Oracle Fusion Cloud Sales Automation

How do I get started with Express Reports?

Oracle Fusion Cloud Sales Automation
How do I get started with Express Reports?

F93327-03

Author: Jiri Weiss

Contents

Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Some application pages have help icons to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

Use *Cloud Customer Connect* to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest *ideas* for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program*. Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 About the Express Reports Playbook

How to Use the Express Reports Playbook

Use this playbook to learn how to use the Express Reports tool in Oracle Fusion Sales in the Redwood user experience.

Prerequisite Setup

This playbook assumes that you've set up the main features of Oracle Fusion Sales in the Redwood user experience. These main features include users, accounts, contacts, leads, opportunities, sales catalog, sales territories, and so on.

How the Express Reports Playbook Is Organized

The playbook contains 3 chapters:

- **About Express Reports**

  Provides an overview of the tool and Express Report security.
- **Provide Access to Express Reports**

  Explains how to provide access to custom job roles and what to do if you're a customer that has used Express Reports prior to release 23D.
- **Use Express Reports**

  Explains how salespeople, sales managers, and sales administrators use Express Reports.

2 About Express Reports

Express Reports

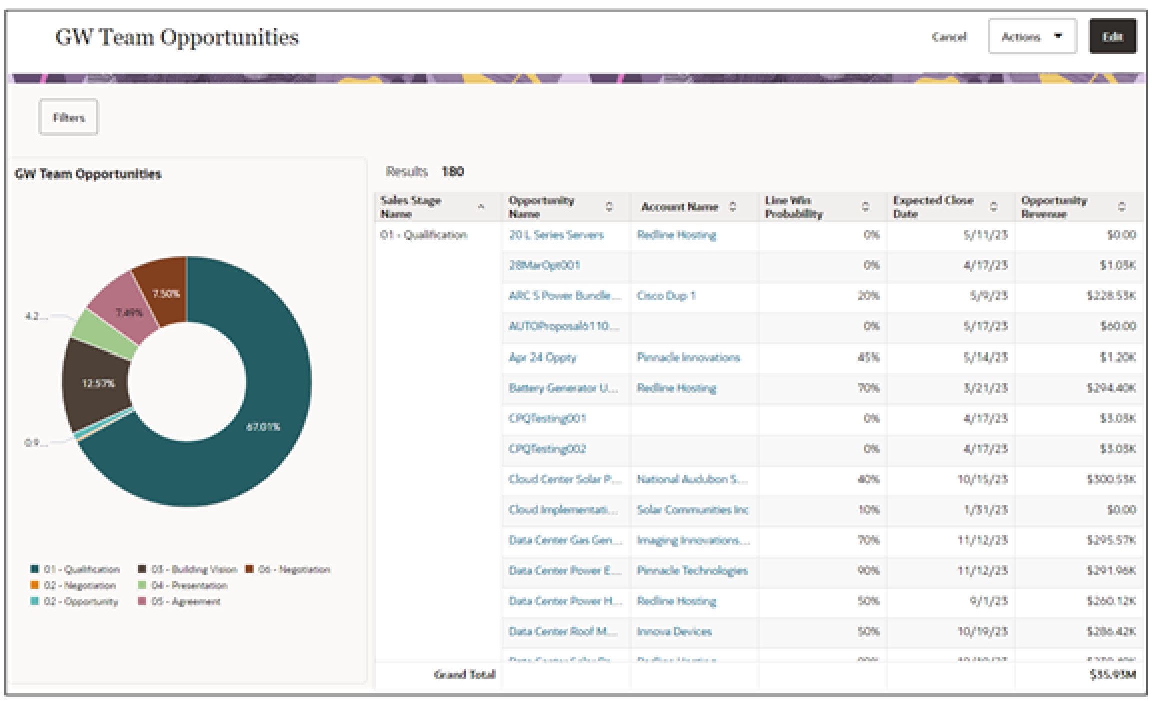
The Express Reports tool simplifies the creation of reports with charts for sales managers, salespeople, and sales administrators. The tool provides the power of Oracle's powerful analytics technology without requiring users to understand the details. Express Reports are available for accounts, opportunities and their revenue lines, and custom objects.

With Express Reports, the sales organization can:

- Quickly build trend analysis reports on large sets of historical data.
- Include predefined metrics in reports to easily see trends, such as win-loss trends in the pipeline, and other key performance indicators.
- Group data by several factors. Group revenue by product and state, for example.
- Take advantage of prebuilt visualizations to display the trends and key performance indicators.

Salespeople and sales managers can build their personal reports. Sales administrators can build and share reports with the whole organization.

Here's an image of a sample express report with a chart of team opportunities by sales stage.



Report Types

When you create an express report, you must first select a Report Type. Report types provide templates for your reports. A report type specifies which Oracle Transactional Business Intelligence (OTBI) subject area you're using for the report and includes the most important columns and attributes for your report.

Oracle provides 4 predefined report types:

- Accounts
  Create reports and visualizations for accounts. For example, you can create a report of active accounts with their potential next year's revenue.
- Opportunities
  Create reports and visualizations related to opportunity revenue, such as win/loss and pipeline trends.
- Opportunities and Contacts
  Create reports and visualizations on opportunities and their contacts. For example, you can create a report of contacts by opportunity and customer state.
- Opportunities and Products
  Create reports and visualizations on opportunities and their products.

Sales administrators can:

- Create additional report types for custom objects.
- Add custom fields they created and published in Application Composer to the report types provided by Oracle.

Express Report Security

What reports users can access, what actions they can take, and what data those reports contain depends on 3 different levels of security.

Users need:

- Functional privileges to view and use the Express Reports work area itself.
- Access to individual reports.
- Access to the sales data in the reports.

Functional Privileges to View and Take Actions in the Express Reports Work Area

To access and take actions in the Express Report pages, you must provision users with the functional privileges listed in the following table. The appropriate privileges are already included in the job roles provided by Oracle for sales and partner job roles.

Privilege	Description	Job Roles
Manage Express Report Definitions (ORA_ZCA_MANAGE_SRT_REPORT_DEFS_CONFIG_PRIV)	Create, update, and delete express reports.	• Channel Account Manager • Channel Sales Manager • Channel Operations Manager • Customer Relationship Management Application Administrator

Privilege	Description	Job Roles
		• Partner Administrator • Partner Sales Manager • Partner Sales Representative • Sales Administrator • Sales Manager • Sales Representative • Sales VP
Manage Express Report Types (ORA_ZCA_MANAGE_SRT_REPORT_TYPES_CONFIG_PRIV)	Create additional express report types for custom objects using custom subject areas.	• Customer Relationship Management Application Administrator • Sales Administrator
View Express Report Definitions (ORA_ZCA_VIEW_SRT_REPORT_DEFS_DATA_PRIV)	View express reports.	• Channel Account Manager • Channel Sales Manager • Channel Operations Manager • Customer Relationship Management Application Administrator • Partner Administrator • Partner Sales Manager • Partner Sales Representative • Sales Administrator • Sales Manager • Sales Representative • Sales VP
View Express Report Types (ORA_ZCA_VIEW_SRT_REPORT_TYPES_DATA_PRIV)	View the express report type classifications for the reports you can view.	• Sales Administrator • Sales Manager • Sales Representative • Sales VP • Partner Administrator • Partner Sales Manager

Who Can See Which Report and Who Can Share Them

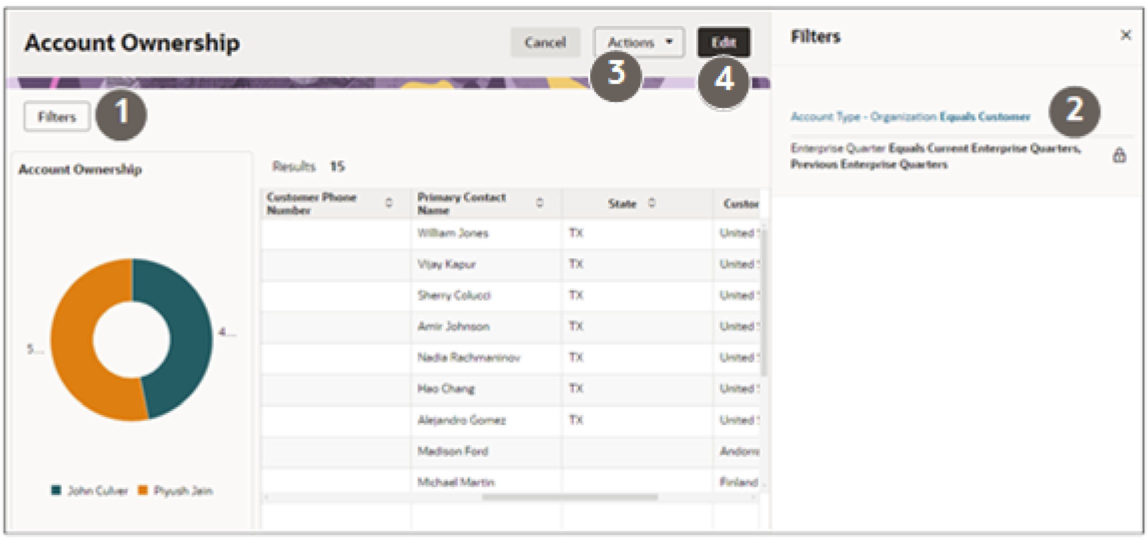
Express reports includes data security which controls if a report can be seen only by the owner or the sales organization as a whole. Who can see which report and who can share them with the organization is controlled by Sales and Service Access Management access groups.

By default, all users can view only the personal reports they create and those that administrators share with the organization. Sales administrators can view and edit all of the reports in the organization, including the personal ones, and share them with the organization as a whole. If a sales manager wants to share a report with the rest of the team, they can ask a sales administrator to share it.

Salespeople can't edit reports that are shared with them. However, the report creators can allow users to select different values for filters in the report by turning on the Prompted option. If a user wants to edit a report, they can always copy it on the list page and edit their own personal copy.

Here's a screenshot of a sample report highlighting the kinds of actions you can take while viewing an express report.

Callout	Description
1	When viewing a report, you can display the filters used in the report.
2	You can edit the filter values for filters that were set up with the **Prompted** option turned on. Prompted filters show up as links. Filters with this option turned off display a locked icon.
3	You can export the data in the report to Microsoft Excel or to a .CSV file.
4	The **Edit** button appears only on the express reports you own unless you're an administrator. Administrators can edit all reports and share them with the rest of the organization.



Who Can See What Data in the Reports Themselves

When you view a report, you see only the sales information that you've permission to view. If the report highlights opportunity revenue, for example, managers may see different data from their reports and their peers. Access to sales data is affected by many factors. These include your position in the sales resource hierarchy and your membership in a sales team or sales territory.

3 Provide Access to Express Reports

Provide Custom Job Roles with Access Levels for Express Reports

If you're using custom job roles, then you must provide these job roles with the appropriate level of access to create, update, and share Express Reports.

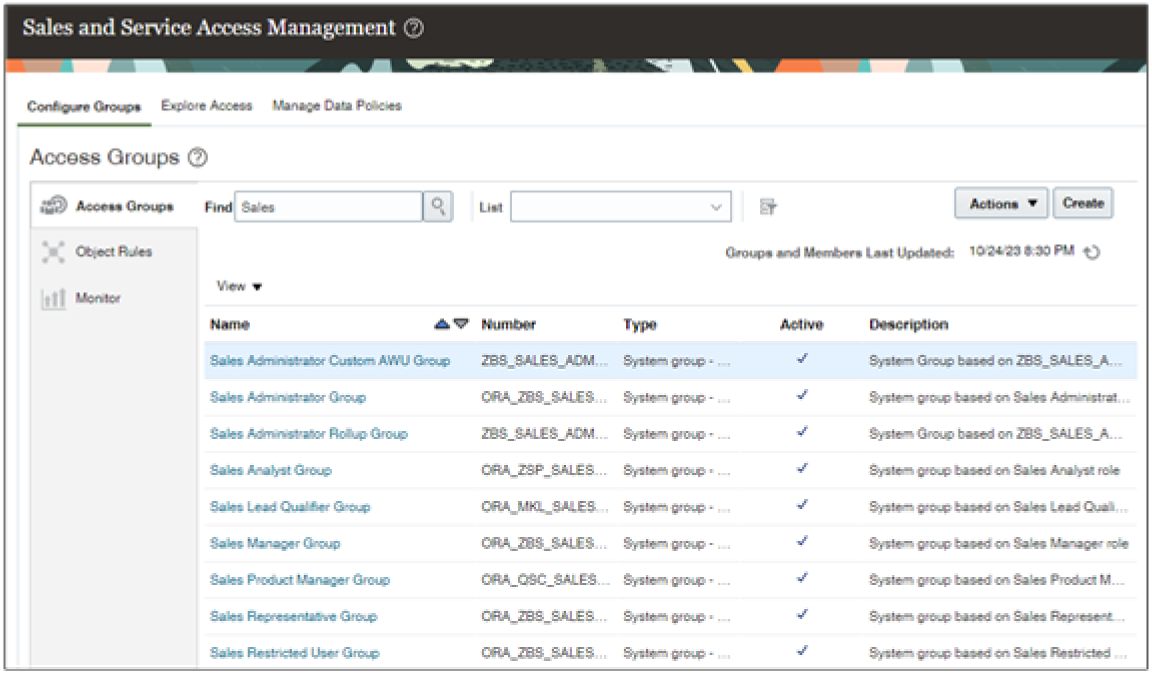
The access you provide applies only to the express reports themselves. What data users see in the reports depends on Sales data security, factors that include ownership, sales territories, and the resource hierarchy.

1. Identify all the custom job roles that require access to Express Reports.
2. From the Navigator, open **Sales and Service Access Management**.
3. On the Access Groups page, click the **Access Groups** tab in the left pane.

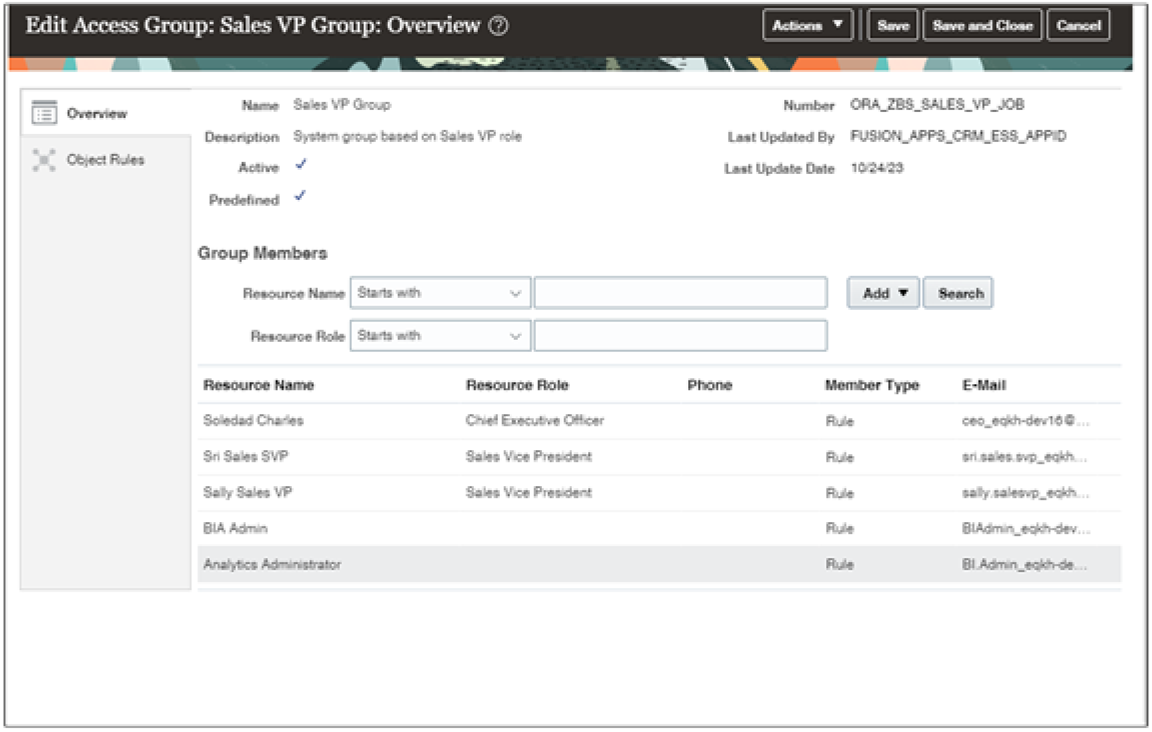
4. For each of the custom job roles, search for the corresponding access group and check that the access group lists the users that require access.

   Each time you create a custom job role, the application automatically creates an access group with the same name, appending the term Group. In this procedure, you're assigning these custom access groups (not the custom job roles themselves) to the data security rules.

   a. Using the **Find** field, search for an access group that corresponds to the custom job role.



   b. Drill down in to the access group to make sure the users that need access are members of the group.



c. If a user isn't listed, refresh the access control data by running the Refresh Access Control Data process from the Scheduled Processes work area.

> **Note:** You can't add users directly to an access group that's created from a job role. You must instead provision the job role to the users and run the Refresh Access Control Data process to copy them over to the access group. The process is automatically scheduled to run every hour and takes about two minutes to complete.

i. In the Navigator, click **Tools** > **Scheduled Processes**.
ii. Click **Schedule New Process**.
iii. In the Schedule New Process window, make sure the **Job** type option is selected.
iv. Click the arrow button to the right of the **Name** field and click the **Search** link at the end of the list.
v. Search for and select the **Refresh Access Control Data**.
vi. Click **OK** twice.
vii. In the Process Details window, for **Refresh Type**, select **Full Refresh** and click **Submit**.
viii. After the process completes, check again to see if the users are part of the access group.

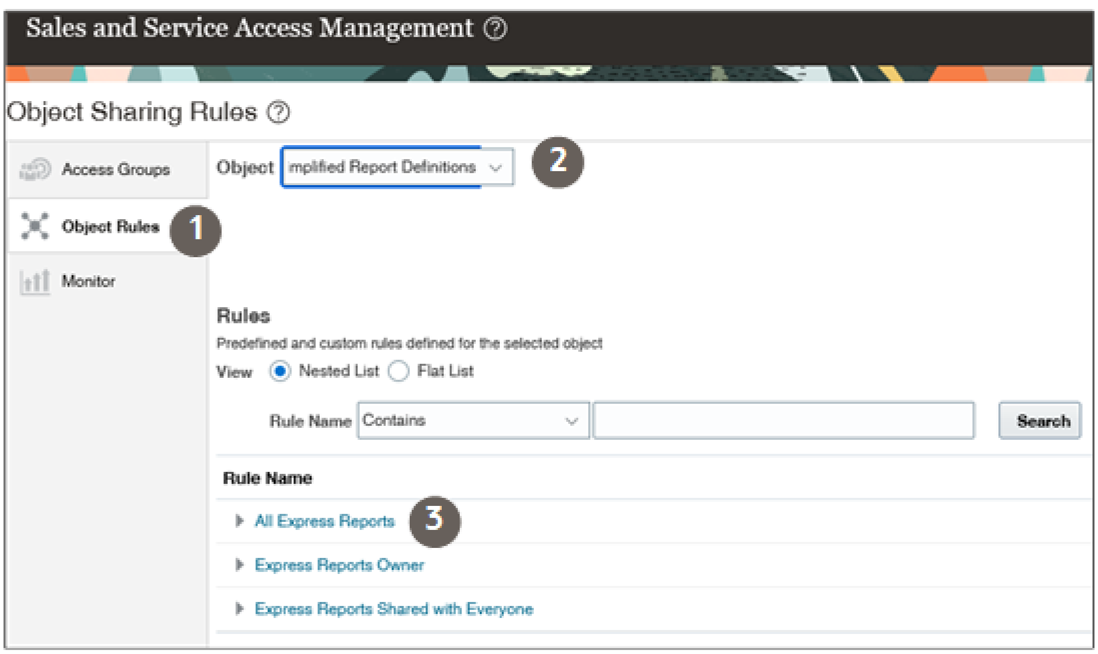
5. On the main Sales and Service Access Management page (**Navigator** > **Tools** > **Sales and Service Access Management**), assign the access groups corresponding to the custom job roles to the data security rules provided for Express Reports.

   These Express Report data security rules control access to the reports themselves, not to the data in the reports. You can set an access level for each job role in a rule, but many of the available settings make little sense. For example, you could grant only Read access level to sales administrators, but that would prevent them from creating or updating reports. The following table describes the three data security roles and the recommended access level settings.

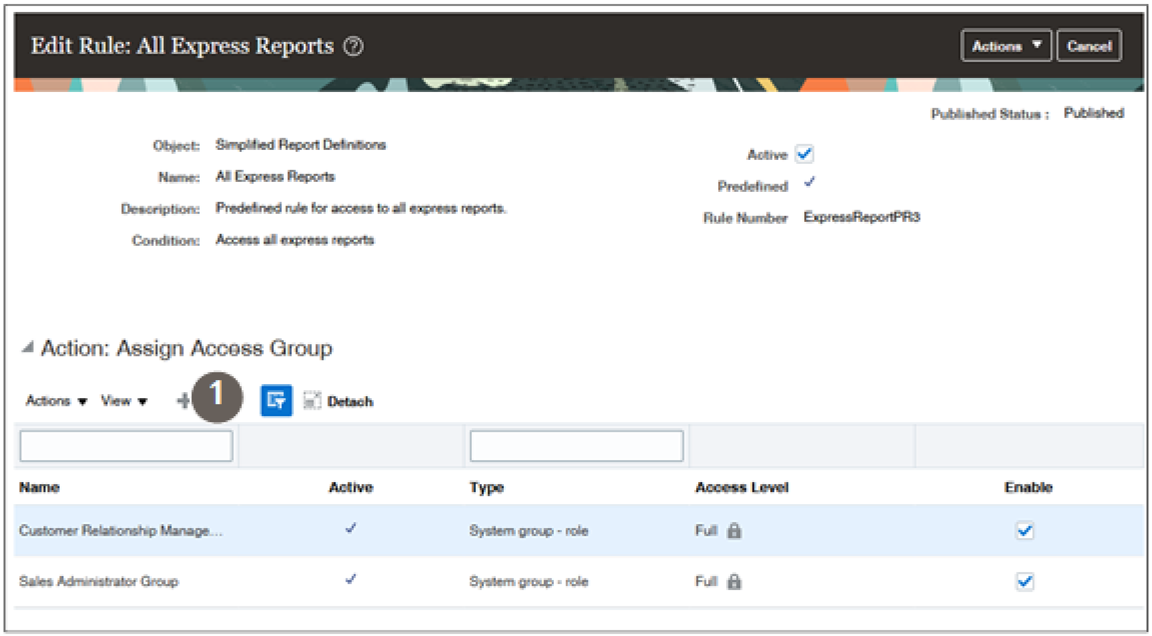
Express Reports Data Access Rules and Recommended Settings

Rule	Description	Recommendation
All Express Reports	Provides access to all express reports.	Add only administrator job roles to this rule. Oracle recommends you provide these roles with the **Full** access level. This level lets administrators create, update, delete, and share reports.
Express Reports Owner	Gives owners of a report access to the reports they own.	Add all job roles for users who create reports to this rule. Provide them with the **Full** access level.
Express Reports Shared with Everyone	Provides access to reports shared by administrators.	Add job roles you want to grant access to shared reports. Set the access level to **Read** as you don't want users deleting or editing reports shared by administrators.

a. On the Access Groups page, click the **Object Rules** tab in the left pane (callout 1 in the screenshot).
b. From the Object Sharing Rules page, **Object** field (callout 2), select **Simplified Report Definitions**.
c. Drill down on each rule (callout 3).



d. In the Edit Rule page, Action: Assign Access Group section, click **Select and Add** (the plus icon highlighted by callout 1 in the following screenshot.)



e. In the Select and Add: Access Group window, search for the access group corresponding to the custom job role and click **OK**.

f. Select an **Access Level**. The recommended settings are:
   - **Full** for the **All Express Reports** and **Express Reports Owner** rules.
   - **Read** for the **Express Reports Shared with Everyone** rule.

g. Make sure the **Enable** option is selected.

h. Save using the **Actions** button.

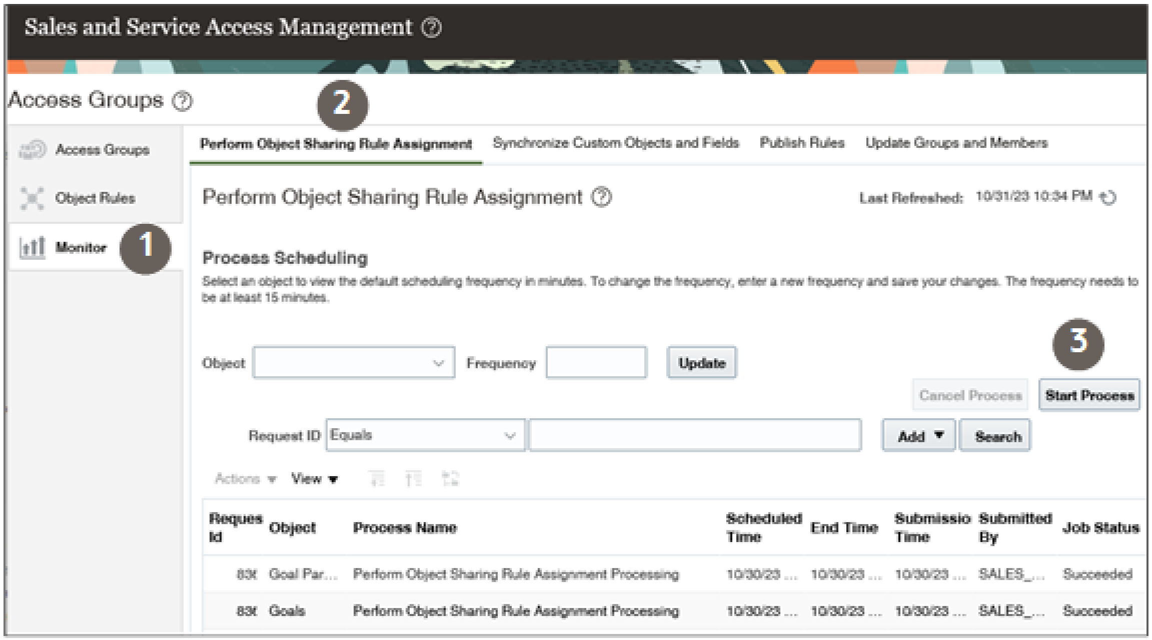
6. On the Object Sharing Rules page, click **Actions** > **Publish Rules**.

   Your action triggers the Perform Assignment Data Publish, Refresh, and Synchronization process.

7. Click the **Monitor** > **Publish Rules** tabs.

8. When the process completes, click the **Perform Object Sharing Rule Assignment** subtab (callout 2 on the following screenshot) on the **Monitor** tab (callout 1).

9. Click **Start Process** (callout 3).



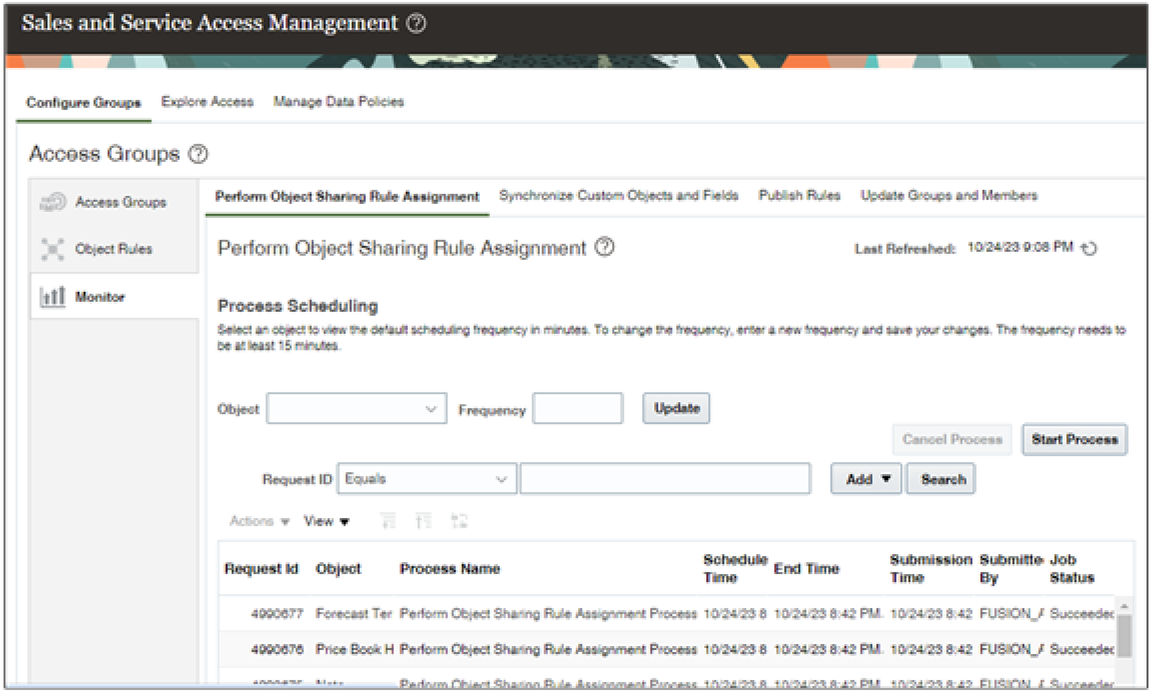
10. In the Schedule Process window, enter the following:
    - For **Object**, select **Simplified Report Definitions**.
    - For **Record Selection**, select **All records**.
11. Click **Submit**.
12. You can monitor the progress of the process. After the Perform Object Sharing Rule Assignment process completes, you can sign in with the different roles to test access to the reports.

Ensure User Access If You're an Existing Express Reports Customer

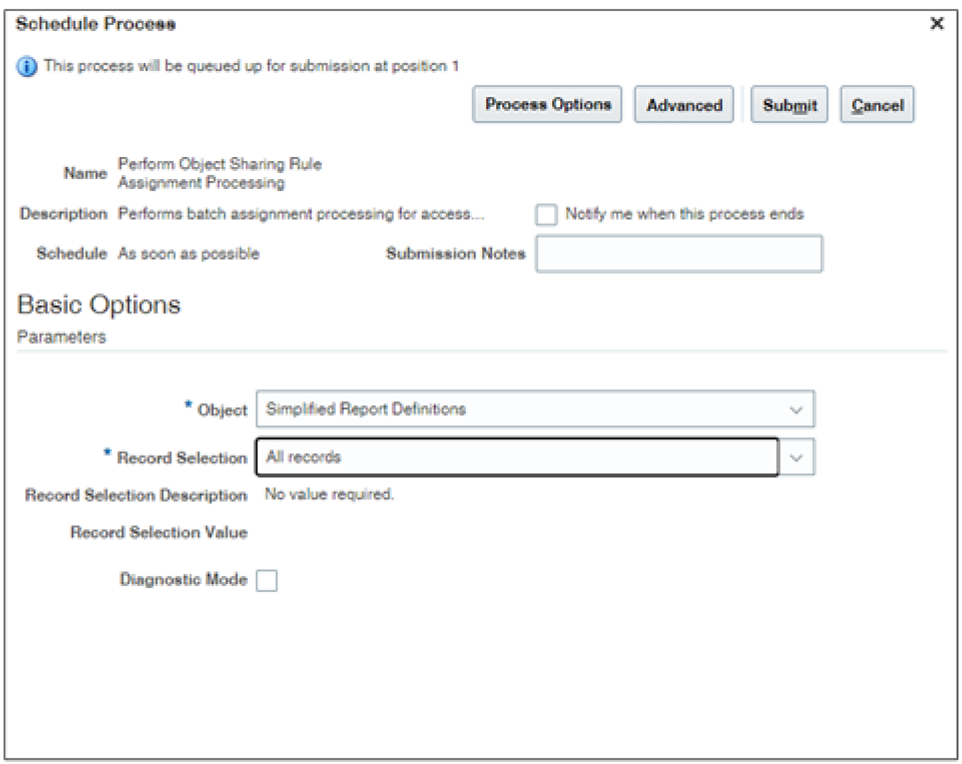
Prior to release 23D, express reports were available to all users with the appropriate functional privileges. Release 23D added report security. Express reports must now be shared by administrators before they can be accessed by others. The added data security means that users at upgrading customers may lose access to the reports they could view in the past. To ensure access, upgrading customers must enable access to the reports as described in this topic.

1. From the Navigator, open **Sales and Service Access Management**.
2. On the Access Groups page, click the **Monitor** tab in the left pane.

3. On the Perform Object Sharing Rule Assignment tab, click the **Start Process** button.



4. In the Schedule Process window, **Object** field, select **Simplified Report Definitions**.
5. In the **Record Selection** field, select **All records**.



6. Click **Submit**.

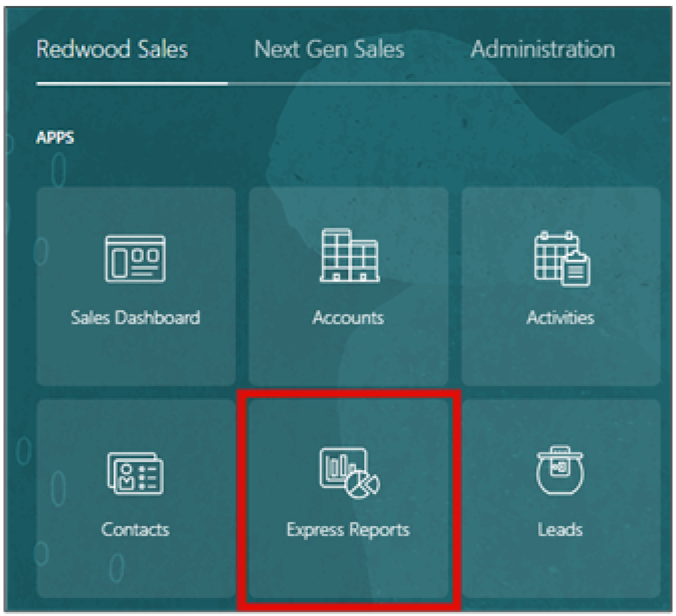
7. When the Perform Object Sharing Rule Assignment Processing process completes, sign in with the different roles to see if you can create, edit, and save reports.

4 Use Express Reports

View and Manage Express Reports

To view and manage express reports, click the **Express Reports** icon in the **Redwood Sales** tab on your Sales home page. You can also make a selection in the Navigator or use a bookmark in your browser.

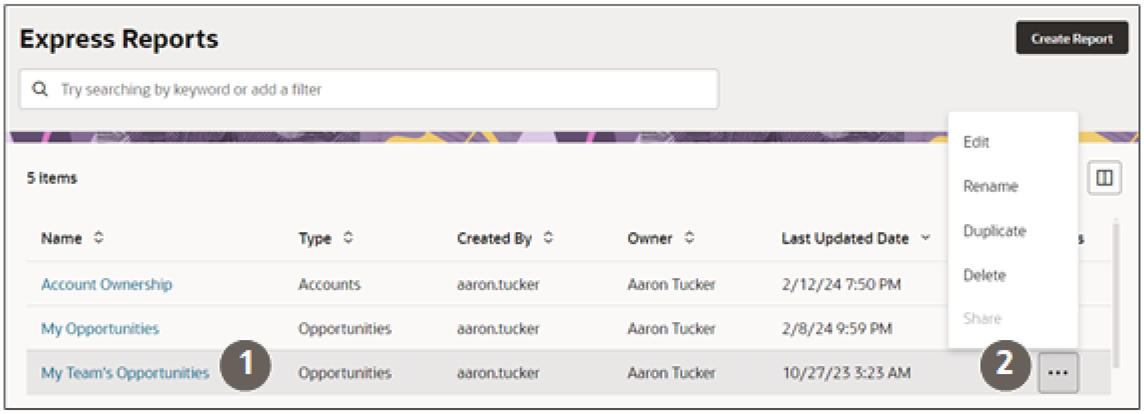
Here's a screenshot of the Redwood Sales tab on the home page highlighting the Express Reports icon.



On the Express Reports list page you can:

- View a report by clicking its name link (callout 1 in the following screenshot).
- Edit, rename, duplicate, delete, and share reports by clicking **Actions** (callout 2).

  Everyone can edit, delete, and rename the reports they own. And they can duplicate reports shared with them. But only administrators can edit any report and share that report with the sales organization as a whole.
- To create a report, you can either click **Create Report** or duplicate an existing report and edit it.



Create an Express Report

You can create an express report either from scratch or by copying an existing report and editing the copy. If you're an administrator, you can share the reports you create with your organization. If you share reports, each individual sees only the information on the data they can access.

Here's how to create a report from scratch:

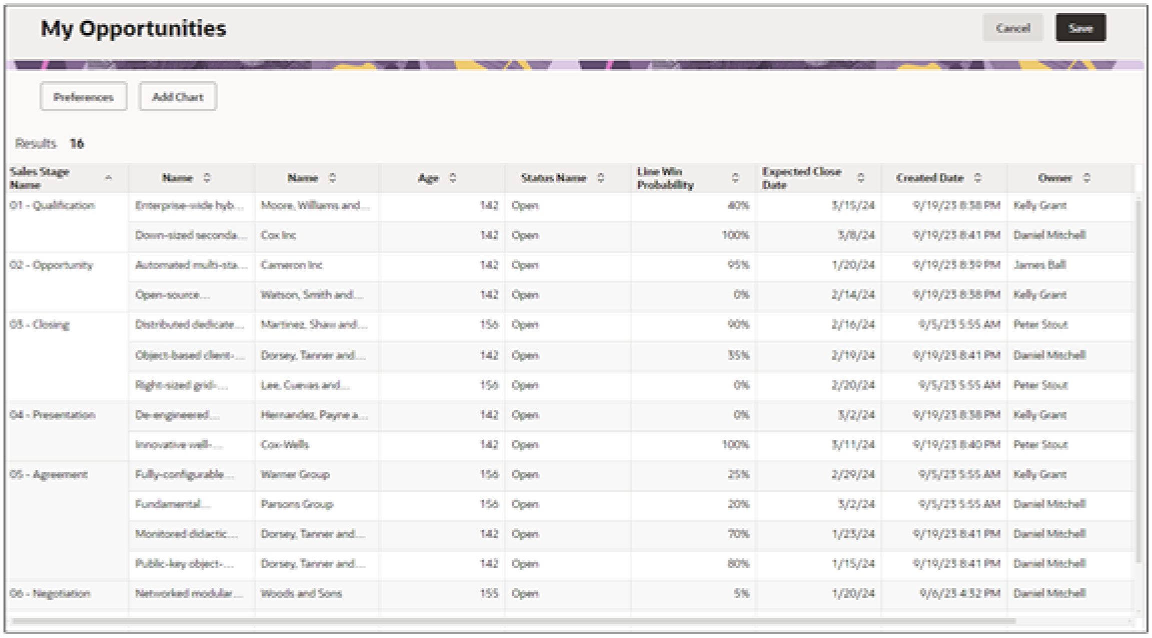
1. Open the Express Reports work area.

   You can do so using a bookmarked URL, by clicking on the icon on the home page, or by making a selection in the Navigator.
2. Click **Create Report**.
3. Enter a name and description.
4. Select the report type.

5. Click **Create**.

   The application displays an initial report that includes the columns and filters present in the report type you selected. You can edit the report to your specifications.

   Here's a screenshot of a sample report.



6. Click the **Preferences** button to specify the columns, filters, and groups for your report.

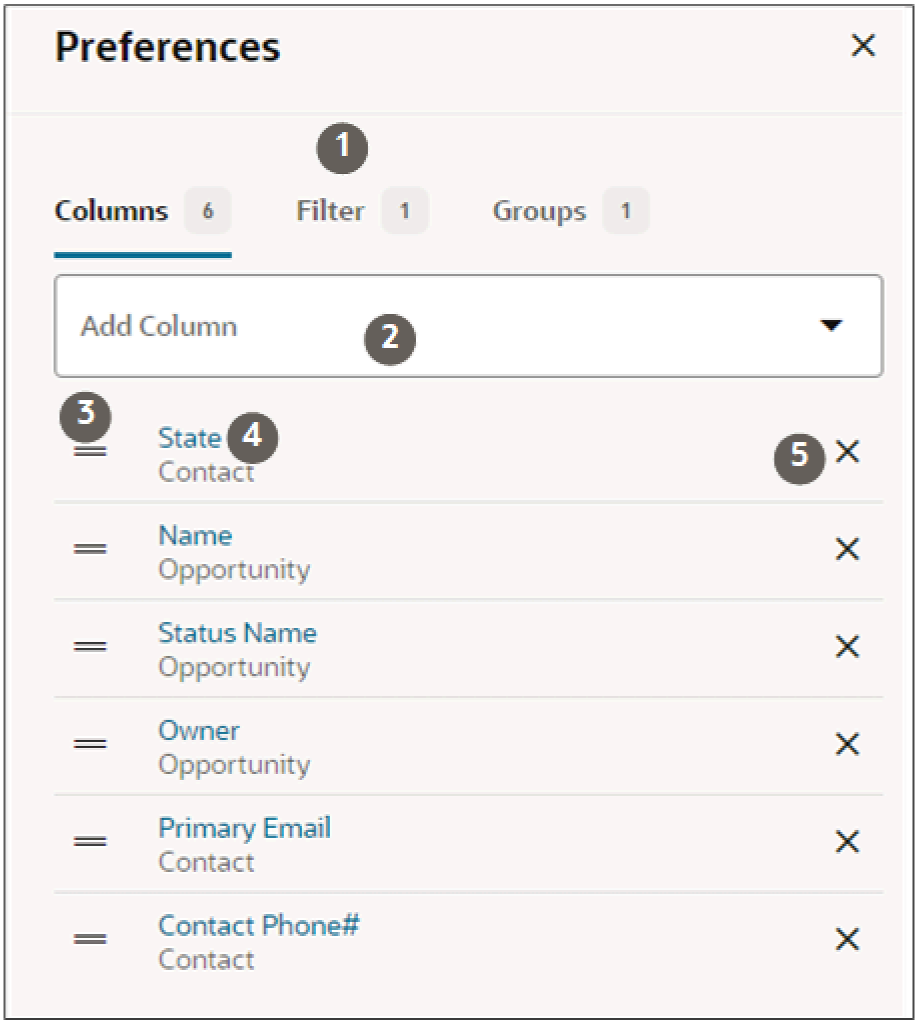
   For details, see the topics:

   - *Specify Which Columns Appear in Your Report*
   - *Add Filters to Your Report*
   - *Group Data in Your Report*
   - *Rearrange Column Order in the Report*

   Here's a screenshot of the Preferences section with the Columns tab selected. The usage tips in the table apply to the other tabs as well.

Callout Number	Description
1	Unlike Microsoft Excel where you edit in the columns themselves, in Express Reports you do all your work in the three tabs: Columns, Filters, and Groups.
2	Click **Add Column** (down arrow icon) to pick one of the most frequently used attributes or search for an attribute by keyword.
3	Drag by the lines icon to change order.
4	Drill down into an attribute to change its name.

Callout Number	Description
5	Delete the item from the list.



7. Click **Add Chart** to add a chart to the report. You must have at least one group added to your report to build the chart. For details, see the topic *Add a Chart to Your Report*.

Specify Which Columns Appear in Your Report

Use the Columns tab in Preferences to select columns, the data format, and column order. From the Columns tab, you can also rename the column headings in your report.

1. Display the report by clicking **Action** > **Edit**.
2. Click **Preferences**.
3. In the Preferences panel, click the **Columns** tab.
4. You can:
   - Add columns from the list of available columns.
   - Reorder columns by dragging them using the handle on the left side of the column list.
   - Remove columns from the report.

- Edit the column names by drilling down on a name and editing the text in the Column Name field.
- Specify the format and units for the column data.

5. Click **Save**.

Add Filters to Your Report

You can filter the data in your report using the Filter tab in Preferences. You can add multiple filters, including attributes that don't display as columns in your report. On many filters, you can make it possible for users of the report to choose different filter values, by selecting the Prompted option.

1. Display the report by clicking on its name link or by clicking **Action** > **Edit**.
2. Click **Preferences**.
3. In the Preferences panel, click the **Filter** tab.
4. In the **Add Filter** field, click the down arrow icon to view a list of filters. Or search for the attribute you want to add by keyword.
5. Enter the filter criteria. You can add multiple values.
6. To allow users to change filter values when viewing the report, turn on the **Prompted** option.
7. Click **Save**.

Group Data in Your Report

Group the data in your report by one or more attributes. For example, you can group opportunities by sales stage and by opportunity owner. You can use any of the groups you add to create a chart in your report.

Do the following to add groups

1. Display the report by clicking on its name link or by clicking **Action** > **Edit**.
2. Click **Preferences**.
3. In the Preferences panel, click the **Group** tab.
4. Add one or more attributes as a group. You can modify the order of the groups by dragging.
5. Click **Save**.

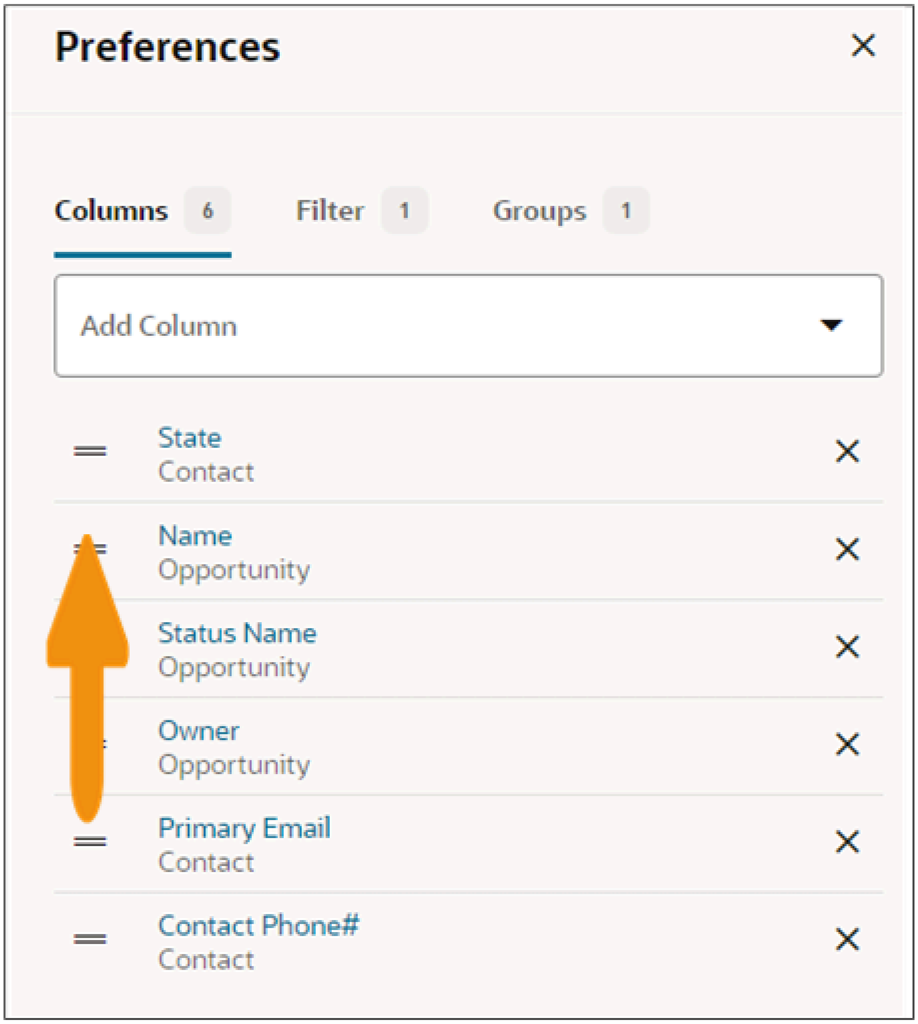
Rearrange Column Order in the Report

You can rearrange the order of columns in the report by dragging columns in the Preferences panel.

1. Open the Express Reports work area.

   You can do so using a bookmarked URL, by clicking on the icon on the home page, or by making a selection in the Navigator.
2. Display the report by clicking on its name link or by clicking **Action** > **Edit**.
3. Click **Preferences**.
4. In the Preferences panel, click the **Columns** tab.

5. Click the 2-dashes icon on the column you want to move and drag it to the desired position.



Rename Column Headings

You can rename the column headings in your report to make them more understandable. The attribute names provided by Oracle for different objects are often hard to distinguish. For example, opportunity name, product name, and account name all display as "Name" in the column heading.

Here's how to edit the names:

1. Edit or create the report.
2. Click **Preferences**.
3. Click **Columns** in the Preferences panel.
4. Click the column name link.
5. Edit the **Column Name** text.
6. Click **Back** and save.

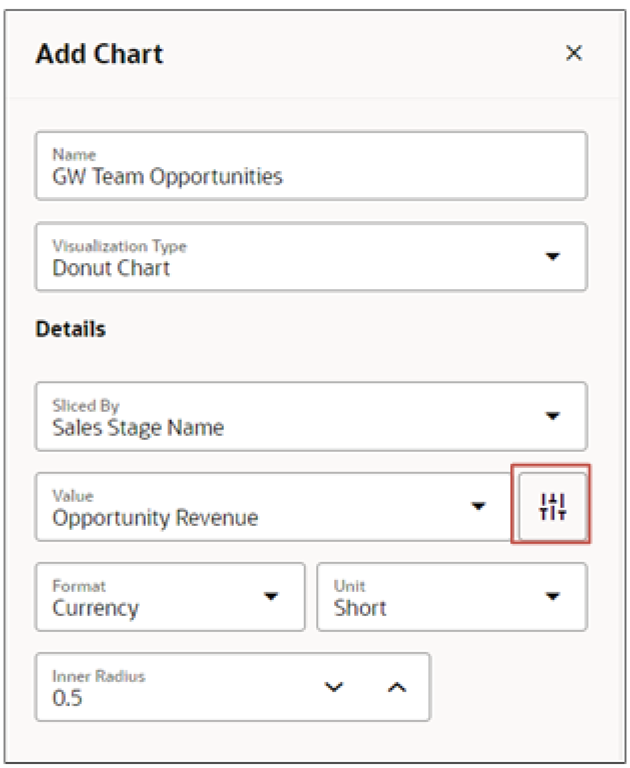
Add a Chart to Your Report

You can add a chart to your report. You must add at least one group to slice the data by before adding the chart.

1. Open the Express Reports work area.

   You can do so using a bookmarked URL, by clicking on the icon on the home page, or by making a selection in the Navigator.
2. On the Express Reports page, click **Action** > **Edit** for the report you want to edit.
3. Click **Add Chart**.
4. Make the following entries:

Field	Description
Name	Optionally, enter a name that's different from the report name.
Visualization Type	Select the type of chart.
Sliced By	Select one of the groups you added to the report.
Value	Select the column that you want to chart.
Preferences (arrows icon highlighted in the screenshot)	Lets you specify the format and unit for the column you selected as the Value.

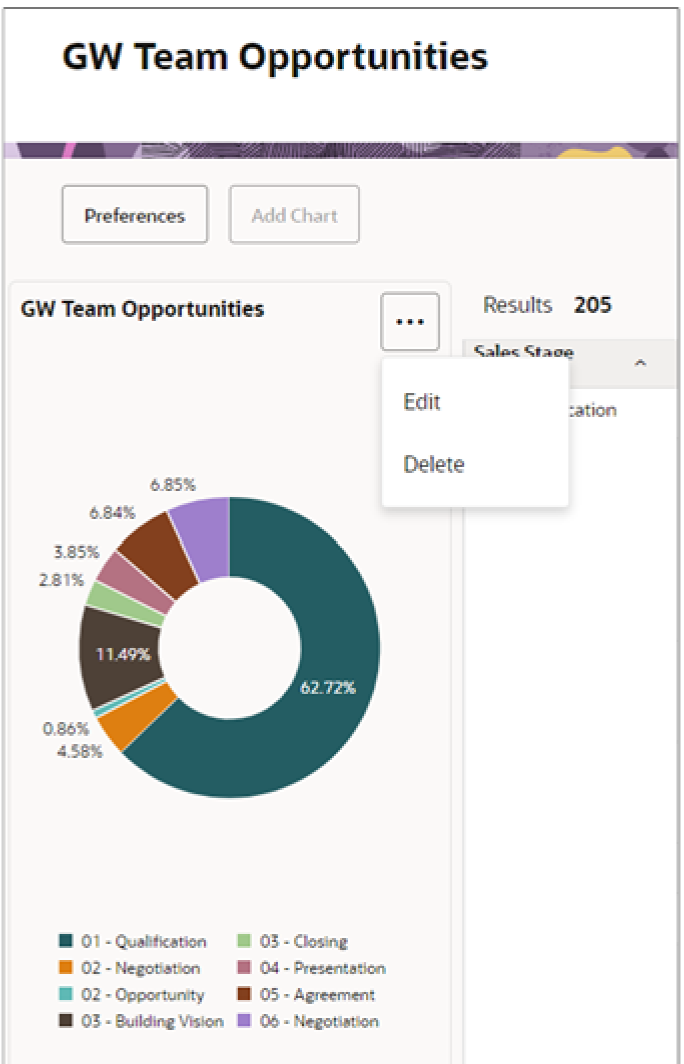


5. From the **Visualization Type** list, select the type of chart you want to display. Options include bar chart, doughnut chart, and funnel chart, and so on.
6. In the **Sliced By** field, select how you want the data to be categorized. How you can slice data depends on the groups you added to the report. For example, if you grouped your data by sales stage and opportunity owner, then you can select either of these for your chart.
7. Enter any other details required by the visualization you selected.
8. Click **Save**.

Edit an Existing Chart

Here's how to edit the format or data display of a chart you added to an express report.

1. Open the express report and click **Edit**.
2. Click **Actions** (the 3 dots) in the chart section and click **Edit**.



3. Make your edits in the Add Chart section.

See the topic *Add a Chart to Your Report* for details.

4. Click **Save**.

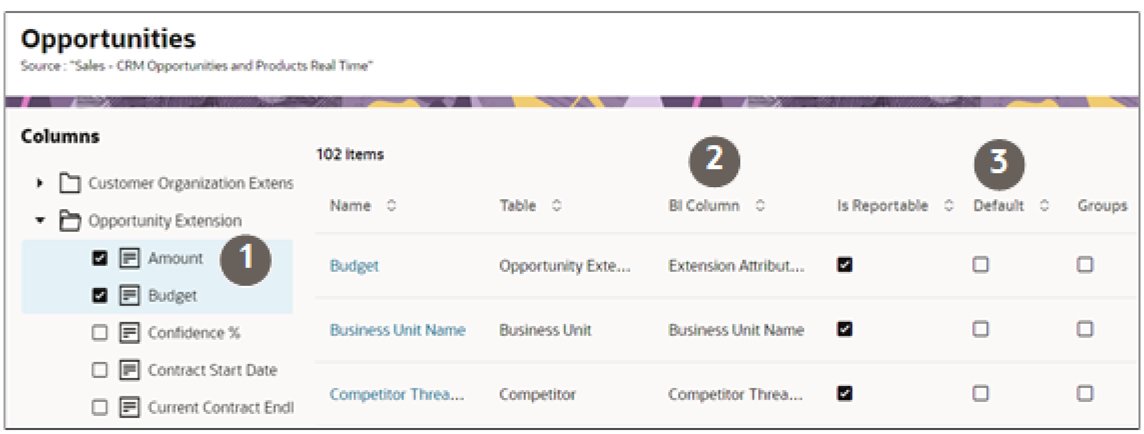
Add Custom Attributes to Express Report Types Predefined by Oracle

Sales administrators, and other users with the Manage Express Report Types privilege, can add custom attributes to the report types predefined by Oracle. Here's how.

You can add nonstandard (custom) fields you created and published in Application Composer to the report types provided by Oracle. The custom fields you can add can be text, numeric data, and fixed-choice fields.

Here's how to add the nonstandard fields:

1. Open the Express Reports list page. You can do so through a bookmarked URL, by clicking on an icon on the home page, or by making a selection in the Navigator.
2. Click **Manage Report Types**.
3. Click the report type name.
4. Open the Extension folder for the object in the **Columns** pane.
5. To add the field, select the check box (highlighted by callout 1 in the screenshot). The field appears in the right pane.
6. **Tip:** The **BI Column** identifies these types of fields as an Extension Attribute (callout 2). You can sort the BI Column to see all of the extension attributes all together for easier identification.
7. Select the options for the attribute (callout 3):
   - **Is Reportable**: Can be included in the report.
   - **Groups**: Can be used to group data in the report.

   Note: The **Default** option, which specifies the columns that appear in the report, is disabled for the Report Types provided by Oracle. Custom attributes can't be displayed as columns.
8. 

9. Drill down on the name of each custom attribute you added to specify the display preferences:
   - **Format**: the data display format, such as date, decimal, and currency.

- **Unit**: the display units. For example, you can specify a number to be displayed as is or rounded up or down.
- **Aggregation**: Specify how you want to calculate summary totals of the data in the report. For example, if you're creating a report on the number of opportunities for different team members, then select **Count Distinct** rather than **Count** for your totals. Multiple salespeople can be involved in an opportunity team, so you want to prevent double counting.

10. Save.

Create Report Types for Custom Subject Areas

Administrators can create report types for custom subject areas. A report type specifies which attributes are available for the report.

Before you create a report type, you must first create and publish a custom subject area in Application Composer. Because your data comes from Oracle Transactional Business Intelligence (OTBI), it's also helpful to understand how OTBI terminology translates into sales application terminology. For example, the Customer Organization Extension folder contains information on Accounts. Customers are accounts in the Sales application.

1. Open the Express Reports list page. You can do so through a bookmarked URL, by clicking on an icon on the home page, or by making a selection in the Navigator.
2. Click **Manage Report Types**.
3. Click **Create Report Type**.
4. In the **Custom Data Set** field, select the custom subject area that you created ahead of time in Application Composer.
5. Provide a name and optional description.
6. Click **Create**.
7. Use the same procedure to add the fields to the report as you do for the reports provided by Oracle.
    a. Open the folder for the object in the **Columns** pane.
    b. Select the check box to add the field.
    c. Select the options for the attribute in the right pane:
        - **Is Reportable**: Can be included in the report.
        - **Groups**: Can be used to group data in the report.
        - **Default**: makes the attribute appear as a column in the report by default. You must specify at least 1 default column and as many as 10 columns in a report type. Users can change the columns in the report, by removing the default columns and adding attributes you specified as **Is Reportable**.
    d. Drill down on the name of each custom attribute you added to specify the display preferences:
        - **Format**: the data display format, such as date, decimal, and currency.
        - **Unit**: the display units. For example, you can specify a number to be displayed as is or rounded up or down.
        - **Aggregation**: Specify how you want to calculate summary totals of the data in the report. For example, if you're creating a report on the number of opportunities for different team members, then select **Count Distinct** rather than **Count** for your totals. Multiple salespeople can be involved in an opportunity team, so you want to prevent double counting.
8. Save.

Share Express Reports with the Sales Organization

Express reports are visible only to their owners. But sales administrators can edit and share any of the express reports created by users with the whole sales organization. If a sales manager wants to share a report they created, they can do so by asking a sales administrator to share it for them.

Sales administrators share a report from the Express Reports list page, by clicking **Actions** (3 dots icon) and selecting **Share**.