in Answers. Even if the higher row limit doesn't</td>
<td></td>
</tr>
<tr>
<td>Application</td>
<td>Context</td>
<td>Limit</td>
<td>Description</td>
<td>Limit Setting</td>
</tr>
<tr>
<td>-----------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Answers</td>
<td>Dashboard</td>
<td>Rows Exported - Excel/ PDF - Per View - Export Through Agent</td>
<td>The same rules apply as for Export on Demand, but the exports are subject to limits enforced when exporting data through agents.</td>
<td></td>
</tr>
<tr>
<td>BI Publisher</td>
<td>Memory Guard</td>
<td>Maximum report data size for online reports</td>
<td>Maximum data size allowed for online report viewing. When a report data size exceeds the value, the report receives an 'XML Output generated exceeds specified file size limit' error.</td>
<td>300MB</td>
</tr>
<tr>
<td>BI Publisher</td>
<td>Memory Guard</td>
<td>Maximum report data size for offline (scheduled) reports</td>
<td>Maximum data size allowed for scheduled reports. When a report data size exceeds the value, the report receives an XML Output generated exceeds specified file size limit error.</td>
<td>500MB</td>
</tr>
<tr>
<td>BI Publisher</td>
<td>Memory Guard</td>
<td>Free memory threshold</td>
<td>Minimum value for free JVM space. If the report data size exceeds the threshold, then the report is paused to wait for free memory to become available. The report waits for the time specified in the property Maximum Wait Time for Free Memory to Come Back Above Threshold Value. If the free memory does not rise back above the minimum in the wait period specified, the report request is rejected.</td>
<td>500MB</td>
</tr>
<tr>
<td>BI Publisher</td>
<td>Memory Guard</td>
<td>Maximum report data size under the free memory threshold</td>
<td>Maximum single report data size allowed when free JVM memory is under the specified threshold value set in Free memory threshold.</td>
<td>Free memory threshold/10</td>
</tr>
</tbody>
</table>
For example, assuming the default setting of 500MB, if the data generated for a single report exceeds one-tenth of the value set for Free memory threshold, or 50MB, then processing is terminated.

<table>
<thead>
<tr>
<th>Application</th>
<th>Context</th>
<th>Limit</th>
<th>Description</th>
<th>Limit Setting</th>
</tr>
</thead>
<tbody>
<tr>
<td>BI Publisher</td>
<td>Memory Guard</td>
<td>Maximum Wait Time for Free Memory to Come Back Above the Threshold</td>
<td>Maximum time in seconds that a request to run a report waits for free JVM memory to exceed the threshold value. If the free memory becomes available within the time specified, the request proceeds immediately. If free memory is still below the threshold value after the time specified, the request is rejected. For online requests, the larger this property value, the longer the browser will wait for a request to run.</td>
<td>30</td>
</tr>
<tr>
<td>BI Publisher</td>
<td>Memory Guard</td>
<td>Process timeout for online report formatting</td>
<td>For online reports, the maximum time in seconds that a formatting process is allowed to run. If an online report formatting process exceeds the limit, the report errors.</td>
<td>600</td>
</tr>
<tr>
<td>BI Publisher</td>
<td>Data Model</td>
<td>Maximum data size limit for data generation</td>
<td>Maximum XML data size that can be generated from the execution of a data model. This setting applies to both online and scheduled report requests. When the size of the file generated exceeds the value, execution of the data model is terminated and an exception is generated.</td>
<td>500MB</td>
</tr>
<tr>
<td>BI Publisher</td>
<td>Data Model</td>
<td>Maximum sample data size limit</td>
<td>Maximum file size of a sample data file that can be uploaded to the data model editor.</td>
<td>1MB</td>
</tr>
<tr>
<td>BI Publisher</td>
<td>Data Model</td>
<td>DB fetch size</td>
<td></td>
<td>20</td>
</tr>
</tbody>
</table>
Creating a Simple Activity Analysis: Worked Example

You create your activity analyses using subject areas in Oracle Business Intelligence. There is a wizard that walks you through the simple steps.

Creating an Activity Analysis

To build custom analytics you start by defining your objectives. What problem do you want to understand? What insights have potential to drive your sales forward? Subject areas are intended to answer business questions. As an example, the Sales - CRM Sales Activity Subject Area is built to answer the following questions:

- Is there any workload balancing issues in my team?
- Which team members are available to focus on a new product?
- What are my urgent overdue tasks, and what is my workload for this week?
- How is my team performing?
- Which accounts are my sales representative focusing on and does this align with business priorities?
- Which accounts can I focus on more to meet our business objectives?

If you are tasked with building analytics for a Sales Manager, and one aspect of sales activities they are interested in is how much their team is interacting with potential opportunities. They want a quick snapshot of how often a particular opportunity has been contacted. How many times has an employee called, emailed, stopped by, or had any other activity associated with an opportunity? You can build a simple activity analysis to address these questions.

To build a simple activity analysis from a subject area:

1. Click **New** analysis.
2. Select **Sales - CRM Sales Activity**:
   - From the dimension Customer, add **Account Name**.
   - From the dimension Employee, add **Last Name**.
   - From the Facts folder, add **# of Activities**.
3. You can filter Customer to see a specific account, select the properties on **Account Name**.
4. You select the filter to show only A.C. Networks and click **OK**.
This figure shows checking a filtering option to show only records from an individual company, in this case, A.C. Networks.

5. Click **Results**. The Results tab shows your analysis at this point. Move back and forth from Criteria to Results at any time to see your analysis.

6. Name and save your analysis.

**Related Topics**

- Video: Creating a Simple Activity Analysis from a Subject Area

**Creating an Opportunity Analysis: Worked Example**

Opportunity analyses draw from the Sales - CRM Pipeline to show various aspects of the pipeline, including revenue at various stages and total revenue. The analysis you build in this example that shows Total Revenue, Open Pipeline, and Won Revenue for sales representatives for the current quarter.
Creating an Opportunity Analysis

This figure shows the Opportunity Analysis, that you will create in this example.

To create an Opportunity analysis, perform the following steps.

1. Navigate to BI.
2. Select the **New** drop-down list.
3. Select **Analysis**.
4. Go to the editing palette and on the Subject Area panel expand the **Sales - CRM Pipeline** subject area.

This subject area Sales - CRM Pipeline includes the following columns and facts to use for this example.

<table>
<thead>
<tr>
<th>Columns and Facts</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Stage</td>
<td>Contains data on the stage the opportunity on in the pipeline.</td>
</tr>
<tr>
<td>Amount</td>
<td>Contains the amount of the opportunity revenue at a stage in the pipeline.</td>
</tr>
<tr>
<td>Open Pipeline</td>
<td>Contains the amount of the revenue that is not closed in the pipeline.</td>
</tr>
<tr>
<td>Won Revenue</td>
<td>Contains the amount of revenue that is closed in this quarter.</td>
</tr>
</tbody>
</table>
Creating a Historical Trending Analysis: Worked Example

Using historical trending features, sales reps and managers can see how the pipeline and opportunities are trending. They can also use historical trending to detect any anomalies and manage the pipeline more effectively.

Creating Historical Trending Analyses

To create historical trending reports, analyses do the following steps.

1. Navigate to BI.
2. Choose New.
3. Select Analysis.
4. Select the Sales - CRM Historical Pipeline subject area. You may need to scroll down.

This subject area is specifically designed for reporting on opportunities and revenues against their daily, weekly or monthly (depending on the enterprise calendar period setup), quarterly and yearly trends or to compare opportunity and revenue data against specific points in time.

This table shows details for historical snapshot subject area Sales - CRM Opportunity Sales Stage Snapshot.

<table>
<thead>
<tr>
<th>Columns and Facts</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Revenue</td>
<td>Contains the amount of all opportunity revenue in the pipeline for this quarter.</td>
</tr>
<tr>
<td>Enterprise Quarter</td>
<td>Contains real time opportunity custom data</td>
</tr>
<tr>
<td>Pipeline Facts: Number of Opportunities</td>
<td>Contains real time revenue data</td>
</tr>
</tbody>
</table>

5. In the Subject Areas Panel, in the Sales - CRM Opportunities subject area, expand Historical Sales Stage. Add the columns: Sales Stage, Sales Stage Name, and Sales Stage Row ID:

6. Expand Pipeline Detail Facts: Add Amount, Open Pipeline, Won Revenue, % of Total Amount.

7. Expand Pipeline Facts: # of Opportunities.

8. Expand Employee. Add Employee Row ID.


10. Expand Employee. Add Employee Login. On the editing palette, on Employee Login, hover over the gear image and from the drop-down list menu and select Filter. Under Add More Options select Session Variable. In the Session Variable add: USER_PARTY_ID. Select OK. From the drop-down list again, select Delete. You only added the column to add the variable. Adding this variable tells the application to show data for the signed in user specific to her opportunities only.

11. You are finished adding data to your Opportunity analysis. Select the Results tab to view your analysis. Save your analysis. To see how to add this analysis to your user’s work areas, see chapter 5, "Adding Analytics to UI Work Areas".
<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Historical Opportunity Dimension</td>
<td>Contains historical snapshot data on standard opportunity attributes</td>
</tr>
<tr>
<td>Historical Opportunity Extension Dimension</td>
<td>Contains historical snapshot data on opportunity attributes</td>
</tr>
<tr>
<td>Historical Revenue Dimension</td>
<td>Contains historical snapshot data on standard revenue attributes</td>
</tr>
<tr>
<td>Historical Revenue Extension Dimension</td>
<td>Contains historical snapshots data on revenue attributes</td>
</tr>
<tr>
<td>Pipeline Snapshot Date Dimension</td>
<td>Contains opportunity/ revenue snapshot frequency. An attribute from this dimension is a must for reporting on data from any of the historical dimensions and facts</td>
</tr>
<tr>
<td>Opportunity Dimension</td>
<td>Contains real time opportunity data</td>
</tr>
<tr>
<td>Opportunity Extension Dimension</td>
<td>Contains real time opportunity data</td>
</tr>
<tr>
<td>Revenue Dimension</td>
<td>Contains real time revenue data</td>
</tr>
<tr>
<td>Revenue Extension Dimension</td>
<td>Contains real time revenue data</td>
</tr>
<tr>
<td>Other dimensions</td>
<td>Contains real time data</td>
</tr>
<tr>
<td>Historical Pipeline Facts</td>
<td>Similar to pipeline facts in the Sales - CRM Pipeline Subject Area. Here, the measurements are calculated based on historical opportunity snapshot data (at opportunity granularity)</td>
</tr>
<tr>
<td>Historical Pipeline Detail Facts</td>
<td>Similar to pipeline detail facts in the Sales - CRM Pipeline Subject Area. Here, the measurements calculated based on historical opportunity and revenue snapshot data (at revenue granularity)</td>
</tr>
</tbody>
</table>

5. In the regional area, expand **Opportunity**.
6. Double-click **Opportunity Name** to add it to the Selected Columns section. You may need to scroll down to locate Opportunity Name.
7. Add Owner **First Name**.
8. Add Owner **Last Name**.
9. Expand Customer and add **Customer Name**.
10. Collapse Customer and expand **Industry**.
11. Add **Industry Name** and collapse Industry.
12. Expand **Product** and add **Product Name**.
13. Collapse **Product** and expand **Revenue**.
14. Add **Revenue ID** and collapse **Revenue**.
15. Expand **Pipeline Snapshot Date**.
   Notice that you can choose a pipeline date, period (week or month), quarter, or year.
16. Add **Pipeline Snapshot Date** and collapse **Pipeline Snapshot Date**.
17. Expand **Historical Pipeline Detail Facts**.
   Notice that you can add facts on revenue lines, open or closed opportunities, or both.
19. Verify your columns.

After you create a historical trending report, you should create filters for your report. The next section describes this process.

Filtering Historical Analyses

1. Click Create a filter for the current Subject Area, in the local area, under Filters.
2. In the drop-down list, click More Columns.
3. In the dialog box, expand Opportunity.
4. Select Opportunity Status Category.
5. Click OK.
6. Verify that Operator = is equal to / is in.
7. Select Value = OPEN.
8. Click OK to close the New Filter dialog box.

After creating your filters for your historical trending report, you should save your analysis.

Creating Analytics with Multiple Subject Areas

You can create analytics that combine attributes and metrics from custom and standard subject areas that share a common dimension. For example, you can create an analysis that combines data from a custom opportunity subject area with any standard, opportunity-related subject area such as Sales CRM Pipeline. You can create combined analyses for an array of standard objects, including accounts, contacts, households, opportunities, partners, sales accounts, territories, and resources.

Whether you’re creating a new analysis, or using an existing analysis to add objects from your custom subject area, the steps for adding multiple custom or standard subject areas to your palette are the same.

To add multiple subject areas to your analysis:

1. Create your analysis using a single subject area. See “Creating an Activity Analysis: Worked Example”.
2. In the Subject Area section, click the Add/Remove icon.
This figure shows the Add or Remove subject areas icon.

3. Select or remove one or more standard or custom subject areas from this analysis by selecting or deselecting subject area. If you have created custom subject areas, they also appear in this list under the name you assigned to them.

Working with Cross Subject Area Queries

Each subject area contains a collection of dimensional attributes and measures relating to one-dimensional STAR model and grouped into individual folders. The term STAR refers to the semantic model where a single fact is joined to multiple dimensions. You can create an analysis that combines data from more than one subject area. This type of analysis is referred to as a cross-subject area query. Cross-subject area queries are classified into three broad categories:

- Combining queries from multiple subject areas.
  - Using common (conformed) dimensions.
  - Using local and common (confirmed) dimensions.
- Using a "set" operation (Union or Union All for example) to combine more than one result set from different subject areas.
- Combining Logical SQL using the Advanced tab.

A Common dimension is a dimension that exists in all subject areas that are being joined in an analysis. For example, the Customer dimension is the common dimension for the Sales - CRM Pipeline and Marketing - CRM Leads subject areas.

A Local dimension is a dimension that exists only in one subject area. For example, Opportunity and Revenue are local dimensions for the "Sales - CRM Pipeline" subject area.
The following are some general guidelines to follow when working with multiple subject areas:

- If all the metrics and attributes needed for the analysis are available in a single subject area and fact metrics, use that subject area only and do not create a cross subject area query. Such an analysis performs better and is easier to maintain.
- When joining two subject areas in an analysis, make sure at least one attribute from a common dimension is used in the analysis.
- When using common dimensions always choose attributes from the common dimension from a single subject area. For instance if you are using the Customer dimension to build a query between subject area 1 and subject area 2, then select all customer dimension attributes from either subject area 1 or from subject area 2. (Not some customer attributes from subject area 1 and some from subject area 2.) In some scenarios, the common dimension may have more attributes in one subject area than the other. In such a situation, you can only use the subset of common attributes for a cross-subject area query.
- Always include a measure from each subject area that is being used in your analysis. You do not have to display measures or use them, but you should include them. You can hide a measure if not needed in the analysis.
- When using common and local dimensions use SET VARIABLE ENABLE_DIMENSIONALITY=1; in the Advanced SQL tab.

Combining Queries from Multiple Subject Areas

The simplest and fastest way to generate an analysis is to use a single subject area. If the dimension attributes and fact metrics that you are interested in are all available from a single subject area, then you should use that subject area to build the analysis. Such an analysis results in better performance and is much easier to maintain.

If your analysis requirements cannot be met by any single subject area because you need metrics from more than one subject area, you can build a cross-subject area query using common dimensions. There is a clear advantage to building a cross-subject area query using only common dimensions, which is recommended.

Keep in mind that if you use three subject areas for an analysis, your common dimensions must exist in all three subject areas. Joining on common dimensions gives you the benefit of including any metric from any of the subject areas in a single analysis.

While you can create an analysis joining any subject area to which you have access, only a cross-subject area query that uses common dimensions returns data that is at the same dimension grain. This happens so that the data is cleanly merged and the result is an analysis that returns exactly the data you want to see.

Knowing how cross-subject area queries are executed in BI helps you understand the importance of using common dimensions when building such an analysis. When a cross-subject area analysis is generated, separate queries are executed for each subject area in the analysis and the results are merged to generate the final analysis. The data that is returned from the different subject areas is merged using the common dimensions. When you use common dimensions, the result set returned by each subject area query is at the same dimensional grain, so it can be cleanly merged and rendered in the analysis.

Using Common Dimensions for an Analysis

This example pulls the number of Opportunities, number of Opportunity Revenue Lines, number of Leads, and number of Interactions by Customer. The common dimension in all three subject areas used for this analysis is Customer and different fact metrics are pulled from each subject area.

The following subject areas are used for this example analysis:

- Subject area 1: "Marketing - CRM Leads"
- Subject area 2: "Sales - CRM Pipeline"
Subject area 3: "Sales - CRM Sales Activity"

Customer is the common dimension used for this example analysis:
- "Marketing - CRM Leads". "Customer" -- Customer
- "Sales - CRM Pipeline". "Customer" -- Customer
- "Sales - CRM Sales Activity". "Customer" -- Customer

The following are the metric measures for this example analysis:
- Marketing - CRM Leads". "Lead Facts" -- "# of Leads"
- Sales - CRM Pipeline". "Pipeline Detail Facts" -- "# of Opportunity Revenue Lines"
- Sales - CRM Pipeline". "Pipeline Facts" -- "# of Opportunities"
- "Sales - CRM Sales Activity". "Interaction Facts" -- "# of Interactions"

Using Local and Common Dimensions for an Analysis

This example pulls Opportunity Line Revenue by Product and number of Interactions by Customer. Customer is a common dimension in both subject areas used for this query. Product is a local dimension to the Sales - CRM Pipeline subject area and Interaction is a local dimension to Sales - CRM Sales Activity. Different fact metrics are pulled from each subject area. Note that use of local dimension may impact the grain of the analysis. In such cases the metrics may get repeated for each of these rows.

The following are the subject areas used for this example analysis:
- Subject area 1: "Sales - CRM Pipeline"
- Subject area 2: "Sales - CRM Sales Activity"

Sales is the common dimension for this example analysis:
- "Sales - CRM Sales Activity". "Customer" - Customer

The following are the local dimensions used for this example analysis:
- "Sales - CRM Pipeline". "Product" - Product
- "Sales - CRM Sales Activity". "Interaction" -- Interaction

The following are the metrics (measures) used for this analysis:
- "Sales - CRM Sales Activity". "Interaction Facts" -- # of Interactions
- "Sales - CRM Pipeline". "Pipeline Detail Facts" -- Opportunity Line Revenue

The following is the logical SQL used for this analysis:

```
SET VARIABLE ENABLE_DIMENSIONALITY=1; SELECT
0 s_0, "Sales - CRM Pipeline"."Customer"."Customer Name" s_1,
0 s_0, "Sales - CRM Pipeline"."Customer"."Customer Name" s_1,
"Sales - CRM Sales Activity"."Interaction"."Interaction Type Name" s_3,
"Sales - CRM Pipeline"."Pipeline Detail Facts"."Opportunity Line Revenue" s_4,
"Sales - CRM Sales Activity"."Interaction Facts"."# of Interactions" s_5
FROM "Sales - RM Pipeline" ORDER BY 1, 6 DESC NULLS FIRST, 2 ASC NULLS LAST, 3 ASC NULLS
LAST, 4 ASC NULLS LAST FETCH FIRST 65001 ROWS ONLY
```
Using Set Operations to Combine Result Sets from a Subject Area

This example creates a compound analysis query that is a union of two result subsets from same subject area, combining results from:

- #Leads by Campaign from the Marketing - CRM Campaign Performance subject area (result 1)
- #Interactions by Interaction Type from the Marketing - CRM Interactions Real Time subject area (result 2)

```
SELECT saw_0, saw_1 FROM ((SELECT 'Campaign ~ ' || "Marketing Source"."Campaign Name" saw_0, "Response Facts"."# Responses" saw_1 FROM "Marketing - CRM Campaign Performance"
UNION
(SELECT 'Interaction ~ ' || "Interaction"."Interaction Type Code" saw_0, "Interactions Facts"."# of Interactions" saw_1 FROM "Marketing - CRM Interactions Real Time") t1 ORDER BY saw
```

Combining Logical SQL Using the Advanced Tab

If your requirement cannot be met by either of the two methods already discussed, then there is another advanced technique you can try. This technique lets you join multiple logical SQL statements based on common IDs or keys, which can be written against the same or different subject areas, just as used in normal SQL. Both Outer and Equijoin are supported. The following example demonstrates this technique.

Currently Oracle Transactional BI does not support Lead as a dimension for Revenue. However, this example illustrates how you can combine pipeline and lead data in an analysis by combining the logical SQL found on the Advanced tab.

Step 1: Write a BI Answers query using the "Sales - CRM Opportunities and Products Real Time" subject area to show the Revenue line amount and Opportunity. Once the correct results are achieved, go to the Advanced tab and grab the logical SQL associated with this query.

Logical SQL for Query 1:

```
SELECT "Sales - CRM Opportunities and Products Real Time"."Contact"."Full Name" s_1,
      "Sales - CRM Opportunities and Products Real Time"."Opportunity"."Opportunity ID" OPTY_ID,
      "Sales - CRM Opportunities and Products Real Time"."Pipeline Detail Facts"."Opportunity Line Revenue" s_12
FROM "Sales - CRM Opportunities and Products Real Time"
```

Step 2: Write a second BI Answers query using the "Marketing - CRM Leads and Opportunities Real Time" subject area to show Leads associated with the Opportunity. Once the correct results are achieved, go to the Advanced tab and grab the logical SQL associated with this query.

Logical SQL for Query 2:

```
SELECT "Marketing - CRM Leads and Opportunities Real Time"."Lead"."Lead Id" s_1,
      "Marketing - CRM Leads and Opportunities Real Time"."Lead"."Lead Name" s_2,
      "Marketing - CRM Leads and Opportunities Real Time"."Opportunity"."Opportunity ID" s_3,
      "Marketing - CRM Leads and Opportunities Real Time"."Opportunity"."Opportunity Name" s_4
FROM "Marketing - CRM Leads and Opportunities Real Time"
```

Step 3: Go to the Advanced tab in BI Answers and copy/paste the following logical SQL which is an OBIEE - Equijoin of the two previous SQL statements based on Opportunity ID. Use any text editor to combine the logical SQL statements copied from Steps 1 and 2.

```
SELECT Lead_Opty.s_1, Lead_Opty.s_2, Lead_Opty.s_3, Lead_Opty.s_4,
      Opty_Prod.s_1, Opty_Prod.s_2
FROM
  
SELECT
```

ORACLE
"Marketing - CRM Leads and Opportunities Real Time"."Lead"."Lead Id" s_1,
"Marketing - CRM Leads and Opportunities Real Time"."Lead"."Lead Name" s_2,
"Marketing - CRM Leads and Opportunities Real Time"."Opportunity"."Opportunity ID" s_3,
"Marketing - CRM Leads and Opportunities Real Time"."Opportunity"."Opportunity Name" s_4
FROM "Marketing - CRM Leads and Opportunities Real Time"
) Lead_Opty,
(
SELECT
"Sales - CRM Opportunities and Products Real Time"."Contact"."Full Name" s_1,
"Sales - CRM Opportunities and Products Real Time"."Opportunity"."Opportunity ID" OPTY_ID,
"Sales - CRM Opportunities and Products Real Time"."Pipeline Detail Facts"."Opportunity Line Revenue" s_2
FROM "Sales - CRM Opportunities and Products Real Time"
) Opty_Prod
WHERE Lead_Opty.s_3 = Opty_Prod.OPTY_ID

Note: If you create a new analysis using this SQL, any hierarchical columns, member selection, groups or formatting is stripped out.

Joining Custom and Standard Subject Areas

Analyses can be build using combinations of standard, as well as both custom and standard subject areas. Then add subject area option appears once you have created an analysis from a single subject area. You can delete subject areas using these same steps. When you create your analysis, you select a single subject area during the creation steps. Once the analysis is created, you add additional standard or custom subject areas.

For example, if a custom object is used to record past sales value, a join analysis can be created to show the pipeline together with the sales history using a join between the standard subject area CRM Customer Overview, and a custom subject area that includes past sales from the custom object. Only certain objects can be used hen you are combining your own custom subject area with a standard subject area.

The following objects support joining custom with standard subject areas:

- Customer
  - Organization (Account)
  - Sales Account
  - Household (Group)

- Resource
  - Resource
  - Partner Resource
  - Employee
  - Sales Resource

- Contact (Person)
- Opportunity
- Partner
- Territory
Editing Prebuilt Analytics

You edit prebuilt analytics in BI. Select a directory and the contents appear in the pane. Select Edit and the analysis opens in another window for editing.

To edit a prebuilt analysis:

1. Open the analysis for editing in BI.
2. From the tabs select Criteria.
3. Drag and drop columns from the Subject Area pane to the editing palette.

Right-click the gear icon and get options for editing that column such as filtering and deleting that column from the analysis.

Related Topics

• Overview of Prebuilt Analytics

Best Practices for Working with Analytics

For best results when creating and editing analytics, Oracle recommends you refer to the "BI Reports and Dashboard - Best Practices" document located on the Oracle Support site at: https://support.oracle.com/epmos/faces/DocumentDisplay?id=2331484.1. You can also click the link in Related Topics to download the PDF document directly.

Related Topics

• BI Reports and Dashboards - Best Practices Document
8 Managing Analytics in Work Areas

Analytics Work Areas: Overview

Administrators add and edit analytics for the sales user work areas.

Work Areas Available for Sales Cloud Analytics

This table shows the work areas that are available to add analytics.

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sales Pages</td>
<td>Includes five blank pages that administrators configure and add prebuilt or custom analytics.</td>
<td>Not visible until administrators enable the Sales Pages in Set System Options.</td>
</tr>
<tr>
<td>Sales Infolet Page</td>
<td>Comes prebuilt with role-based analytics and infolets. One page for each role.</td>
<td>Not visible until administrators enable the Sales Infolets in Set System Options.</td>
</tr>
<tr>
<td>Object Pages</td>
<td>Analytics can be added to the following object page work areas:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Leads</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Opportunities</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Forecasts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Accounts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Households</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Contacts</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Activities</td>
<td></td>
</tr>
<tr>
<td>Analytics Page</td>
<td>This page is where users can add analyses themselves by searching for the analysis and making it a favorite.</td>
<td>Administrators make custom analytics available for users on the Analytics page by adding session variables on the analysis. These variables can show data specific to the user that is signed in and viewing her Analytics page.</td>
</tr>
</tbody>
</table>

Understanding View Access and Preferences for Users

Your sales users, such as sales representatives, sales managers, or channel partners personalize some of the analytics work areas they use daily. On their Analytics page, users personalize what they see in the following ways:

- Use Search to find an analysis and then make it a favorite to show on that page going forward
- Make favorite analytics from the analytics available to them in the BI and work area directories
• View analytics administrators have set up specifically for their sales role

For other work areas, such as the Opportunities page, the content shows only the record that particular user role is allowed to see. If the signed in user is a Sales Manager, the Opportunities page shows all the opportunities associated with the Sales Manager role, including opportunities for subordinates. Users can personalize what records they see, as long as they have permissions to see them.

The Opportunities page provides a variety of options for users to choose which records they see. Users are limited to only the records the user role has permissions to see. Users can view and filter available records in a variety of ways.

To change view preferences:

1. In the Opportunities page select **Show Advanced Search**.

   This figure shows the Show Advanced Search option.

   ![Show Advanced Search](image)

2. Under **Advanced Search** users select the record set they prefer to view. Notice there are a variety of options available. Any subsets of records shown are only the records that a user is allowed to see based on the role permissions.

   The options available under Advanced Search for the Opportunities Page for various roles are the following:
   
   o Records I own
   o Records where I am on the team
   o Records in my territory
   o Records my subordinates own
   o Records where my subordinates are on the team
   o Records in my territory hierarchy
   o All records I can see

The same role viewing rules apply when users are looking at records in BI. They only see the records their role is allowed to see. If they are viewing the records under the subject area Sales - CRM Pipeline, the records available under Opportunity are specific to the role assigned to them by their administrator.

**Related Topics**

- Adding Case Object View Access to the Newly Created Custom Role
Working in a Sandbox

When you make changes to the work areas, all your changes are first made in a sandbox. The purpose of this is to have an environment to change and review before your changes are published. As you work in your sandbox, any changes you make will not be saved unless you publish your sandbox. If you don’t publish your sandbox and exit out of the sandbox, your changes are discarded.

Creating a Personal Sandbox

Create a new sandbox if you don’t already have one.

To create a sandbox:

1. Click the arrow next to your name and select Manage Sandboxes and create a sandbox.
2. Click New (Plus + icon).
3. In the Create Sandbox dialog enter a sandbox name.
4. Click Save and Close.

Publishing Your Sandbox

To save your changes you must publish your sandbox. You can choose not to save your sandbox if you don’t want to save the changes, or you can publish your sandbox, which overwrites the existing pages with your changed version.

When you are finished making changes to your sandbox, select your sandbox name and select More and then select Publish.

Setting Up the Sales and Sales Infolet Pages

Analytics Prerequisites

This section discusses the initial set up requirements that must be done to ensure your Sales Cloud data shows correctly.

Setting up Infolet Display

The following are the tasks that must be done to enable infolet display:

- Create your company information.
- Create your resource hierarchy.
- Create your accounting calendar and schedule BI processes.
- Create your sales catalog and schedule BI processes.

How to Do the Setup Tasks

The procedures to perform these setup tasks are detailed in “Getting Started with Your Sales Cloud Implementation”. The Related Links in this topic will take you to the pertinent sections with detailed instructions on how to do the setup required for data to show in your infolets.
Related Topics

- Getting Started with Your Sales Implementation
- Preliminary Tasks Overview
- User Account Preferences Setup Overview
- Creating Sales Users Setup Overview
- Sales Catalog Setup Overview

Setting Up the Sales Page Analytics

Administrators enable the sales pages on the Set System Options page. You can enable as many pages as you want, up to a total of five. Once you have enabled the pages, you add analytics by navigating to the Sales Page from the white page navigation dots on the home page. All of the tasks in this section are done by creating and making changes in your sandbox. For more information about sandboxes, see "Working in Your Sandbox".

Enabling the Sales Pages
You enable the Sales Pages by adding a check mark next to the pages.

To enable the Sales Pages:

1. From Navigator select Structure.
2. Select Set System Options.
3. On the Set System Options page, select the box next to the pages you want visible.
4. Click Save and Close.

Adding Content to the Sales Pages
Add analytics to your Sales Pages using Customize Pages.

To add content to your Sales Page:

1. At the top of the page drop-down list the arrow on your name and select Customize Pages.
2. Select Job Role and drop-down list to select the role to which your change should apply. Any analytics you add in this context apply only to the role you define here.
3. Click OK.
4. Click Change Layout.
5. Select a layout.
6. Click Add Content and Open, and navigate to BI and highlight an analytic to add. Select OK.

Related Topics

- Creating a Simple Activity Analysis
- Direct Page Links: Explained

Enabling the Sales Infolet Pages
On the Sales Infolet pages, each sales role has a set of prebuilt analytics that administrators enable. If you add custom roles, you must enable the Sales Infolet page for each new role.
A Sales Representative page includes the following:

- Actual vs. Quota
- Top Open Deals
- Open Pipeline
- Forecast
- Open Leads
- Stalled Deals

The Sales Manager page includes the following:

- Actual vs. Quota
- Top Open Deals
- Open Pipeline
- Forecast
- Team Leads
- Team Performance

To get more detail on all the Sales Infolet pages see, Chapter 5, "Examining the Sales Infolet Content".

**Enabling Your Sales Infolet Page**

You enable the Sales Infolet Page for each individual sales role in your organization.

To Enable the Sales Infolet Page:

1. Click Navigator, then click **Structure**.
2. In Structure, select **Set System Options**.
3. In Set System Options, select **Social Panel** and **Sales Infolets**.

**Adding Analytics to the Sales Infolet Pages**

The Sales and Sales Infolet pages are where your sales team sees key analytics relevant to their job role. Prebuilt analytics are implemented inside portals on the pages called infolets. The infolets come with a set of default analytics set up for roles in your organization. You can manage which analytics you want your users to see. You can add prebuilt, or your own analytics to your infolets. You can also change the way the infolets appear on the page, by changing the infolet size, the shape, and so on.

**Sales Infolet Caching**

As you make changes to your infolets, remember that infolets are cached by default. Currently the default setting is to be cached one hour before the existing infolet content is invalidated and refreshed with new content. This means that any new updates to your analytics are not visible in your infolets for an hour, when the cache is refreshed.

You can manually override this action by opening your analytic in BI, then going to the **Advanced** tab, and checking the Bypass Oracle BI Presentation Services Cache. Once this check box in enabled your infolet analysis is visible immediately.
This image shows the control to bypass the presentation services cache, and make infolet changes immediately available.

### Editing Infolet Tiles and Views

You can change the way the infolet containers appear on the page.

To edit infolet tiles and views:

1. In your sandbox, click the arrow next to your name and select **Customize Work Area Pages**. You see the Customize Pages dialog. Select **Job Role** and select a role. All of the changes you make in this sandbox once saved apply only to employees assigned to the job role you choose. Click **OK**.
2. Click the arrow in the infolet and select **Edit Tile and Views**.
3. The Edit Tiles and Views dialog appears. Select the size and shape of the infolet. Select **Save and Close**.

### Editing Infolet Content

You can change the analytics that show in any of your sales infolets.

To edit infolet content:

1. In your sandbox, click the arrow next to your name and select **Customize Work Area Pages**. You see the Customize Pages dialog. Select **Job Role** and select a role. All of the changes you make in this sandbox once saved apply only to employees assigned to the job role you choose. Click **OK**.
2. Select the infolet you want to change and from the list select **Edit Content**. The Edit Content Dialog appears. Select **Add Content**.
3. The reports directories appear. Navigate to Reports and Analytics > BI Presentation Server > Shared Folders > Sales > Embedded Content. Select the report to add to that infolet and select **Add**. Publish your sandbox when you are finished with your changes.
Adding an Infolet

You can add infolets to your Sales and Sales Infolet pages.

To add infolets:

1. In your sandbox, click the arrow next to your name and select **Customize Work Area Pages**. You see the Customize Pages dialog. Select **Job Role** and select a role. All of the changes you make in this sandbox once saved apply only to employees assigned to the job role you choose. Click **OK**.
2. On the page where you want to add the infolet, select the documents icon.
3. Select **Create Infolet**.
4. Name your infolet and click **Save**.

Your new infolet appears on your Sales Infolet Page. You still must add content by following the steps in **Editing Infolet Content**.

Deleting an Infolet

You can delete infolets from the Sales pages. Delete infolets in your sandbox by selecting the menu on the infolet you are deleting, and selecting **Delete**.

1. In your sandbox, click the arrow next to your name and select **Customize Work Area Pages**. You see the Customize Pages dialog. Select **Job Role** and select a role. All of the changes you make in this sandbox once saved apply only to employees assigned to the job role you choose. Click **OK**.
2. Select the menu on the infolet you are deleting and click **Delete**.

Adding Analytics to Object Pages

Adding Analytics to Object Pages: Overview

Administrators can add analytics to object landing and edit pages. In these procedures the Opportunities landing and edit pages are used as an example.

For the object landing pages there are two steps:

1. Enable the Analytics tab.
2. Add an analytic to the enabled tab.

For the edit object pages, there are three steps:

1. Set the "Is "Prompted" filter on the analytic in BI.
2. Enable the Analytics tab.
3. Add the analytic to the enabled tab.

Enabling Analytics Tabs for Object Landing Pages: Worked Example

The analytics tabs on your object pages do not show by default. Administrators must enable the tabs before they can add analytics to object pages.
Enabling Landing Page Analytics Tabs
This procedure uses the Opportunities object landing page as an example. The procedure is the same for all of the object landing pages.

To enable the opportunities landing page analytics tab:

1. From the Home page, click Navigator.
2. Click Structure.
3. Choose Opportunities.
4. On the analytics row, change the value for visible column to "Yes."
5. Click **Save and Close**.

Adding an Analysis to the Object Landing Page: Worked Example
Once the analytics tab is enabled, administrators add the analytic to the landing page tab. This procedure uses the Opportunity landing page as an example. The procedure is the same for all object edit and landing pages.

Adding an analysis to an Opportunity Landing Page Tab
Once you have enabled the analytics tab, add the analysis.

To add an analysis:

1. In a specific opportunity, select the Analytics tab. You enabled this tab in the previous section.
2. At the top of the Home Page click the arrow next to your name and select Customize Pages. The Customize Pages dialog appears.
3. Select **Job Role** and choose the role to which your change should apply. Any analytics you add in this context apply only to the role you define here.
4. In Opportunities on the analytics tab click **Add Content** and navigate to the analysis you want to show on the Opportunity page.
5. Click **Add** next to the analysis and close the dialog. The analysis is now added to the Analytics tab.

Enabling Analytics Tabs and Adding Analytics to Object Edit Pages: Worked Example
There are three steps to adding analytics to edit object pages.

1. Set the "Is Prompted" filter in the analytic in Business Intelligence. This step is used when the requirement is to view contextual data specific to the record selected.
2. Enable the tab on the object page.
3. Add the analysis to the tab on the object page.

All of these steps are done using the Opportunities landing and edit pages. You can use these same steps for any of the object pages listed as analytics work areas in the table at the start of this section.

Setting the "Is Prompted" Filter
For analytics to show on your user Opportunity pages you enable the "Is Prompted" filter on the name or object ID for the analysis. Adding this filter adds an analytic with data that relates only to the opportunity your user is currently viewing.
To enable the "Is Prompted" filter:

1. Open an existing analysis, or create a new analysis in BI.
2. In the report Criteria tab, select the Filter icon for the appropriate column. Under Operator, select **is prompted**. Leave the other options blank.
3. Click **OK**.

**Enabling Object Edit Page Analytics Tabs**

This procedure uses the Opportunity object landing page as an example. The procedure is the same for all object edit pages.

To enable the edit opportunity page analytics tab:

1. From the Home page click the Navigator.
2. Click Application Composer.
3. Select **Sales** from the Application drop-down list.
4. Expand **Standard Objects** and go to **Opportunity**.
5. Under Opportunity click **Pages**.
6. Under **Detail Page Layouts** copy the standard layout or select an existing created layout where the Analytics tab is added.
7. Click the Reorder tab.

This figure shows the Configure tab option for the edit object page.

8. Click **OK**.
9. Click **Done**. The Analytics tab now shows on the Edit Opportunity page.

**Adding Analytics to Edit Object Tabs**

The final step is to add an analysis to the Edit Object tab you have just enabled. When an analysis is added to the object page, it shows data specific to the signed in user’s transaction record. The specific data shows because of the "is prompted" filter being set in the analytic which passes parameters from the transaction record to the analytic. A parameter is visible in the analytic when a filter prompt is added.
To add an analysis to the Edit Object tab:

1. At the top of the Home Page click the arrow next to your name and select Customize Pages. The Customize Pages dialog appears.
2. Select Job Role and choose the role to which your change should apply. Any analytics you add in this context apply only to the role you define here.
3. In Opportunities on the analytics tab click Add Content and navigate to the analysis you want to show on the Opportunity page.
4. Click Add next to the analysis and close the dialog. The analysis is now added to the Analytics tab.
5. Next step you want to either save the default parameters, or add parameters specific the object your are working with.

   Click Parameters.

   This figure shows the Parameters button on the Edit Opportunity analytic.

   ![](image)

   6. The parameter used is pageFlowScope variable and is set by default for Opportunity, Leads, Partners and custom object pages. For example, in the case of Opportunity the parameter is #pageFlowScope.biFilterName_OpportunityOpportunityId. To use the default parameter, in the Parameters dialog, click Save. Parameters can be changed by updating the parameter values after clicking Parameter button in the field.
This figure shows the parameter value of `pageFlowScope.biFilterName_OpportunityOpportunityId` on an Edit Opportunity ID analytic column.

7. For the objects that are not prepopulated with the `pageFlowScope` parameters, you can use one of these `sessionScope` variables depending on which object page you are on, and the columns available in the analytic.
   - Customer ID: #{sessionScope.zcmAnalyticsCustomerId}
   - Contact ID: #{sessionScope.hzAnalyticsContactPartyId}
   - Contact Name: #{sessionScope.hzAnalyticsContactName}

Exposing the Refresh, Export, and Print Links for Analytics on Tabs

When you are working with analytics on tabs on your interface objects, you have the option of exposing the Print, Export, or Refresh links to the analyses you add to the tabs. This provides your users with handy tools for managing the analytics on their objects pages.
Creating and Administering Analytics for Sales

Managing Analytics in Work Areas

This figure shows the Refresh, Print, and Export links on an analytic from a tab on the Analytics page.

How to Expose the Refresh, Export and Print Links

To enable the links for refresh, export, and print on analytics from object tabs, you modify the component properties in Page Composer. As always, these changes are done in a sandbox.

To expose the analytic Refresh, Print, and Export links:

1. Highlight the analytics tab and click the Edit Component Properties wrench icon.

   This figure shows the Page Composer option to modify component properties for a analytics tab.

2. In Component Properties dialog, go to View Report Links.

3. In the View Report Links field,, the following values can be entered:
   - Add "r" to expose the Refresh link.
Add "f" to expose the Print link.
Add "d" to expose the Export link.
Add more than one of these options separated by a comma: r,f,d.

This figure shows the View Report Links option.

Setting Up Direct Page Linking for Custom Objects: Worked Example

You can add direct page linking for records in custom objects to provide links to additional details about each individual record in an analysis. When users click the custom object name, or any record with an associated ID value, it opens up a window showing additional drill-down detail for that record.

There are 3 parts to direct page linking:

1. Defining an action link.
2. Constructing the direct link URL.
3. Updating the direct link URL and parameters to navigate to a selected record.

Defining an Action Link

You can add a direct page URL to any column of an analysis created for a custom object by adding an action link from column properties. Note that the analysis must have a column that holds the identification of the record, such as Record ID in the case of a custom object.
To add a direct page link to an analysis:

1. Create or open an analytic that contains a column for the name of the document. Select the gear icon on the column and then from the drop-down list choose **Column Properties**.

   As an example of this, say there is a custom object called Product Docs. For direct page linking, we want to add the direct URL/deep link to the column that holds the identification of the record. In the following figure, since there is a Product Doc column, it would be the Doc Name that holds the ID of that record.

2. In Column Properties, select the **Interaction** tab.

3. Under Value, for Primary Interaction choose **Action Links** from the drop-down list.

4. Click the + icon to add an action link.

   This figure shows the New Action, Navigate to a Web Page option.

5. Click **Create New Action** and then from the drop-down list select **Navigate to a Web Page**.
Constructing the Direct Link URL

You add you specific URL to the action field. This instruction details how to determine the correct URL for your environment. These URLs are examples only.

1. Add the direct link URL to the Create New Action field. There are direct page links patterns available for Oracle Sales Cloud objects which can be found by going to Related Topics at the bottom of this section and clicking Direct Page Links: Explained. In this example, you take the direct URL pattern for the Custom Object, which in this case is called Product Docs. To create a direct link to a default summary page tab for a custom object use the direct link URL pattern in the following example:

   https://<hostname>:<port>/<application>/faces/FuseOverview?
   fndGlobalItemNodeId=CRM_CUSTOM_CARD_<XXXX>&fndTaskItemNodeId=CRM_CUSTOM_TAB_<XXXX>&fnd=3BsubTabName%253DSUMMARY%253BObjectId%253D<YYYY>%253Bfalse%253Bfalse%253B%3B%3B

   Replace XXXX with the custom object’s API name, for example, ProductDocs_c. Obtain the API name from the object overview page (click the object’s node in the Custom Objects tree in Application Composer).

   Replace the YYYY with the custom object’s primary key in the database. In this case, the custom object primary key comes from the Record_Id column, as shown in the following example:

   https://<hostname>:<port>/<application>/faces/FuseOverview?
   fndGlobalItemNodeId=CRM_CUSTOM_CARD_ProductDocs_c&fndTaskItemNodeId=CRM_CUSTOM_TAB_ProductDocs_c&fnd=3BsubTabName%253DSUMMARY%253BObjectId%253D300100057476089%253Bfalse%253Bfalse%253Bfalse%253Bfalse%253B
Note that you can test the URL by replacing the host name with your actual host name and using a valid record value in place of `<YYYY>`. Put the URL in a browser to see if the record details page appears and the URL is valid.

2. Once you have determined that the URL is valid, the next step is to embed this URL in the analytic and ensure that the object ID, represented in these instructions as `<YYYY>` is dynamically retrieved from the analytic whenever the Product Docs name is clicked. When you have added the URL click Define Parameters. The next part of these instructions is to construct the direct link URL.

Updating the Direct Link URL and Parameters to Navigate to a Selected Record

The define parameters fields are populated with some prompts and values already. The purpose of these steps is to ensure that the object ID is defined as a parameter.

This figure shows some Prompt and Value fields on the Create New Action page.

To update the direct link URL and parameters:

1. Because you are changing the value of the ID only, delete the default parameters and leave only one parameter mapped to the ID.
2. Update the first parameter by renaming the Prompt value to ObjectId and set the value to a column value by selecting the record ID from the drop-down list. For example ProductDocs_c.Id.
3. Paste the URL again in the URL field and replace the ID of `<YYYY>` value with `@{1}` as shown in the following example:

   https://<hostname>:<port>/<application>/faces/FuseOverview?
fndGlobalItemNodeId=CRM_CUSTOM_CARD_ProductDocs_c&fndTaskItemNodeId=CRM_CUSTOM_TAB_ProductDocs_c&fnd=%3BsubTabName%253DSUMMARY%253BObjectId%253D@{1}%253B%3B%3Bfalse%3B256%253B

ORACLE
This figure shows the result of the Edit Action page when the correct values are added.

4. Check Hidden.
5. Click Ok.
6. Click OK to edit the Action Link window. The Column Properties window appears.
7. Click the Data Format tab.
8. Check the Override Default Data Format and select Number for Treat Number As.
9. Click OK and save.
10. Select the Results tab. Now the document name column shows the link. When users click the link, they are taken to that record detail in simplified page.
These same steps can be performed for any of the standard objects using the direct link format and embedding links in the BI analyses.

Related Topics

- Direct Page Links: Explained

Adding Paths and Links to Analytics from Work Areas

Your analytics are stored in BI and to get the paths to an analysis, you navigate to BI and check the properties on that analysis. Before you add new infolets in the page, or change existing infolets, it’s best to first get the analysis paths first. Navigating away from the page takes you out of editing mode.

Finding Your Analytics Pathways

To set up the infolet and tile paths:

1. From the Navigator, click Reports and Analytics.
2. Click the directory icon on the Reports and Analytics page.
3. Go to Sales, Embedded Content, and navigate to the analytic.
4. Highlight the analytic you want, right-click and click More.
5. Under your analytic name, click More, then Properties.
6. From the General area, go to Location and copy the path.
The path is your report location for your sales infolets.

7. Click **OK**.
   Repeat the steps 1 through 6 to find your tile analytics.

Drilling down to transaction details using ADF Contextual Event Action

Administrators can set the ADF Contextual Event action on the object name or other attribute columns of an object in the analysis to enable drilling down from the BI analysis to Sales Cloud objects. When building your own analytic, this action has to be set in the analytic. Once set, this analytic can be added on the object tabs, Sales Infolet pages, Sales Pages or Analytic page and the drilling down feature would work. Users can click the column name, for example, Customer Name and can see the detail page for that particular customer.

Several objects are available for drilling down to object details once the ADF Contextual Event is set. The following are the objects available:

- Opportunity
- Contact
- Account
- Activity
- Partner
- Deal
- MDF Budget
- MDF Request
- MDF Claim
- Business Plan
- Business Plan Objective
- Leads

Setting the ADF Contextual Event

You can add this behavior to any analytic you build as long as it has an identifier for the record, in this case the identifier is Customer ID. In this example you are going to build an analytic that shows Account and Opportunity details.

To add the ADF Contextual Event:

1. Create a new analysis from the subject area Sales-CRM Pipeline. (See Chapter 5, Creating and Editing Analytics).
2. From the Subject Area pane, drag the following columns onto the Selected Columns editing palette:
   - From the Customer dimension, select "Name".
   - From the Customer dimension, select "Customer Row ID".
   - From the Opportunity dimension select "Name".
   - From the Opportunity dimension select "Opportunity ID".
   - From the Facts folder, under Pipeline Facts, select "Opportunity Revenue".
3. Click the settings gear icon for Customer Name.
4. Choose **Column Properties**.
5. Choose the Interaction tab.
6. Under Value, Primary Interaction, choose **Action Links**.
7. Click the + icon to add a new action.
8. Click the running man action icon with the + on it. A list of actions comes up.
9. Choose ADF Contextual Event. Click **OK**.

This figure shows the ADF Contextual Event option.

10. In the Column Properties dialog, check **Do not display in a dialog if only one action link is available at runtime**.
This figure shows the ADF Contextual Event action link dialog.

11. Click OK.
12. Repeat steps 3 through 9 for the Opportunity Name column.

Viewing the ADF Contextual Event Action in Sales Cloud

The analytic to which you added the ADF Contextual Event can be added on the Sales Cloud interface. Using the ADF Contextual Event action, users now have the option to view the additional details of a particular object, or make changes to details on an object page.

To set your analytic an edit object page, do the following:

1. Enable the analytic tab on the Accounts page and add the newly created analytic. See the section called "Adding Analytics to Object Pages."
2. Click the Customer Name from the BI report and it opens up the detail page for a particular customer as a dialog box. You can close the dialog box and open up any customer name or opportunity name to get a detail page dialog box.
Adding an Analysis to the Analytics Page

Administrators can configure analyses to show user-specific analytic data on user’s Analytics page. This is done by adding session variables to the analytic in BI. Adding a session variable, such as `USER_PARTY_ID` tells the application to show only the data that is specific to that signed in user. These variables exist for each user for the duration of a browsing session and expire when the user closes the browser or signs out. There are two types of session variable: system and non-system. Session variables are primarily used when authenticating users against external sources such as database tables or LDAP servers. If a user is authenticated successfully, session variables can be used to set filters and permissions for that session.
This figure shows the Analytics work area, which is accessed from the Sales icon on the Home Page.

Adding a Session Variable to an Analysis

Your users view analytics from the home page. And you embed and configure how analytics appear in the work areas. But you create and edit analytics in BI. See the Related Links for a link to information about variables in the Oracle BI Repository.
This figure shows the New Filter option for adding a session variable that shows an analysis for a signed in user.

Related Topics
- Using Variables in the Oracle BI Repository

Adding an Oracle Business Intelligence Report to Oracle Sales Cloud Mobile: Procedure

To view Oracle Business Intelligence Analyses reports in Oracle Sales Cloud Mobile, you must first perform the following configuration tasks from the web application.

1. Navigate to the Application Composer and select the Sales application.
2. Select Mobile Application Setup under the Common Setup list.
3. In the Mobile Application Setup page, select Manage Mobile Reports.
4. Create the report, entering the Oracle Business Intelligence Analyses report details.
5. Add the report to the Mobile Reports Springboard page, or the Mobile Reports Sales Account page, by selecting either Configure Mobile Reports: Springboard or Configure Mobile Reports: Sales Account.
Note that you can add Oracle Business Intelligence Analyses reports, but you can’t add Oracle Business Intelligence Publisher reports.
9 Building Your Own Subject Areas

Custom Subject Areas: Explained

Oracle Sales Cloud contains prebuilt subject areas, but also enables you to create your own subject area for your unique reporting needs. The subject area that you create is called a custom subject area.

Concepts and Terminology in Custom Subject Areas

Before creating a custom subject area, it is important to understand the concepts and terminology used with custom subject areas. These concepts are discussed in their related topics in detail.

- **Objects**: Objects within Oracle Sales Cloud represent an entity; for example, an opportunity.
  - Standard object: An object that is delivered with Oracle Sales Cloud is called a standard object; for example, Opportunity.
  - Custom object: A new object that is added during the deployment of Oracle Sales Cloud is called a custom object.

- **Fields or attributes**: A field, also called an attribute, is where entity information is stored in Oracle Sales Cloud. An opportunity name is stored in a field under the opportunity entity or object.

- **Measures**: Measures are a set of functions that you can apply on date, numeric, or currency type fields of the selected primary, child, or related objects while defining a custom subject area.

- **Date Leveling**: Date leveling is a date hierarchy representation between dates and their associated measures. For example, total revenue by month.

- **Implicit Facts**: An implicit fact column defines the join path that should be used when running a report with only dimension attributes from a subject area that has measures from different facts or entities.

Objects in Custom Subject Areas: Explained

This topic covers how you use the various types of objects in the Application Composer to create custom subject areas. A custom subject area is a set of entities (objects), attributes, and measures that you use to build reports.

Objects can be classified under broad categories of custom objects and standard objects. Every custom subject area has a primary object, which is the focus of any reports that you create. You can also optionally add child objects and related objects to the custom subject area. Custom subject areas support both custom and standard objects. The objects that you create are called custom objects and those delivered with Oracle Sales Cloud are standard objects.

Before designing your custom subject area, use Application Composer to identify or create the objects and fields that you want to use.

Primary Objects

A primary object is any reportable top-level object. You create a custom subject area based on the primary object. Additionally, the primary object is the focus of the report that you create based on the custom subject area.
The list of available primary objects includes all reportable objects, which are either top-level custom objects, or standard objects that are configured as reportable by the owning Oracle Sales Cloud application. After you save your custom subject area, you can’t change its primary object; but you can create another custom subject area using a different primary object.

Note: You can’t include Notes and Tasks in a custom subject area because they are not reportable.

Based on how you want to configure your custom subject area, you can add one child to an object.

Child Objects

A child object is an object that has a one-to-many relationship with a parent object and can be a parent object of another child object. Add a child object to a custom subject area if you want your report to include data from both the primary object and its children. If an object’s parent object is already a child object (of another parent object) then the object is a grandchild object. For example, if object Y is a child of object X, and object Z is a child of object Y, then object Z is a grandchild of object X. Custom subject areas support parent-child-grandchild-great-grandchild objects.

This figure shows the parent-child-grandchild-great-grandchild hierarchy.

You can only add one child object to the primary object per level, as long as there are child objects available. If there are no child objects for the chosen primary object, the list that enables selecting child objects does not appear.

The parent-child-grandchild-great-grandchild hierarchy supports adding up to three levels of child objects with one child object at each level, for example, parent-child1-child1.1-child1.1.1.

Note: Once you publish a custom subject area, you can't add or remove child objects.

Related Objects

A related object is any object with a many-to-one relationship with its parent object. Custom subject areas support objects related to parent, child, grandchild or great-grandchild objects. You can add one or more fields from related objects to a
custom subject area. Related objects are available in custom subject areas as related objects if they are reportable and they are defined as many-to-one in the Relationships component of Application Composer.

For example, when configuring a custom subject area, you can select the Opportunity object, which is a primary object, and then click the Select Fields button. Select Related object, then select a related object from the list.

You can also use the Select Fields dialog box to add or remove opportunity fields, or add or remove related object fields from the custom subject area. Select the fields you want to add or remove, then move them to the appropriate list.

After you publish a custom subject area, you cannot remove related objects; however, you can create another custom subject area and then use the applicable related objects.

**Fields or Attributes in Custom Subject Areas: Explained**

This topic explains the various types of fields or attributes that you use for configuring your custom subject area.

Fields or attributes store entity information in Oracle Sales Cloud. Fields can be standard or custom. Standard fields are delivered with Oracle Sales Cloud, and custom fields are the ones that you create.

**Types of Reporting Fields**

The fields you can use to create reports are as follows:

- Text
- Number
- Date
- Percentage
- Date time
- Currency
- Check box
- Fixed choice list
- Dynamic choice list
- Long text

When you create a custom field, you can create reports for the following data types:

- Boolean

  **Note:** If you are using the Boolean data type for fields other than check boxes, those fields are displayed as either 0 or 1 on your custom reports.

- Number
- Currency
- Date
- String
- Percentage
- Phone
Creating Reports Using Extension Fields

For key objects in Oracle Sales Cloud, predefined extension dimensions exist which include custom or extended fields. These fields enable you to create reports on extensions that are made to standard objects.

Note: Extension dimension fields are not available for reporting until custom fields have been specified.

Here's a summary of the steps for creating a report using extension dimension fields:

1. Using Application Composer, create custom fields for standard objects, and ensure that the custom fields are exposed on the user interface.
2. Publish the sandbox.
3. In the navigator menu, select Reports and Analytics under Tools to navigate to Oracle Business Intelligence (BI) Composer.
4. Select a real time or Oracle Transactional Business Intelligence (OTBI) subject area that includes the predefined extension dimension.
5. Create a report.

When you specify the columns for your report, you can select the extension fields from the extension dimension folder, which appears as the <Object Name> Extension folder. For example, Opportunity Extension.

The extension fields available for reporting vary by object type.

Using Hierarchies in Reports with Custom Subject Areas

Some of the prebuilt subject areas include hierarchical structures, such as customer hierarchy, that enable reporting and aggregating up the hierarchy. You can use these hierarchies in your reporting when you join a custom subject area with these prebuilt subject areas that include hierarchies.

For example, you might create a custom object named Ticket, which includes the Customer field as a dynamic choice list. You then create a custom subject area for Ticket, and create a report using this custom subject area and one of the pre-delivered subject areas that include a customer hierarchy.

You can now report on the hierarchy using aggregations, such as Number of Tickets.

The following hierarchies are supported:

- Resource
- Territory
- Customer
- Partner

For example, you could create a custom object named Ticket, which includes the Account field as a dynamic choice list.

Create a custom subject area for Ticket, then use this custom subject area and one of the pre-delivered subject areas that include a customer hierarchy:

- Create a report using a pre-seeded subject areas such as Sales - CRM Customer and Contacts Real Time that contains the account hierarchy.
- Add the custom subject area to the report to join the two subject areas.
• Add the account hierarchy from the subject area.
• Add the metric, such as Number of Tickets, from the custom subject area.

Measures in Custom Subject Areas: Explained

Measures are a set of functions. Measure columns allow business users to see a summary of how their business processes are working so far. Examples include a SUM of the Revenue in Euros, or a COUNT of the number of Opportunities worth over $500,000. The designer defines the aggregation function (SUM, COUNT, and so on) for custom measures, so end users don’t need to do so themselves when they create an analysis. You can apply these functions on fields of type Date, Numeric, or Currency.

Measures available to a particular type of field may differ depending on the field type. After you define the measures for the required fields and publish the custom subject area, you can select these fields and the applied measures when creating your report in the Oracle Business Intelligence Composer. You can only specify aggregate formulas to apply to a measure when creating a custom subject area. It is not possible to edit a measure in an already published custom subject area.

Here are some measures you can apply to fields of type Numeric, Currency, or Date.

• For Numeric and Currency fields, a measure can be:
  o All

  ✍️ Note: All is not a measure, but an option in the UI that selects all of the measures.

  o Sum: Calculates the sum of the values.
  o Average: Calculates the mean value.
  o Count: Calculates the number of rows that are not null.
  o Count Distinct: Calculates the number of rows that are not null. Each distinct occurrence of a row is counted only once.

  ✍️ Note: Although Count Distinct is usually used in cases requiring a count on a foreign key (because a count of distinct rows is what’s wanted), it is not required. If your requirements allow multiple instances of the same foreign key value to be counted multiple times, you can use Count rather than Count Distinct.

  o Maximum: Calculates the highest numeric value.
  o Minimum: Calculates the lowest numeric value.
  o First: Selects the first occurrence of the item.
  o Last: Selects the last occurrence of the item.
  o Median: Calculates the middle value.
  o Standard Deviation: Calculates the standard deviation to show the level of variation from the average.
  o Standard Deviation Population: Calculates the standard deviation using the formula for population variance and standard deviation.
For Date fields, a measure can be:

- All
- Maximum
- Minimum

You can select measures based on your reporting needs. For example, you can use measures to view product sales per store, state, or country. Or, to view the number of support tickets opened or closed per day, week, or month, and so on.

If you do not define a measure, then one will be automatically created for the subject area when you submit the custom subject area for publication.

Date Leveling in Custom Subject Areas: Explained

Date leveling is a hierarchy representation of dates and associated measures, which enables you to view the data over different periods of time.

To use this hierarchy, create a report that shows the total Opportunity Sales amount for each year. Drill down from year to show sales per quarter, sales per month, sales per week and sales per day, and then drill back up to sales per year. The date hierarchy aggregates the measures by the required hierarchy or leveling period.

To configure date leveling when defining a custom subject area, use the Configure Date Leveling step of the train stop to either allow or disallow leveling. You may need to expand the field list in the Date field to select or clear the Date Leveling check box, as applicable.

For more information on where the Configure Date Leveling step appears in the train stop, see Creating and Editing Custom Subject Areas: Explained.

Creating and Editing Custom Subject Areas: Explained

This topic covers how you create and edit custom subject areas, and how you can activate or inactivate a custom subject area while editing.

You cannot modify a predefined report subject area that is delivered with Oracle Sales Cloud; however, you can create custom subject areas to meet your reporting needs.

Note: Before you create a custom subject area, review all the included subject areas to see if the one you want is already available.

Creating a Custom Subject Area

You create custom subject areas using train stops that appear at the top of the page. These train stops enable you to move back and forth during the configuration process. You can also save your configuration at a logical point and then continue to create later.

Note: You can only create custom subject areas when you are not in an active sandbox.
To create a custom subject area using train stops:

1. Navigate to Application Composer.
2. Click Custom Subject Areas on the Overview page of Application Composer.
3. Select Create from the Actions menu.

Here are the steps in the train stops that you can use for configuring your custom subject area:

1. Define Custom Subject Area

   In this step, you provide the name for your subject area and select the primary object that is the basis for the reports you create later using the custom subject area. Subject areas usually have names or labels that correspond to the type of information they contain, such as service requests and orders. Display labels have the Custom: prefix added automatically.

2. Select Child Objects

   In this step, you select the child objects whose data you want to use in your reports. You can add child objects only if the primary object has child objects. Otherwise, the add icon is disabled. You can only add one child object per level. The parent-child-grandchild hierarchy supports adding up to three levels of child objects with one child object at each level, for example, parent-child1-child1.1-child1.1.1.

3. Configure Fields

   In this step, you select the fields that you want to display on your reports. You typically add at least one field from each of the objects that you have selected for your custom subject area.

   Select the desired measures to generate for number, date, or currency fields from all the available objects so that the subject area includes only those measures that you want to analyze. Also, define at least one measure.

   In the Measure Aggregations column, select an option from the list of predefined formulas that you can apply to the Measure field. When you select the formula, the application applies the selected formulas to the selected field and measures.

   **Note:** You can choose measures only for the lowest child. For example, if only a primary object exists with no children, you can select measures for the primary object. Otherwise, if any child objects exist, you can select measures only at the lowest child object level, not for the parent object.

   You can change the display labels of the fields that you select in this step. Additionally, you can use the Select Fields dialog to remove fields that belong to the primary object, or add fields from the related objects. The Select Fields dialog appears when you click Select Fields when configuring fields for your custom subject area.

   After you publish your custom subject area, the fields you have selected for your subject area are automatically added to their owning object’s folder. If you have also defined measures, those fields are automatically added to the Facts folder. If you did not define a measure, then one is automatically created for the custom subject area.

   For more information on measures, see Measures in Custom Subject Areas: Explained.

4. Configure Date Leveling

   If required, select the Date columns for date leveling. For more information on date leveling, see Date Leveling in Custom Subject Areas: Explained.

5. Configure Security

   Select the required security level for the Everyone Role Name, which is added by default, or add additional Role Names by clicking in the + icon and define the security level for each one of them.
The security definition here only controls who can access the custom subject area definition to create reports. It doesn’t control data visibility which is automatically controlled based on the user running the reports.

For more information on securing custom subject areas, see Securing Custom Subject Areas: How It Works topic.

6. Review and Submit

Review the custom subject area configuration for all added objects, attributes, and measures, and if satisfied, click **Submit**. If changes are required click **Back** to navigate back to the required screen.

This figure shows the custom subject area configuration.

After you submit, the custom subject area configuration is prepared for publishing. You can create and submit a custom subject area either immediately or save and close the custom subject area at any point and submit it later. You must first submit a custom subject area for publishing before you can select it from within Oracle BI Composer. After you save or submit a custom subject area, you cannot modify its primary object.

To access the published custom subject area in BI:

- From the Navigator menu, select **Tools > Reports and Analytics**.
- In the Contents pane, click **Create**.
- Select the published custom subject area and start creating your report.
Editing Custom Subject Areas

You can edit a published or saved custom subject area and then republish it when your changes are done. Modifying a custom subject area does not affect the reports that you had created using that custom subject area before making the changes. You can use the modified custom subject area if you need to enhance existing reports.

To edit a custom subject area:

1. On the Overview page of the Application Composer, click **Custom Subject Areas**.
2. Locate the custom subject area that you want to edit, and click the Edit icon.

   You can filter out inactive custom subject areas in Application Composer by viewing custom subject areas in Active status. This is safer than deleting them, because the inactive subject areas are still available and can be found by searching.

3. Make the desired changes and then click **Submit** to republish the custom subject area.

While you can edit a custom subject area in any status, there are considerations on what you can or can't do when editing. When editing a published custom subject area, it is not possible to:

- Change the primary object.
- Add or remove child objects.
- Remove previously added measures.
- Add more aggregation types for measures that are already published.

**Note:** You cannot modify a predefined report subject area that is delivered with Oracle Sales Cloud. Instead, you must create separate custom subject areas to meet your reporting needs. Before you create a custom subject area, be sure to review all the included subject areas to see if the one you want is already available.

Activating or Inactivating Custom Subject Areas

When editing custom subject areas, you can activate or inactivate custom subject areas when your reporting or business requirements change. This step enables you to control what information is displayed on the reports that use the information from custom subject areas.

You can inactivate only those custom subject areas that are published and have a status of OK, and can activate only previously inactivated custom subject areas.

To inactivate a custom subject area, select it in the list and then click the **Inactivate** button. To activate an inactive custom subject area, select it and click **Activate**. Note that if no custom subject area is selected in the list, the button doesn’t appear.
This graphic shows an active custom subject area selected, and the Inactivate button.

When searching for custom subject areas, you can filter out inactive custom subject areas in Application Composer by viewing only those in Active status. Inactivating a custom subject area is safer than deleting it, because the inactive subject areas are still available and can be found by searching.

Securing Custom Subject Areas: How It Works

You can secure a custom subject area by granting or revoking access rights from the role names that access the custom subject area. This topic covers how you can add or delete role names, or grant or revoke access rights from those role names.

You can also add role names from a predefined list and assign or revoke permissions.

Managing Role Names and Access Rights

While defining a custom subject area using the train stops, you can use the Actions list in the Configure Security step to manage role names and access rights as follows:

- Select and add role names for a custom subject area from a predefined list of role names. This predefined list also provides the description for each role name. You can also select and add multiple role names from this predefined list using either the Shift or Ctrl keys. Once you add a new role name, you can select appropriate access for that role name.

- Select and delete role names listed for a custom subject area. You can also select and delete multiple role names using either the Shift or Ctrl keys.

   Note: You cannot delete the role name listed as Everyone.

- Read access is granted by default to each role name you add. If you want to revoke Read access from a listed role name, select No access for that role name.

   Note: You can create custom subject areas even for the objects in which you do not have access to the data, which allows you to build custom subject areas without compromising data security.
Publishing Custom Subject Areas: Explained

This topic covers what happens when you submit a custom subject area for publishing, and what the submission statuses indicate.

After you successfully publish your custom subject area, you can start building reports using Oracle Business Intelligence (BI) Composer based on your published subject area.

What Happens When You Submit for Publishing

When you submit a custom subject area for publishing, two processes occur in the background. The first process is synchronous and creates Oracle Applications Development Framework (Oracle ADF) artifacts. You must wait until this first process is over. The second process is asynchronous and creates centralized metadata repository (RPD) fragments and submits them to the Oracle BI server.

Note: You must refresh the status to know whether the custom subject area is submitted successfully. You may have to refresh the status multiple times, because the creation of Oracle ADF and RPD artifacts may require some time.

A custom subject area can have one of the following statuses:

- Pending: This status indicates either of the following:
  - You saved and closed the configuration process for a custom subject area before submitting it for publishing.
  - A failure occurred in the background processes when creating Oracle ADF and RPD artifacts.

- In Process: This status indicates that the data is in the process of being published to Oracle BI.

Note: If the in-process status doesn’t change to OK, even after multiple refresh attempts, then there could be an error in publishing. If an error occurs, then the details are displayed, as well as information about how to fix problems, where applicable. These error status details allow you to pinpoint and fix problems quickly.

- OK: This status indicates that the custom subject area has been published successfully. You can use Oracle BI Composer to create reports using the objects, attributes, and measures that you have configured in the subject area.

Associating Custom and Standard Objects and Creating Reports: Worked Example

This example illustrates how to create a custom object and associate it with a standard object using a custom Choice List (Dynamic) field, and then create reports using both objects.

In this example, for each opportunity record, you want to include the option to associate the name of the partner who won that opportunity. Doing this lets you create a report showing a summary of selected opportunities (for example, all won opportunities in the previous quarter) along with the name of the winning partner for each opportunity.
This example covers:

1. Creating a custom object called Winning Partner.
2. Associating the Winning Partner object with the Opportunity object using a custom Choice List (Dynamic) field.
3. Creating a custom subject area using data from both the custom Winning Partner object and the standard Opportunity object.
4. Creating a report using the custom subject area.

Creating a Custom Object

In this step, you create a custom object called Winning Partner.

⚠️ Note: Before making any application changes in Oracle Sales Cloud, you must have a sandbox session active. For more information on sandboxes and how to use them, see Sandboxes: Explained.

To create a custom object:

1. Navigate to Application Composer.
2. Click the create icon for custom objects.
3. Configure the custom object as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Enter or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Label</td>
<td>Winning Partner</td>
</tr>
<tr>
<td>Plural Label</td>
<td>Winning Partners</td>
</tr>
<tr>
<td>Record Name Label</td>
<td>Partner Name</td>
</tr>
<tr>
<td>Record Name Data Type</td>
<td>Text</td>
</tr>
<tr>
<td>Object Name</td>
<td>WinningPartner</td>
</tr>
</tbody>
</table>

4. Click OK.
5. In the left pane, expand the Winning Partner node, and click Fields.
6. On the Fields page, select the Standard tab to view the standard fields that are automatically created for the new custom object. You can optionally add custom fields on the Custom tab.
7. Next, click Pages under the Winning Partner node.
8. On the Simplified pages tab, click Create Default Pages.
10. Click the Edit icon next to Summary Table.
11. Notice that under Configure Summary Table, Partner Name is specified as the Drill Down Column, and is included automatically in the Selected Fields list.
12. Click Cancel, then click Done.
13. Under Creation Page Layouts, copy the standard layout and edit it.
14. Click the Edit icon next to Winning Partner Create.
15. Under Configure Details Form, notice that Partner Name is included in the Selected Fields list by default.
16. Click Cancel, then click Done.

Associating the Winning Partner Object with the Opportunity Object

In this section, you create a custom Choice List (Dynamic) field for the Opportunity object using the Winning Partner object.

To create a custom dynamic choice list:

1. Navigate to Application Composer.
2. Expand the Standard Objects tree in the left pane.
3. Expand the Opportunity node, and select Fields.
4. Under the Custom tab, select Actions > Create.
5. In the Select Field Type dialog, select Choice List (Dynamic) and click OK.
6. In the Create Dynamic Choice List: Basic Information page, specify the following:

<table>
<thead>
<tr>
<th>Fields</th>
<th>Enter or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display Label</td>
<td>Winning Partner</td>
</tr>
<tr>
<td>Name</td>
<td>Winning</td>
</tr>
<tr>
<td>Updatable check box</td>
<td>Select</td>
</tr>
<tr>
<td>Include in Service Payload check box</td>
<td>Select</td>
</tr>
</tbody>
</table>

7. Click Next.
8. Under List Data Source, specify the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related Object</td>
<td>Winning Partner</td>
</tr>
<tr>
<td>List Selection Display Value</td>
<td>Partner Name</td>
</tr>
</tbody>
</table>

9. Click Submit.

You have now defined a relationship between the Winning Partner custom object and Opportunity standard object.

10. Test your application changes to ensure they work properly, and then publish your sandbox.

Creating a Custom Subject Area

In this step, you create a custom subject area to enable reporting on Opportunity and Winning Partner objects.

To create a custom subject area:

1. If you are working in a sandbox, exit the sandbox.
2. Navigate to Application Composer.
3. Click **Custom Subject Area** in the Overview region.
4. Select **Actions > Create**.
5. In the Define Subject Area step, specify the following:

<table>
<thead>
<tr>
<th>Field</th>
<th>Enter or Select</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Label</strong></td>
<td>Opportunity Winning Partners</td>
</tr>
<tr>
<td><strong>Primary Object</strong></td>
<td>Opportunity</td>
</tr>
</tbody>
</table>

6. Click **Next**.
7. Click **Next**.
8. In Configure Fields step, click **Select Fields**.
   In the Select Fields dialog:
   a. Select the Related object option.
   b. Select the WinningPartner_c custom object.
   c. Move the Record ID and Partner Name fields to the Selected Fields box.
   d. Click **OK**.
9. Select the desired measures.
10. Click **Next**.
11. Select the Date Leveling check box for the Date fields.
12. Accept the default Role Name security settings.
13. Click **Next**.
14. Review the custom subject area configuration.
15. Click **Submit**.
   Wait until you see the page that shows the status of the custom subject area in a table. You may have to refresh the page until the status changes to **OK**.

## Configuring a Report Using the Custom Subject Area

In this section, you create a report using the published custom subject area and then view the report.

You create a report using a guided process, wherein you can specify the fields and measure that you want to display.

To create a report:

1. In the Navigator menu, click **Reports and Analytics** under **Tools** category.
2. Click **Create**.
3. Under **Select Subject Area**, locate and select the published **Custom: Opportunity Winning Partners** custom subject area.
4. Use the guided process to configure your report as follows:
   a. In the Select Columns step, open each folder and select the data you want on your report.
   b. Click **Next**.
   c. In the Select Views step, enter a **Title** for your report, and specify the view options for Table, Graph, and Layout.
Extensibility and Reporting: Example

In this example, you first add an attribute to a standard object and see how that attribute becomes automatically reportable. You then create a custom subject area using this attribute and create a report.

Adding an Attribute to a Standard Object

In this example, you add a custom, fixed-choice field called *Strategic Value* to the Opportunity object.

1. Navigate to *Application Composer*.
   
The main page of Application Composer appears. You add an attribute to a standard object.
2. In the Objects region on the left, locate the Opportunity object.
3. Click the *Expand* button of the Standard Objects tree.
4. Under the Standard Objects tree, click the *Expand* button of the Opportunity tree item.
5. Click the *Fields* link under the Opportunity tree item.
6. In the Custom tab, click the *Create* button.
7. In the Select Field Type dialog, click the *Choice List (Fixed)* option, then click *OK*.
8. In the Appearance region, enter “Strategic Value” in the *Display Label* field.
9. Enter “Select whether the deal is strategic” in the *Help Text* field.
10. In the List of Values region, click the *Search and Select Lookup Type* button.
11. In the Search and Select: Lookup Type dialog, search for existing *Yes/No* fields.
    
    In the Search region, enter “Yes” in the *Meaning* field.
12. Click *Search*.
13. In the search results, click the *Yes / No Lookup Type* cell.
14. Click *OK*. 
You are back to the Create Fixed Choice List page. You will now set a default value for a new deal.

15. In the Default Value region, click the **Fixed Value** list.
16. Click the **No** list item.
17. In the upper right region of the page, click the **Save and Close** button.

You have added an attribute to a standard object.

**Viewing Added Attribute as Reportable at Runtime**

In this example, you view the attribute that you added to the Opportunity object, which is now reportable in the related subject area at run time.

1. Click the **Navigator** menu.
2. Click the **Reports and Analytics** link.

> **Note:** You might need to click the more >> link first.

You are on the Reports and Analytics page. Use the toolbar in the left pane to navigate to Oracle Business Intelligence Answers.

3. Click the **Browse Catalog** button.

You are on the Oracle Business Intelligence Answers page. Use the Folders pane on the left to navigate to the extensions created for the Opportunity object.

4. Double-click the Shared Folder tree.
5. In the Shared Folders tree, double-click the **Sales** tree item.
6. In the Sales tree item, double-click the **Subject Area Contents** tree item.
7. In the Subject Area Contents tree item, select **Sales - CRM Pipeline**.
8. In the main area of the page, click the **Edit** link under Pipeline.

The left pane lists the standard and extended objects used for the Sales - CRM Pipeline subject area.

9. Locate the Opportunity Extension tree item to see the attribute you added.
10. Double-click the Opportunity Extension tree item.
11. In the Opportunity Extension tree item, locate the **Strategic Value** field.

You verified that a custom attribute is reportable at run time.

**Creating a Custom Subject Area**

In this example, you create a custom subject area using the Opportunity object.

1. If you are working in a sandbox, exit the sandbox.
2. Click the **Navigator** menu at the top.
3. Click the **Application Composer** link.

> **Note:** You might need to click the more >> link first.
You are on the main page of Application Composer, where you create a custom subject area using the opportunity object.

4. In the Overview region, click the **Custom Subject Areas** link.

You are on the Custom Subject Areas page. You can use this page to search or create custom subject areas.

5. In the Search Results region, click the **Create** button.

6. Enter a name for the custom subject area that you are creating. Enter "Opportunity_Contact" in the **Label** field.

7. In the Primary Object region, click the **Primary Object** list.

8. Click the **Opportunity** list item.

9. In the upper-right region of the page, click the **Next** button.

10. In the upper-right region of the page, click the **Add Child Object** button.

11. In the Add Child Object dialog box, click the **Child Object** list.

12. Click the **OpportunityContact** list item.

13. Click **OK**.

14. In the upper-right region of the page, click **Next**.

You now define measures for date and numeric fields for the Opportunity primary object. You don’t need measures applied to all Date and Numeric fields, which is currently selected by default, so you first remove the default selection, then add measures to the fields you require for your custom subject area.

15. Ensure that the selected value in the **Fields From** list is **Opportunity**. Click the **Actions** menu.

16. Click the **Deselect All Dates as Measures** menu item.

This action will deselect all measures selected by default for the Date fields.

17. Click the **Actions** menu.

18. Click the **Deselect All Numerics as Measures** menu item.

This action will deselect all measures selected by default for Numeric fields.

19. You now specify the fields you want to apply measures to. Click the **Measure** option for the **Revenue** field.

In this activity, you won’t be applying measures for fields in the OpportunityContact child object.

20. In the upper-right region of the page, click **Next**.

21. You now select fields to apply date leveling. In the **Date Field Leveling** table, click the **Expand** button of the Opportunity object.

22. Select the **Allow Leveling** option for the **RevenueEffectivedate** field.

23. In the upper-right region of the page, click **Next**.

24. Leave the default role access of **Read** for Everyone. In the upper-right region of the page, click **Next**.

25. Review your custom subject area. In the upper-right region of the page, click **Save**.

26. In the upper-right region of the page, click **Submit**.

A confirmation message appears.

27. Click **OK**.

You successfully created a custom subject area.

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### Creating a Report Using a Subject Area

In this example, you create a report in Oracle Business Intelligence Composer (BI Composer) using the Sales - CRM Pipeline subject area.

1. Click the **Navigator** menu at the top.
2. Click the **Reports and Analytics** link under Tools.

   **Note:** You might need to click the more >> link first.

   The Reports and Analytics page appears.

3. In the left pane, click **Create**.

   From the Select Subject Area dialog box that appears, you must first select a subject area to build your report. In this activity, you are building a report using the **Sales - CRM Pipeline** subject area.

4. In the Select Subject Area dialog, click the **Sales - CRM Pipeline** link.

   **Tip:** You can add more than one subject area to a report by clicking the Add/Remove Subject Areas icon in the top right corner of the subject area list. You can include both standard and custom subject areas in the same report.

5. You are in the Select Columns step of Oracle Business Intelligence Composer (BI Composer) wizard. In the left box, click the Expand button of the Employee tree.

6. Add the following fields to the **Selected Columns** box on the right:
   a. Employee Name under Employee tree.
   b. Opportunity Name under Opportunity tree.
   c. Sales Stage Name under Opportunity tree.
   d. Status under Opportunity tree.
   e. # of Opportunities from Pipeline Facts tree.

7. In the upper-right region of the page, click **Next**.

   You are in the Select Views step of the wizard.

8. Enter "Opportunity Count By Sales Stage" in the **Title** field.

9. Click the **Graph** list.

10. Click the **Bar (recommended)** list item.

11. Click the **Preview** option on the right of the **Title** field.

12. In the upper-right region of the page, click the **Next** button.

   You are in the Edit Graph step of the wizard.

13. From the **Group By** box, exclude the fields you do not want in your report. Notice how the **Preview** changes.

14. In the **Group By** box under the Graph Layout area, click the **Opportunity Name** option.

15. Click the Move To list adjacent to the Group By heading.

16. Click the **Excluded** list item.

17. In the Group by box, click the **Employee Name** option.

18. Click the Move To list adjacent to the Group By heading.

19. Click the **Excluded** list item.

20. In the upper right region of the page, click **Next**.

21. You are in the Sort and Filter step of the wizard. In this step, you will select the following filters for your report:
   o Sales Stages to display in your report
   o The Customer for which these Sales Stages should be displayed.

22. In the Filter region, click the **Add Filter** list.

23. Click the **Sales Stage Name** list item.

24. Click the **Operator** list of the Sales Stage Name filter.

25. Click the **is in** list item.

26. Click the **Value** list of the Sales Stage Name filter.
Select these options:
  o 02 - Negotiation
  o 07 - Closed
  o Short List
  o Solution Presentation

27. In the Filter region, click the Add Filter list to add another filter.
28. Click the More Columns list item.
   You are on the Select Column dialog box.
29. In the dialog, click the Expand button of the Customer tree.
30. In the Customer tree, click the Customer Name tree item.
31. Click OK.
   You are back to the Sort and Filter step.
32. In the Filter region, click the Operator list of the Customer Name filter.
33. Click the is in list item.
   You will now search for a customer name.
34. Click the Search button adjacent to the Value list of the Customer Name filter.
   You are on the Select Values dialog.
35. Ensure that the Name field contains begins with value. Enter "Pinnacle" in the Search Criteria field.
36. Click the Search button.
37. Click the Pinnacle Technologies item in the Available box.
38. Click the Move selected items to other list button in the middle.
39. Click OK.
40. In the upper right region of the page, click Next.
   You are in the Save step of the wizard.
41. Enter "Opportunity Count By Sales Stage" in the Report Name field.
42. In this activity, you will save your report in only My Folders. In the Save In area, click the My Folders tree.
43. In the upper right region of the page, click Submit.
   A confirmation message appears.
44. Click OK.
45. You can now view the report you just created. Click the Expand button of the My Folders tree.
46. Locate the report you just created.
   You successfully created a report in BI Composer using CRM - Sales Pipeline subject area.

Custom Subject Areas: Frequently Asked Questions

Can I change a custom subject area's primary object?

No. Once you save a custom subject area, you cannot change its primary object; however, you can create a new custom subject area with a different primary object.
Related Topics

- What’s a primary object?

What happens if I change a custom subject area after it is published?

You can edit a published custom subject area and then republish it after your changes are done. Modifying a custom subject area does not affect the reports that you created using that custom subject area before making the changes. You can use the modified custom subject area should you need to enhance existing reports.

Note: You cannot edit a primary object when you modify a custom subject area. Should you need to do so, create a new custom subject area using a different (new) primary object.
10 Sales Cloud Prebuilt Analytics

Overview of Prebuilt Analytics

Sales Cloud comes with a variety of different prebuilt analytics that you use and embed for your analytics users. You can use the prebuilt analytics as they are, or you can make a copy and modify them to meet your specific business analytic requirements. You can get a complete listing of prebuilt analytics at: http://www.oracle.com/webfolder/technetwork/docs/reports/r13/Sales-Reports-R13.xls. You can also link directly to the spreadsheet in the Related Topics section.

Related Topics
- Sales Cloud analytics listing in downloadable format.
- Setting Up the Sales Page Analytics
- Enabling the Sales Infolet Pages

Using Incentive Compensation Analytics

IC Business Intelligence Reports: Explained

This topic identifies and describes the standard business intelligence reports for Oracle Sales Cloud Incentive Compensation. See the Oracle Sales Cloud Analytics and Reports documentation for details on how to create and use reports.

Report Descriptions

The following table describes the business intelligence reports delivered with Incentive Compensation. It also identifies the dashboard that contains the report.

<table>
<thead>
<tr>
<th>IC Report</th>
<th>Description</th>
<th>Incentive Compensation Dashboard</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned Disputes by Type</td>
<td>View the number of disputes with a given type.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Attainment Comparison</td>
<td>Assess participants’ performance against attainment goals and earnings targets.</td>
<td>Participant Manager</td>
</tr>
<tr>
<td>Attainment Details</td>
<td>Audit transaction processing and research attainment disputes.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Attainment Versus Goal Report</td>
<td>Assess participant attainment against performance goals.</td>
<td>Participant</td>
</tr>
<tr>
<td>Balances</td>
<td>View a participant’s payment balances summarized by period.</td>
<td>Commission Statement</td>
</tr>
<tr>
<td>IC Report</td>
<td>Description</td>
<td>Incentive Compensation Dashboard</td>
</tr>
<tr>
<td>-----------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>Commission Statement Participant Details Report</td>
<td>View the participant context for a commission statement, including: the participant name, worker number, and business unit.</td>
<td>Commission Statement</td>
</tr>
<tr>
<td>Commission Statement Attainment Summary Report</td>
<td>Assess participant attainment toward goals.</td>
<td>Commission Statement</td>
</tr>
<tr>
<td>Commission Statement Payment Summary Report</td>
<td>View a participant's payment balances summarized by period.</td>
<td>Commission Statement</td>
</tr>
<tr>
<td>Compensation Cost of Sales by Month</td>
<td>Assess incentive plan effectiveness by month.</td>
<td>Plan Effectiveness</td>
</tr>
<tr>
<td>Compensation Cost of Sales by Plan</td>
<td>Assess incentive plan effectiveness by viewing compensation in proportion to performance. This information helps to determine the return for each compensation dollar invested, rather than the absolute cost of compensation.</td>
<td>Plan Effectiveness</td>
</tr>
<tr>
<td>Compensation Cost of Sales by Quarter</td>
<td>Assess incentive plan effectiveness by quarter.</td>
<td>Plan Effectiveness</td>
</tr>
<tr>
<td>Compensation Plan Assignment</td>
<td>View the compensation plans assigned to a participant.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Compensation Plan Summary Report</td>
<td>View plan details, including plan name, effective start and end dates, and earnings and target incentive amounts.</td>
<td>Commission Statement</td>
</tr>
<tr>
<td>Credit Details</td>
<td>View credit details, including transaction and credit amounts as well as split percentage.</td>
<td>Participant</td>
</tr>
<tr>
<td></td>
<td>Participant Manager</td>
<td></td>
</tr>
<tr>
<td>Credits</td>
<td>View credited transactions for a selected period, including credit category, transaction amount, credit split, and credit amount.</td>
<td>Participant</td>
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<tr>
<td></td>
<td>Participant Manager</td>
<td></td>
</tr>
<tr>
<td>Dispute Status and History</td>
<td>Access a participant’s dispute history.</td>
<td>Analyst</td>
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<tr>
<td>Earning Comparison</td>
<td>Assess participants’ earnings against target incentives.</td>
<td>Participant Manager</td>
</tr>
<tr>
<td>Earnings Summary</td>
<td>Assess a participant’s earnings toward target incentive.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Earnings Versus Target Incentive Report</td>
<td>Assess participant earnings against target incentives.</td>
<td>Participant</td>
</tr>
<tr>
<td>IC Report</td>
<td>Description</td>
<td>Incentive Compensation Dashboard</td>
</tr>
<tr>
<td>-----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------</td>
</tr>
<tr>
<td>Earnings, Year to Date, Target Incentive</td>
<td>Compare a participant’s year-to-date earnings with target incentives for a single plan component or all components.</td>
<td>Participant</td>
</tr>
<tr>
<td>Event Based Payment Details Report</td>
<td>View payment details where transactions were calculated per event.</td>
<td>Commission Statement</td>
</tr>
<tr>
<td>Interval Based Payment Details Report</td>
<td>View payment details where transactions were calculated per interval.</td>
<td>Commission Statement</td>
</tr>
<tr>
<td>Investment Matrix by Product</td>
<td>Assess the revenue to compensation ratio for different products and services to understand if sales behavior is aligned with strategy for different products and services.</td>
<td>Plan Effectiveness</td>
</tr>
<tr>
<td>Participant Detail</td>
<td>View a history of key participant details including business unit, cost center, and currency.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Pay Group Assignment</td>
<td>View the pay groups assigned to a participant.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Payment Balance and History</td>
<td>Review a participant’s payment balances summarized by period.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Payment Plan Assignment</td>
<td>View the payment plans assigned to a participant.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Payments</td>
<td>View a breakdown of payments for one or more periods by plan component, adjustments, and recovery amounts.</td>
<td>Analyst</td>
</tr>
<tr>
<td>Performance Distribution</td>
<td>View the number of participants within a given attainment range, by period.</td>
<td>Participant Manager</td>
</tr>
<tr>
<td>Plan Components</td>
<td>View a summary of payments by plan component.</td>
<td>Commission Statement</td>
</tr>
<tr>
<td>Sales Investment Matrix by Plan</td>
<td>Assess the revenue to compensation ratio for different plans and determine if sales behavior aligns with strategy for different plans.</td>
<td>Plan Effectiveness</td>
</tr>
<tr>
<td>Sales Investment Matrix by Product</td>
<td>Assess the revenue to compensation ratio for different products and services to understand if sales behavior aligns with strategy for different products and services.</td>
<td>Plan Effectiveness</td>
</tr>
</tbody>
</table>
IC Report | Description | Incentive Compensation Dashboard
---|---|---
Year-to-Date Earnings and Payment Summary | View by period your payments year to date and a breakout of earnings and draws, | Plan Effectiveness

Report Dashboard Locations

Incentive compensation managers and analysts can view the Analyst dashboard in the Reports and Analytics pane of the Participant Snapshot work area. Managers can also view the Plan Effectiveness dashboard in the Reports and Analytics pane or using the Oracle Business Intelligence Catalog. In the Participant Snapshot work area, you must first search for and drill into a participant to set context, before you can view dashboard data.

Participant and Participant Manager dashboards are available in the Reports and Analytics pane of the Sales Compensation work area. Participants don’t see any data if they view the Participant Manager dashboard as they don’t have the requisite permissions.

The Commission Statement dashboard is designed for participants. The dashboard is delivered as part of the business intelligence catalog, which you can open from the Reports and Analytics pane. You can add the dashboard to the Sales Compensation work area, as appropriate.

Related Topics

- IC Business Intelligence Subject Areas: Explained
Glossary

**analysis**
A selection of data displayed in one or more views, such as a table or chart, to provide answers to business questions.

**analytics**
Business intelligence objects such as analyses and dashboards that provide meaningful data to help with decision making.

**attainment**
Indicates the participant’s achievement against a specified target, for a specified performance measure. Typically, add qualified credit transactions to get an attainment total expressed in any unit of measure, such as amount or percent. Example: Attained sales of 200,000 USD this month on a target of 250,000 USD.

**business intelligence catalog**
The repository where all business intelligence objects, including analyses, reports, briefing books, and agents, are stored. The catalog contains separate folders for personal, shared, and modified objects.

**collect transactions**
Move transaction data from the staging table to the CN_CP_TRANSACTIONS_ALL table after checking for duplicates, validating data, and converting currencies.

**credit transaction**
Created by the crediting process. When transaction attributes match credit rule criteria, the process generates one or more credit transactions. Incentive processing uses credit transactions to create rollup transactions as well as to calculate commission, bonus, and other types of incentives.

**dashboard**
A collection of analyses and other content, presented on one or more pages to help users achieve specific business goals. Each page is a separate tab within the dashboard.

**data model**
The metadata that determines where data for a report comes from and how that data is retrieved.

**draw**
Provides a participant a minimum amount of money per month, normally for the first few months after the person joins the company. You can recover the draw, typically month to month, against future earnings.

**incentive compensation business unit**
A central center that administers incentive compensation for a group of participants. Associate participants within a single business unit with different business organizations or countries.
incentive compensation transaction
Any transaction for which the application collects the individual line items and uses them when calculating commissions, bonuses, and nonmonetary incentives. Also, create transactions manually. Examples are order, invoice, credit memo, charge back, and payment collected against an invoice. The type or source has no restrictions.

incentive plan component
Defines the computational requirements that the calculation process uses as well as stores information on how to compute the earning. It defines what performance measures to use in computation and an incentive formula to calculate the compensation earnings.

job definition
The metadata that determines what a job does and what options are available to users when they submit the scheduled process. A job is the executable for a scheduled process.

participant
A person or organization (for example, an employee, salesperson, party, supplier contract, partner, or third-party resale contractor) whose credits, attainment, earnings, disputes, and payments the application computes and manages.

participant home currency
Defines which currency to use for each participant.

pay group
Defines the frequency of payments and gathers participants that are on the same payment cycle and sent to the same application. Example: You might group monthly participant payments as Pay Group A for your payables application and Pay Group B for your payroll application.

payment batch
Associated with pay groups and paysheets, defines the compensation period, for example, Feb 2015 or fourth quarter, for which the payment is valid. The payment batch also determines payment amounts for each eligible participant.

payment plan
Contains rules regarding payment draw, draw recovery, and cap amounts to pay to associated participants. The payment process uses the plan to compute participant payment adjustment amounts against earnings for the period.

performance measure
An indicator that tracks participant progress toward a defined organizational goal or outcome as well as a metric for which you compensate your participants.

prompt
A parameter that you set when you use analytics, limiting the data in the analysis or in all analyses on the dashboard or dashboard page (tab).
**report**
An output of select data in a predefined format that’s optimized for printing.

**role**
Controls access to application functions and data.

**scheduled process**
A program that you run to process data and, in some cases, generate output as a report.

**subject area**
A set of columns, or pieces of data, related to a specific business object or area.

**view**
A specific way to present the results of an analysis, for example as a table or graph. Other types of views, such as the title view, show other components of the analysis.

**work area**
A set of pages containing the tasks, searches, and other content you need to accomplish a business goal.