

Oracle MICROS

Reporting and Analytics User Guide



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Preface

Oracle MICROS Reporting and Analytics is a web-based application that centralizes point-of-sale (POS) data to provide operational and analytical insights into business operations, and to improve efficiency by delivering information to all roles within an organization.

Purpose

This document is intended for customers subscribed to Oracle MICROS Reporting and Analytics Advanced Cloud Services. Customers using Standard Cloud Services and On-Premise deployments may not have access to all features described in the documentation. Your organization type can affect visibility and access to features within Reporting and Analytics.

The navigation instructions throughout the documentation may not accurately depict the menu layout for your Oracle MICROS Enterprise Back Office deployment because administrators can customize the name and organization of the groups and links in the sidebar menu. Use the navigation instructions provided as a guideline for locating the links in your deployment, or contact an administrator for assistance.

Audience

Oracle MICROS Enterprise Back Office documentation applies to the following users:

- Users who perform day-to-day operations with Enterprise Back Office and who typically do not have permissions to configure applications.
- Administrators who configure and maintain Enterprise Back Office. Administrators can also have permissions to configure applications.
- System Administrators or Super Administrators who maintain Enterprise Back Office servers and configuration files, implement initial application settings and configurations, and maintain back-end processes such as automated jobs and data interfaces with third-party applications.

Customer Support

To contact Oracle Customer Support, access the Support Portal at the following URL:

<https://iccp.custhelp.com/>

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle MICROS product documentation is available on the Oracle Help Center at <http://docs.oracle.com/en/industries/food-beverage/>.

Revision History

Table 1 Revision History

Date	Description of Change
October 2020	Initial publication.
January 2021	<ul style="list-style-type: none"> • Added information on API accounts and Business Intelligence API. • Updated Organizational Hierarchies. • Added Guest Checks.
February 2021	Added Password Requirements section.
March 2021	Added Scheduled Reports section.
April 2021	Added sections on the hierarchy administrator and functional administrator.
June 2021	<ul style="list-style-type: none"> • Added Configure Tender Media Master Items for Daily Operations Report section. • Added Screen Resolution section.
August 2021	<ul style="list-style-type: none"> • Updated Dashboards section with definition of current hour. • Added Accessing Reporting and Analytics section.
September 2021	<ul style="list-style-type: none"> • Updated Adding a Location Group section. • Updated Adding Locations section with phone details.
November 2021	<ul style="list-style-type: none"> • Updated Adding an Export Configuration. • Moved Payment role information to <i>Oracle MICROS Payment Cloud Service</i> documentation.
December 2021	Updated Creating Day Parts.
January 2022	Updated business date range in Searching for Guest Checks.
March 2022	<ul style="list-style-type: none"> • Added Edit Sales and Tax Labels. • Added VAT and GST Tax Labels. • Updated Currency and Exchange Rate. • Updated Enabling Currency Configuration. • Updated Adding a Currency Type. • Added Setting a Location's Currency.
May 2022	Updated Supported Languages with user interface language options.

Table 1 (Cont.) Revision History

Date	Description of Change
September 2022	<ul style="list-style-type: none"> • Updated Adding an Export Schedule with PGP encryption details. • Updated Adding Locations with details about using Symphony to add locations. • Updated Building a Custom Report in Microsoft Excel. • Updated Searching for Guest Checks with wildcard search details. • Updated Adding a Delivery Profile. • Added Retrieving Transaction Information with Audit & Analysis.
October 2022	<ul style="list-style-type: none"> • Added Exporting Audit & Analysis Queries.
January 2023	<ul style="list-style-type: none"> • Added Integrations chapter. • Added Configure Export Status Notifications. • Added Export Status Notifications. • Updated Searching for Guest Checks. • Updated Data Permissions. • Updated Adding an Export Schedule. • Updated Searching for Guest Checks. • Updated Data Permissions. • Updated Adding a Delivery Profile. • Updated Adding an Export Schedule.
April 2023	<ul style="list-style-type: none"> • Added Visibility of Gross Sales and Tips. • Updated Adding an Export Schedule. • Updated Exporting Reports. • Updated Searching for Guest Checks. • Updated Navigating Reporting and Analytics. • Updated Adding a Delivery Profile.
June 2023	<ul style="list-style-type: none"> • Added Symphony Inventory. • Updated Add Users. • Updated Item Alignment.
July 2023	<ul style="list-style-type: none"> • Updated Adding Locations.
October 2023	<ul style="list-style-type: none"> • Updated Building a Report with the Basic Editor. • Updated Building a Report with the Advanced Editor. • Updated Adding API Accounts.
November 2023	<ul style="list-style-type: none"> • Updated Adding a Delivery Profile.

1

Getting Started

Oracle MICROS Reporting and Analytics is a web-based reporting solution that helps you understand and act on data for your enterprise's food and beverage operations. Reporting and Analytics receives data from point-of-sale (POS) workstations and makes that data available through reports and dashboard tiles.

The following table lists examples of how enterprise users interpret and take action on data:

User	Example
Chief Operating Officer	The Chief Operating Officer wants to view a comparison of sales for three signature hamburgers in different regions and wants to view a comparison of district and location sales.
Store Manager	The Store Manager wants to identify the most and least profitable menu items, and to identify positive and negative sales and cost outliers.
Loss Prevention Manager	The Loss Prevention Manager wants to identify employees with increasing error correction totals due to it being a potential sign of fraud.
Business Analyst	The Business Analyst wants to determine which locations are most profitable with the guests they attract, which locations are upselling, which locations could profit by upselling more items, and which locations have trouble attracting customers.

Supported Browsers and Cookie Usage

The following table lists browser and platform support details for Reporting and Analytics 20.1 and other Enterprise Back Office 9.1 products:

Browser	Reporting and Analytics 20.1	Inventory Management 9.1, Labor Management 9.1, Gift and Loyalty 9.1
Microsoft Edge	Supported	Supported 1
Microsoft Internet Explorer (versions 11 and 10) ²	Not supported	Supported
Mozilla Firefox	Supported 3	Supported 4

Browser	Reporting and Analytics 20.1	Inventory Management 9.1, Labor Management 9.1, Gift and Loyalty 9.1
Google Chrome	Supported ⁵	Not supported
Apple Safari	Supported	Not supported

- 1 Not supported with Inventory Management
- 2 Support for Microsoft browsers will follow the same N-1 support policy that iOS provides. The most recent version plus one previous release. As of January 12, 2016, this means the most recent version of Microsoft Edge only.
- 3 Not supported on Android and Apple iOS.
- 4 Not supported with Enterprise Maintenance Services and Labor Management Advanced Scheduler.
- 5 Not supported on Apple iOS.

Reporting and Analytics uses cookies to improve your app experience by remembering your visits.

Accessing Reporting and Analytics

To access Reporting and Analytics from a tablet or desktop computer, use the URL that was provided by Oracle.

To access Employee Self Service from a mobile device or tablet, add `/mobile` to the end of the original URL. For example: `https://<your Reporting and Analytics URL>/mobile`. See the “Employee Self Service” section of the *Oracle MICROS Labor Management User Guide* for more information.

To switch to the tablet and desktop-optimized page, click **Go To Desktop Site** at the bottom of the page.

Screen Resolution

The Reporting and Analytics user interface is optimized for screen resolutions between 768 x 480 for tablet landscape or portrait mode and 1920 x 1080 for 1080p high-definition display units.

Navigating Reporting and Analytics

Explore the dashboard layout and report features.

Home Page

My Reports is your home page in Reporting and Analytics.

Dashboard

Elements on the dashboard are called out by number in the table and correspond to the image. These elements are anchored and appear on every page within Reporting and Analytics.

Callout Number	Element	What It's Used For
1	Side navigation menu	Navigate between reports, administration features, and portlets.
2	Help	Hover over or click the icon wherever it appears to find out more information.
3	User menu	View profile or sign out.
4	Reports navigation	Access report features.

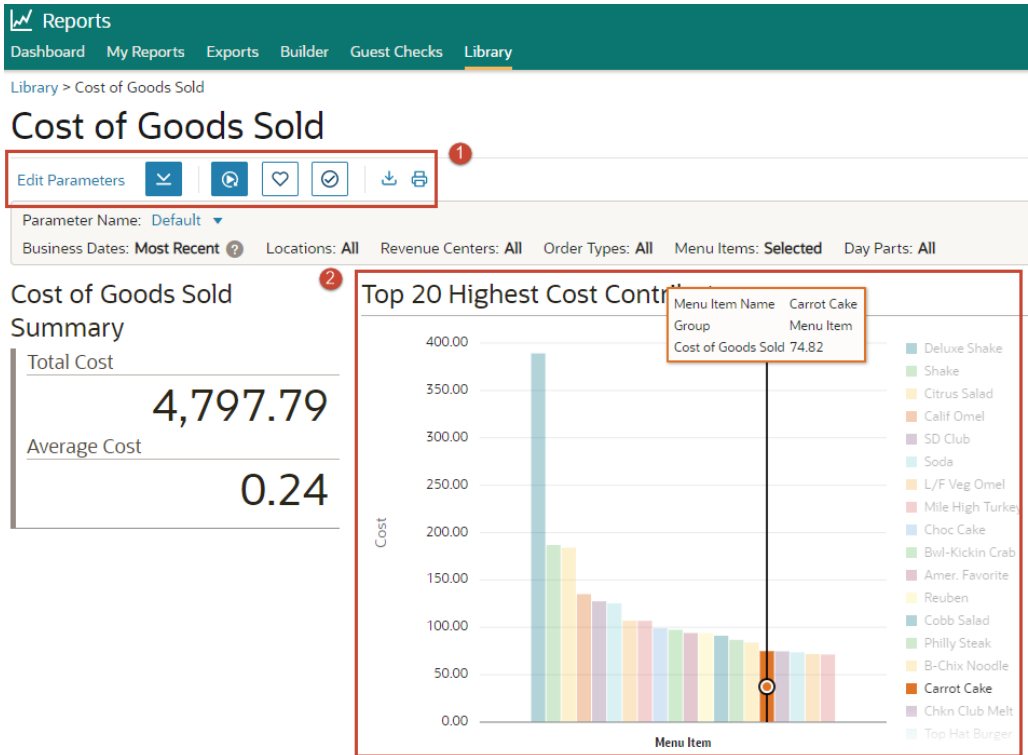
The screenshot shows the Oracle Food and Beverage reporting interface. At the top, there is a header with the Oracle logo and 'Oracle Food and Beverage'. Below this is a navigation bar with 'Reports' highlighted. A secondary navigation bar contains 'Dashboard', 'My Reports', 'Exports', 'Builder', 'Guest Checks', and 'Library'. The main content area displays a 'Dashboard' for 'Gross Sales' with a bar chart and a summary table for 'Gross Sales After Discounts'.

Reports

All available reports are housed in the Reporting and Analytics Library tab and you can create new reports in the Builder tab. You can easily access the reports that are most useful to you in the My Reports tab.

Features in reports are called out by number in the table and correspond to the images.

Callout Number	Element	What It's Used For
1	Toolbar	Edit parameters, show or hide report parameters, auto run reports, favorite reports, add reports to My Reports, download reports, and print reports. The toolbar appears on all reports.
2	Report component	View and interact with report components which include tables and charts. Hover over charts and more details will appear. Your permissions determine which report components are visible.
3	Smart cell selection	Select column headers for certain reports with smart cell options.
4	Drill-downs	Hyperlinked entries drill down to more detailed reports.



Library > Employee Productivity

Employee Productivity

Edit Parameters [Icons]

Parameter Name: Default
 Business Dates: Most Recent Locations: All Revenue Centers: All

Key Performance Indicators by Employee

Manage Columns

Employee Name	Location	Net Sales*	Check Count*	Guest Count*	Average Spend per Guest*	Table Turns*	Average Check*
Total		38,942.72	1,989	3,441	11.32	1,400	19.58
[Employee Name]	Miami	1,589.55	67	0	0.00	0	23.72
[Employee Name]	Miami	1,185.55	60	100	11.86	59	19.76
[Employee Name]	Miami	1,083.16	40	92	11.77	39	27.08
[Employee Name]	Columbia	1,020.98	49	89	11.47	26	20.84
[Employee Name]	Miami	1,011.37	28	86	11.76	28	36.12
[Employee Name]	San Francisco	945.13	32	82	11.53	28	29.54
[Employee Name]	Miami	888.36	32	78	11.39	31	27.76
[Employee Name]	Miami	876.17	42	75	11.68	36	20.86
[Employee Name]	Miami	809.18	26	87	9.30	26	31.12
[Employee Name]	San Francisco	804.92	31	74	10.88	31	25.97

2

Accessibility

Keyboard options to make selections and navigate between different screens.

Using the Tab Key

Use the Tab key to navigate through Reporting and Analytics screens. The default tab order flows from left to right and top to bottom.

Switching Between Tabs in the User Interface

Use the arrow keys to switch from one tab to another tab.

Making Multiple Selections

You can use the CTRL key and arrow keys to make multiple selections of items that are not adjacent to each other.

To select multiple items:

1. Press the CTRL key and hold it down until all selections have been made.
2. Use the up and down arrow keys to navigate to the item and then press the space bar to select or deselect the item.
3. Repeat these steps for each item to be selected or deselected.
4. Release the CTRL key to finalize the selections.

Navigating a List

- Use the F2 key to navigate into a list.
- Use the tab key to navigate within the list.
- Use the Esc key to navigate out of the list.

Selecting a Check Box

Use the space bar to select a check box.

3

Control Who Sees What

Define the privileges and access users have within each role.

Reporting and Analytics provides a flexible data access control model that lets you create a streamlined experience for users so they see only the data that is important to them. Roles support business functions within your enterprise. Every user must be assigned a role. Data access is controlled within each role of the enterprise.



Note:

The administrator can grant data access not only to view certain screens, but can also grant further access to edit the screen.

The following table describes the data access controls:

Control	Description
Reports and Data	Use this control to: <ul style="list-style-type: none">• Specify the information within reports that a role can view.• Specify the reports that appear when members of the role go to their My Reports page.• Hide reports from members of a role by defining a blocked reports list.
Privileges	Defines the actions within Reporting and Analytics members of a role can run.
Portlets	Controls access to features from earlier versions of Reporting and Analytics.
Reports Dashboard	Specifies the report dashboard tiles that appear when members of the role go to their Dashboard page. A tile contains snippets of data from a report.

Add Reports Roles

Create a role to define user privilege

Required system privilege: **View/Add/Edit/Delete Roles**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, click **Roles**, and then click **Add Role**.
2. Enter the name of the role and click **Add**.
3. Click the **Role Administration** field and select roles that the current role can administer or configure.

4. Information will automatically populate in the other fields including:
 - **Status:** the default setting is **Active**.
 - **Record Return Maximum:** the default setting is **Standard**. This option refers to the maximum number of records that can be retrieved on reports.
 - **Labor Management:** this view appears for Labor Management users and is deselected by default.
 - **InMotion Mobile:** determines whether users can log into and view data in the app
5. Click **Save and Close** or **Save**.

Define System-Level Privileges

Define and place limits on what each role can do within Reporting and Analytics.

1. In Reporting and Analytics, click the side navigation menu, click **Administration** and then click **Roles**.
2. Click the role you want to update.
3. Click **Privileges** and select system privilege options.
4. Click **Save and Close** or **Save**.

Define Access to Reports and Data

Define the type of information a role can see within reports and block specific reports from view.

You must first grant the role system privileges to reports before assigning data permissions. See the “Define System-Level Privileges” section for more details.

1. In Reporting and Analytics, click the side navigation menu, click **Administration** and then click **Roles**.
2. Click the role you want to view.
3. Click **Reports and Data**, click **Manage Data Permissions**, select the data permissions this role should have access to, and then click **Save**.


Data permissions determine the information within a report that a role can view.

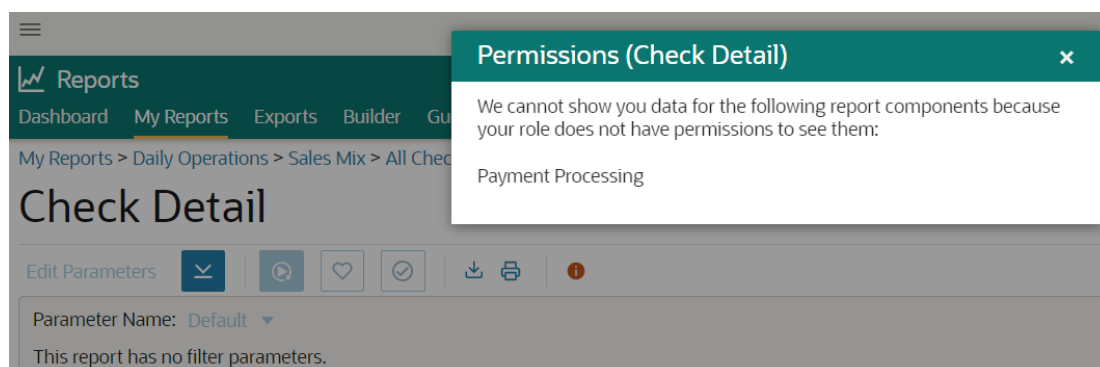
4. Click **Manage My Reports** to select reports for the My Reports tab in the reports navigation area.
5. Click **Manage Blocked Reports** and select any reports you want to block from view.

Blocked reports will not be visible to this role, even when searching for reports in the library.

Data Permissions

You can limit the type of information each role can view within reports. Each report component, like a table or pie chart, is associated with one or more data permissions. A role must have the permissions to view that report component. For example, a Store Manager should have access to operations performance information while other employees may not have the permission to view this information.

If a role does not have access to all the permissions listed on a report, you still have partial access to the report. Click the information icon  at the top of the report to understand which report components are not visible due to missing data permissions. The following image shows this message in the Check Detail report.



Refer to the *Oracle MICROS Reporting and Analytics Reports Guide* for the data permissions required to view each report component.

Additional access from data permissions includes:

- Access to the Dashboard, My Reports, and Library tabs if at least one data permission is selected.
- Access to the Guest Checks tab if the Sales and Operations data permission is selected.

Simphony Inventory

A separate role determines access to Simphony Inventory and the actions you can take. This role is not activated or available until the enterprise is provisioned for Simphony Inventory.

Define Access to Portlets

A portlet contains content and functionality for earlier versions of Reporting and Analytics. For example, if you have Inventory Management, a portlet directs you to this feature. Portlets appear on the side navigation menu after they are assigned.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Roles**.
2. Click the role you want to assign a portlet to, click **Portlets**, and then click **Assign Portlet**.
3. Select a portlet from the drop-down list.

4. Click **Assign Portlet**.

Assign Users to a Reports Role

Required system privilege: **View/Add/Edit/Delete Roles**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Roles**.
2. Click the role you want to view.
3. Click **Users** and then click **Assign User**.
4. Select the user from the drop-down list, or enter the name to see more results.
5. Click **Assign**.

 **Note:**

You can create a new user from this page by clicking **Add User**.

Administrator Roles

There are two types of administrator roles, the Hierarchy Administrator and the Functional Administrator. They grant access to areas of Reporting and Analytics to roles and they also manage users. See the two administrator role definitions below for more details.

 **Note:**

When upgrading from release 9.1 to release 20.1, the role with the **Sys Admin** option selected becomes the Hierarchy Administrator. Any roles in release 9.1 with access to the Portal portlet or the Administer Roles Admin portlet, become Functional Administrators in release 20.1.

Hierarchy Administrator

The Hierarchy Administrator is assigned to one role that has full access to all roles, users, enterprise levels, and locations. They are limited to granting access only to portlets, privileges, and data permissions that they themselves have access to. The Hierarchy Administrator:

- Is only assigned to one role.
- Can access the **Roles** and the **Users** module.
- Can access all users and roles in the enterprise.
- Can assign only portlets, privileges, and data permissions that they have access to.

- Can assign any level and location.

Functional Administrator

The Functional Administrator can be assigned to roles that manage access for other roles and users. They can grant access to any portlets, privileges, and data permissions. The Functional Administrator:

- Can be assigned to multiple roles and there must be at least one.
- Can also be the Hierarchy Administrator.
- Can access the **Roles** module.
- Can grant themselves access to the **Users** module.
- Can assign any portlets, privileges, and data permissions to themselves or any other role, even the Hierarchy Administrator.
- Can assign only the levels and locations they have access to.
- Can assign other Functional Administrators.

Set the Hierarchy Administrator

Must be the current Hierarchy Administrator to reassign.

Required system privilege: **View/Add/Edit/Delete Roles**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, click **Roles**, and then click **Assign the Hierarchy Administrator**.
2. Select the role you want to assign as the Hierarchy Administrator and then click **Save and Close**.

Set the Functional Administrator

Required system privilege: **View/Add/Edit/Delete Roles**.

Can only be assigned by a current Functional Administrator.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Roles**.
2. Click the role you want to set as a Functional Administrator.
3. Select **Functional administrator** and then click **Save and Close** or **Save**.

Compare Roles

Required system privilege: **View/Add/Edit/Delete Roles**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Roles**.

2. Click **Compare Roles**.
3. Select a role from the **Role 1** and **Role 2** drop-down options.
4. Click **Compare**.

Edit Roles

Required system privilege: **View/Add/Edit/Delete Roles**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Roles**.
2. Click the role you want to update, make your edits, and click **Save and Close** or **Save**.

Delete Roles

Required system privileges: **View/Add/Edit/Delete Roles**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Roles**.
2. Select the role you want to delete.
3. Confirm that there are no users assigned to the role.
4. Click **Delete** and then click **Delete**.

4

User Management

Add users, assign users to a role, edit and manage users.

In Reporting and Analytics, each user is uniquely identified with a user name and password. The user name and password, combined with a role, determine what tasks the user can perform and what data the user can see.

As a Reporting and Analytics administrator, you can manage users in your enterprise and do the following:

Add Users

Required system privilege: **View/Add/Edit Users**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Users**.
 - If you enabled Inventory Management after the 20.1 release of Reporting and Analytics, you must sync users. Click **Sync Inventory Users** and then click **Sync**. You can then follow the steps below to add new users to Reporting and Analytics.
2. Click **Add User**.
3. Enter the user's name, a unique user name, and email.
4. Select language, country, and time zone options from the drop-down lists.
5. Select a **Role** for the user and their **Enterprise Level or Location**.

Note:

- The enterprise must be provisioned for Symphony Inventory to add that role to the user.
 - If you unassign the Symphony Inventory role from a user, this user must be made inactive in Symphony Inventory.
 - If you deactivate a user with a Symphony Inventory role, the user must be made inactive in Symphony Inventory.
6. To select a revenue center option, click **All** to give a user access to all revenue centers or click **Selected** to chose revenue centers.
 7. Either click **Add and Add Another** or click **Add and Close**. Reporting and Analytics sends a welcome email to the user with a link to create a password. This link is valid for 60 minutes.

8. If you are prompted with the error message **Inventory sync of user has failed. Contact your system administrator for further information**, then you can manually sync users from Inventory Management. Click **Sync Inventory Users** and then click **Sync**.

View Users

Required system privilege: **View/Add/Edit Users**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Users**.
2. Type or select search criteria and then click **Search** to filter the search results.

For example, to view inactive users for an enterprise role named Enterprise Manager, select `Enterprise Manager` in the **Role** field and then select **Inactive**.

To search for a specific user, enter their name or system user name and then click **Search**.

Edit Users

Required system privilege: **View/Add/Edit Users**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Users**.
2. Search for the user and select the user.
3. Edit the user information and click **Save and Close** or **Save**.

Deactivate or Activate a User

The status of a user is active or inactive. For example, a seasonal worker can have an active status while working in the summer and have an inactive status for rest of the year.

Required system privilege: **View/Add/Edit Users**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Users**.
2. Search for the user and select the user.
3. Click **Inactive** to deactivate the user or click **Active** to reinstate the user.
4. Click **Save and Close** or **Save**.

Passwords and Locked Accounts

Lists the criteria for passwords and includes locked account details.

Password Requirements

Passwords must contain eight to 20 characters and must have at least:

- One lowercase character
- One uppercase character
- One numeric character
- One symbolic character

Passwords can include the following symbols: !"#\$%&'()*+,-./:;<=>?@[\\]^_`{|~

Note:

- If you reset your password and enter a new one, then you cannot use any of your last four passwords.
- Depending on the configuration of your enterprise, passwords expire after either 60 or 90 days.

Locked Account

If you enter the incorrect password six times, then your account will be locked. You can either wait 30 minutes and try again or click **Can't sign in?** from the Oracle MICROS Simphony sign in screen to reset your password.

Reset Another User's Password

Required system privilege: **View/Add/Edit Users**.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Users**.
2. Search for the user and select the user.
3. Click **Reset Password** and then click **Reset Password**.

Reset Your Password

1. In Reporting and Analytics, click your name at the top of the page and then click **Change Password**.
2. Enter your current password, then enter your new password, and then confirm your new password.

3. Click **Save and Close**.

5

API Accounts

API user accounts let you connect to Reporting and Analytics through web services.

Adding API Accounts

Create an API administrator account for managing API user accounts.

Adding an API Administrator Account

1. Add a role for administering API user accounts or edit an existing role.
When you create or edit the role, assign the **API Accounts** system privilege **View/Add/Edit/Delete API Accounts** to the role. For example, create a role named **API User Administration**.
2. Add a user that can administer API user accounts and assign the user to the role you created or edited (for example, **API User Administration**).

Adding API User Accounts

You must have the **View/Add/Edit/Delete API Accounts** privilege to add API accounts.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, click **System**, click **API Accounts**, and then click **Add API Account**.
2. Specify account details as described in the following table. The API for which you are adding the account determines the values that you specify.

Field	Description
Account name	Enter a unique account name.
Email	Enter the user's email address.
Type	Select the feature that the API account will have access to.
Client Scope, Authorization Scope	If you selected Simphony Transaction Services from the Type drop-down, specify the client scope and authorization scope. See Simphony Transaction Services API .
Enterprise Location or Level	If you selected Business Intelligence API , select the locations or levels for which the API returns data.
Data Access Permissions	If you selected Business Intelligence API , specify the type of data the account can access. See Business Intelligence API .

3. Click Add.

A unique **Client ID** value is generated for the API account. Use the ID to authenticate the API account before making API calls to the Reporting and Analytics database. You can retrieve an ID for an account by searching for the account on the API Accounts page and then clicking the account.

The API account user receives a Welcome email with instructions on how to set the password for the account.

4. To edit an account, select it from the account list and make your changes.

Business Intelligence API

The Business Intelligence API lets you query the Reporting and Analytics database on demand for transactional, operational, and kitchen data.

Adding an API Account

The information needed to add an API account depends on the API for which you are adding the account. When you add an account for the Business Intelligence API, select **Business Intelligence API** as the account type. See [Adding API Accounts](#).

Permissions

The following table describes Business Intelligence API permissions for totals and point-of-sale definitions. Assigning any one of the permissions to an API account also grants the API account access to all the point-of-sale definitions.

Data Access Permission	Grants Access to
Sales and Operations	All the operational daily totals, guest checks, non-sale transactions, journal log, and control totals.
Kitchen Performance	Kitchen display system's performance details.
Cash Management	Cash management and cash management adjustment details.
Employee Performance	Employee daily totals.
Labor General	Job code daily totals.
Fiscal	Fiscal invoice data, totals, and invoice control data.
Extensibility	Guest check extensibility data.

The following table describes permissions for definitions only.

Data Access Permission	Grants Access to
Point of sale (POS) definitions	All point of sale definitions.
Personal Identifiable Information	Definitions with personal identifiable information like employees.

Symphony Transaction Services API

Adding an API Account

The information needed to add an API account depends on the API for which you are adding the account. When you add an account for the second generation of the Symphony Transaction Services API, select **Symphony Transaction Services** as the account type. See [Adding API Accounts](#).

Permissions

The following table describes permissions and authorization details for the Symphony Transaction Services Generation 2 API:

Field	Description
Client Scope	Select an API scope as follows: <ul style="list-style-type: none">• BOTH: both location and cloud-based APIs.• LOCAL: location-based APIs.• CLOUD: cloud-based APIs.
Authorization Scope	Select an authorization scope as follows: <ul style="list-style-type: none">• Select All to grant the API account access to the entire enterprise, including all levels and locations.• Select Selected and then click Edit to grant the API account access to specific levels or locations.<ul style="list-style-type: none">– Click Hierarchy to grant access to an entire level of locations.– Click Locations to grant access to individual locations.

Viewing API Activity

Reporting and Analytics lets you view API performance and payload details for the last 7 days.

You must have the **API Activity** privilege to view API activity, view payload details, and manage data available to Oracle.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, click **System**, and then click **API Activity**.
2. On the API Activity page, click the API.
3. Select a date range and then click **Search**.
4. To view the data for a request, click **View Payload** in the request column. To download the data in a JSON file, click **Download**.
5. To view the data for a response, click **View Payload** in the response column. To download the data in a JSON file, click **Download**.
6. To show or hide columns in the search results, click **Manage Columns**.

7. To make data available to Oracle for monitoring and diagnostics, click **Oracle Access**, click **Enable**, and then specify the date and time when the data is no longer available for monitoring and diagnostics.

6

Integrations

Integrate Reporting and Analytics with another application.

Core integrations let you integrate the Symphony platform with other external systems. The integrations are part of the application and are specifically designed to drive the third party application being integrated. This means configuration requirements may differ for the integration itself and also for some Symphony configurations.

CrunchTime! Integration

The integration between Reporting and Analytics and CrunchTime! follows this workflow:

1. Verify Symphony Cloud Service and appropriate CrunchTime! subscriptions and licenses have been purchased.
2. Request enablement of the CrunchTime! integration for your enterprise through your sales representative or customer success manager.
3. Oracle activates the integration.
4. Create your integration account. See [Creating an Integration Account and Required Configuration](#) for more details.
5. Provide account details to CrunchTime! See [Information to Provide to CrunchTime!](#) for more details.
6. Complete the required Reporting and Analytics and Symphony configuration. See [Configure Crunchtime!](#) for more details.
7. CrunchTime! sets up their side of the integration with the information you provided.

Creating an Integration Account and Required Configuration

Setting the Role Permission

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **Roles**.
2. Select the role that should manage CrunchTime! integration accounts, click **Privileges**, and then add the **Manage CrunchTime! Integration** privilege.

Adding an Integration Account

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, click **System**, click **Integrations**, and then click **Add Integration**.
2. In the **Type** field, enter `CrunchTime!` and then complete the details.
3. Click **Save** and take note of the **Authentication Server** URL and the **Client ID**.
4. An email is sent to the specified address. Within the email click **Set Password** and then set your password on the sign in page.

 **Note:**

- This account can't be used to sign in to Reporting and Analytics.

5. After setting the password, a confirmation email is sent.

Required Reporting and Analytics Configuration

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Master Items**, and then click **Service Charges**. For every service charge that is a gift card, click **Edit** and then set the **XBR Category** field to **Gift Card**.
2. Click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Master Items**, click **Menu Items**. For every menu item that represents a gift card or gift card related sale, click **Edit** and then set the **XBR Category** field to **Gift Card**.
3. Click the side navigation menu, click **Configuration**, click **Portal Admin**, click **Organizational Structure**, click **Locations**, click **Edit**, and then assign a time zone to all locations.

Simphony Configuration

If Labor Management is used, then several shift related options must be configured in Simphony.

- Select option #49 – **Enable Shift Tracking** in Control Parameters Enterprise.
- Select option #56 or #57 – **Increment Employee Shift when Clocking Out or Clocking In** in Control Parameters Enterprise.

See the *Oracle MICROS Simphony Configuration Guide* for your Simphony release for more information.

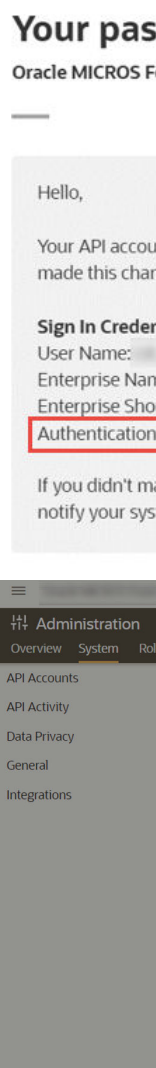
Information to Provide to CrunchTime!

The following table lists the information you must provide to CrunchTime! and where to find each of them within Reporting and Analytics. Contact your CrunchTime! customer success manager or support@crunchtime.com to learn how to submit this information.

 **Tip:**

To see a larger version of an image in the table, right-click the image and open it in a new browser tab.

Information	Set by o c c a t i o n	E x a m p l e
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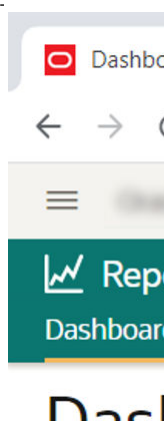


Information	Set by o c c a t i o n	E x a m p l e
	t e g r a t i o n a c c o u n t d i a l o g : c l i c k t h e s i d e m e n u , c l i c k A d m i n	

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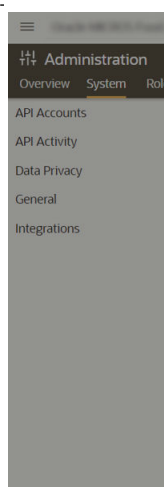
Information	Set by	E x a m p l e
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Information	Set by	E x a m p l e
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Oracle MICROSOFT

Hello,

Your API account made this change.

Sign In Credentials
User Name: [redacted]
Enterprise Name: [redacted]
Enterprise Shortname
Authentication

If you didn't make this change, please notify your system administrator.

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Information	Set by o c c a t i o n	E x a m p l e
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7

Reports

Build original reports, manage the reports on your dashboard, organize your most frequently viewed reports, and create custom reports in Excel with iquery.

Reports are the heart of the Enterprise Back Office system. Each report uses a unique combination of tables, charts, or graphs to provide insight into actionable data for your enterprise. Reports are organized by categories that target specific business operations. For example, some reports target menu items while others compare employee or location performance.

Reporting and Analytics shows report data on the Dashboard and the My Reports page. Your system administrator determines the data you can see and configures your role for access to that data. You can customize the Dashboard and the My Reports page.

The *Oracle MICROS Reporting and Analytics Reports Guide* includes descriptions for reports, details about the information presented, and permissions required to view the reports.

Dashboards

Dashboards contain tiles that show snippets of data from reports. Your system administrator configures a default set of tiles to display on the dashboard according to your role. You can customize the dashboard by adding and removing tiles or by changing the order in which the tiles appear on the dashboard. If you need more information for a tile, click the link under the tile title to view the report that supplies the data to the tile.

Current Hour

Some dashboard tiles use a **Current Hour** indicator. The current hour indicates the latest sales as of the location's local time zone.

If multiple locations are selected with different time zones, then the time shown corresponds to the location in the latest time zone. For example, if location A is in the Pacific Time Zone and location B is in the Eastern Time Zone, then most recent sales as of the time for location B is shown.

If a single location is selected, for example location A, then the latest sales in its local time zone (Pacific Time Zone) are shown.

Adding and Assigning Dashboards

You can add up to 12 report tiles to automatically populate the dashboard for each role. Users can then manage their own dashboard and select different tiles later.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, click **Roles**, and then click the role.
2. Click **Reports Dashboard**.

3. Search for report tiles and click **Select** to add tiles to the dashboard for this role.
4. Click **Save and Close** or **Save**.

Customizing Dashboards

Dashboard tiles are automatically set based on your role. You can customize the tiles displayed and the order they appear. A maximum of 12 tiles can be displayed on the dashboard.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Customize**, and then click **User Defined**.
2. Search for report tiles and click **Select** to add tiles to your dashboard.
3. Click **Save and Close**.

Using Bar Charts

Extra columns appear in some bar charts. If a definition type, for example a menu item or revenue center, is not correctly aligned, then the bar chart displays an extra column named **Group 2**. This occurs when there are two records from different sources with the same **Name** and **POSRef** value. For example two different locations.

To correct this, perform a manual item alignment by merging master items as described in the *Oracle MICROS Reporting and Analytics User Guide*.

Creating Reporting Hierarchies

Establish organizational relationships between locations and levels.

If the organizational hierarchy and the reporting hierarchy are different, then the location results in iQuery and reports will not be aligned.

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Reporting Hierarchies**, and then click **Hierarchies**.
2. Click **Add**.
3. Type a hierarchy name (for example, `District 1`).
4. Add levels to the hierarchy:
 - a. Click the side navigation menu, click **Configuration**, and then click **Reporting Levels**.
 - b. Click **Add**.
 - c. Type a reporting level name (for example, `Free-standing`).
 - d. Click **Save**.
 - e. Repeat these substeps to add more levels.

5. Establish relationships between levels:
 - a. Click the side navigation menu, click **Configuration**, and then click **Reporting Hierarchy Relationships**.
 - b. Select the reporting hierarchy name and then click **Select**.
 - c. Click **Assign Level**.
 - d. Select the level (for example, **Free-standing**).
 - e. Select the parent level. If the level you are assigning is the first level, select **No Parent** from the **Parent Level Name** drop-down list.
 - f. Click **Assign Level**.
 - g. Repeat these substeps to assign more levels.
6. Establish relationships between levels and locations:
 - a. Click **Assign Location**.
 - b. Select the location (for example, **Columbia**).
 - c. Select the parent level for the location (for example, **Free-standing**).
 - d. Click **Assign Location**.
 - e. Repeat these substeps to establish remaining level-location relationships.

Creating Category Groups

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Category Groups**, and then click **Category Groups**.
2. Click **Add**.
3. Enter a name for the category group and then click **Save**.

Creating Category Group Hierarchies

1. To create a category group hierarchy:
 - a. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Category Groups**, and then click **Hierarchies**.
 - b. Click **Add** and then enter a name for the hierarchy.
 - c. Select the category type from the drop-down list and then click **Save**.
2. To add category groups to the hierarchy and to configure parent-child relationships:
 - a. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Category Groups**, and then click **Relationships**.
 - b. Select the hierarchy and then click **Select**.
 - c. To add a category group to the hierarchy, click **Assign Group**, select the group and the parent, and then click **Save**.
 - d. To change the parent-child relationship of a group, select the child group, click **Edit**, change the parent group, and then click **Save**.

Visibility of Gross Sales and Tips

If you are using a Symphony point of sale (POS), you must enable **Employee Shift Tracking** using the increment shift on clock in option to can see **Gross Sales** or **Gross Sales before Discount** and **Tips** in the Time Card Detail report.

See “Configuring Employee Shifts” in the *Oracle MICROS Symphony Configuration Guide* for your Symphony version for more information. Configure Symphony options as follows:

- Select:
 - #49 - Enable Shift Tracking
 - #57 - Increment Employee Shift when Clocking In
- Deselect:
 - #56 - ** Increment Employee Shift when Clocking Out
 - #58 - Increment Employee Shift when Changing Job
 - #59 - Increment Employee Shift when Changing Revenue Center
 - #60 - Prompt to Increment Employee Shift after Shift Report
 - #61 - Prompt before incrementing Employee Shift

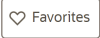
**Note:**

The following POS client functions, which are configured using Page Design, are not compatible with this feature:

- Increment Cashier Shift for Another Employee
- Increment Cashier Shift
- Increment Employee Shift
- Increment Employee Shift for Another Employee

My Reports

Use this space to easily find your preferred reports. The system administrator can add up to 150 reports that are most relevant for your role. You can add up to 150 more reports to this page.

The My Reports page gives you the option to view only your favorite reports by clicking the favorites icon .

Manage My Reports

You can personalize My Reports by adding reports you use often.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **My Reports**, and then click **Manage My Reports**.
2. Select one or more reports you want to add.

3. Click **Save and Close**.

Building Reports

Required system privilege: **Add/Edit/View/Delete Reports**.

The Builder tab lets you create original reports that are tailored to your organization's needs. Each report is composed of one or more report components, such as a table or pie chart. You apply a subject area to each report component and can then select measures or attributes associated with that subject area to include in the report component.

The Builder tab lists these reports and their status. Builder report statuses include:

- **Not Published**: a saved report that you can continue to update.
- **Published**: a complete report that others can view.
- **Published — Update Pending**: a report that was published and then revised, but has not been republished with the changes.
- **Invalid**: the XML code is incorrect for report created with the advanced editor. It must be corrected before publishing is possible.

The *Oracle MICROS Reporting and Analytics Report Designer's Guide* provides details for using the advanced editor.

Building a Report with the Basic Editor

You can build a report with the basic editor that includes your preferred report metrics. The basic editor does not require XML knowledge.

You can begin to build a report without all subject area data permissions, but to preview the report you must have the permissions associated with the report components you select.

Required system privilege: **Add/Edit/View/Delete Reports**.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Builder**, and then click **Add Report**.
2. Enter the report name and description, and then click **Add**.

The creation method field is set to **New** by default. Other options include:

- **Copy**: replicates an existing report.
 - **Sample**: shows a sample report with examples of the report components.
3. Review the **Publish Details** information that will appear on the report preview when published.
 - a. Select the **Report Category**. You can select any existing core report category, depending on the use case of the custom report.
 - b. Enter a **Report Name**.
 - c. Enter a **Report Description**.
 - d. Enter **Report Tags**.

4. The **Basic** editor is selected by default.
5. Click **Add** and select type of component or click the report component icon.
6. Enter component details:

Report Component	Details
Table	<ol style="list-style-type: none"> a. Name the table. b. Select a Subject Area, this selection will populate the table column options. c. Select a column from Add a Table Column and click Add. Repeat this process to add more columns. You can also rename the default column names and adjust the order in which they appear. d. Select a Sort by Column. e. Click Apply.
Bar or Line Chart	<ol style="list-style-type: none"> a. Name the chart. b. Select a Subject Area, this selection will populate options in the other fields. c. You can adjust the layout of the bar or line chart by selecting the Measure Type, Chart Type, and Y-Axis Type. d. Select the Aggregation, Attribute, and Measure or measures. e. Select the Style to determine the chart type. f. Click Apply.
Pie Chart	<p>If selecting a pie chart, negative values do not appear in pie charts created with the basic editor. Use the advanced editor if you want to include these values.</p> <ol style="list-style-type: none"> a. Name the pie chart. b. Select the Aggregation, Measure, and Series. c. Click Apply.

7. Add another report component or move to the next step.
8. Click:
 - **Save and Run Preview** to review the report and publish.
 - **Save** to publish the report later.
 - **Save As** to create a working copy of new changes, but do not want to make permanent changes to the existing report. This action creates a new report with your changes and does not make changes to the original report.

9. Click **Publish** if the report is complete or click **Definition** to edit the report.
10. Review the card preview information and then click **Publish**.

Building a Report with the Advanced Editor

The advanced report builder feature gives you more freedom to personalize reports than the basic builder, though it requires XML knowledge. The *Oracle MICROS Reporting and Analytics Report Designer's Guide* provides details for using the advanced editor.

You can begin to build a report without all subject area data permissions, but to preview the report you must have those permissions.

Required system privilege: **Add/Edit/View/Delete Reports**.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Builder**, and then click **Add Report**.
2. Enter the report name and description, and then click **Add**.

The creation method field is set to **New** by default. Other options include:

- **Copy**: replicates an existing report.
 - **Sample**: shows a sample report with an example of the XML.
3. Review the **Publish Details** information that will appear on the report preview when published.
 - a. Select the **Report Category**. You can select any existing core report category, depending on the use case of the custom report.
 - b. Enter a **Report Name**.
 - c. Enter a **Report Description**.
 - d. Enter **Report Tags**.
 4. Click the **Advanced** layout.
 5. Enter XML text.
 - For examples of the XML text used to create report components, click **Sample** in step 2.
 - Use the subject area search feature to search for a measure or attribute, for example `Net Sales`, and view the subject areas associated with it. The alias for each subject area, measure, or attribute is in parentheses. When adding XML text, you must use the alias.
 - You can use the basic editor to add report components and then go back to the advanced editor to see the XML text. However, certain changes to the XML text with the advanced editor are not supported in the basic editor.
 6. Click **Verify XML** to check for errors.
 7. Click:
 - **Save and Run Preview** to review the report and publish.
 - **Save** to publish the report later.

- **Save As** to create a working copy of new changes, but do not want to make permanent changes to the existing report. This action creates a new report with your changes and does not make changes to the original report.
8. Click **Publish** if the report is complete or click **Definition** to edit the report.
 9. Review the card preview information and then click **Publish**.

Revising a Published Report

Required system privilege: **Add/Edit/View/Delete Reports**



Note:

You must be the owner of the report to revise it. See the “Transferring Ownership of a Report” section for more details.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Builder**, and then click the published report you want to revise.
2. Click the **Revision** tab.
During the revision process, you can click **Revert** to restore the report to the published version.
3. Make your updates to the report and click **Save and Run Preview**.
 - If you want to publish the report later, click **Save**.
4. Click **Republish** if the report is complete or click **Definition** to edit the report.
5. Review the card preview information and then click **Republish**.

Transferring Ownership of a Report



Required system privileges: **Transfer Ownership of Reports** and **Add/Edit/View/Delete Reports**.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Builder**, and then click the report you want to transfer.
2. Click **Owner**.
3. Select a new owner and then click **Save and Close** or **Save**.


Running Reports

You can enable auto run if you want the report to use the same parameters, like location or business date, each time someone opens the report. Disable auto run if

you expect most users to change the parameters when they view the report. For example, an organization with hundreds of locations may want to disable auto run so a user does not have to wait for the report to run before editing the parameters and running it again for their specific location.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **My Reports** or **Library**, and then select the report.
2. Click **Edit Parameters**, select parameters, and then click **Run**.
3. To enable auto run, select the auto run icon .
4. To disable auto run, deselect the auto run icon .

Saving Report Parameters

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **My Reports** or **Library**, and then select the report.
2. Click to the right of **Parameter Name** and select one of the following:
 - a. **Save** — to save these parameters and run the report with them in the future.
 - b. **Save As** — to create a new version of this report that runs with your preferred parameters. After clicking **Save As**, enter a name for the parameter that will appear on the report tile, and click **Save and Run**. Your new version will appear in My Reports and in the Library with a saved icon . The original version will also appear.
 - c. **Restore Default** — to return the parameters to their original settings.
 - d. **Delete Save As** — to delete the Save As version.

VAT and GST Tax Labels

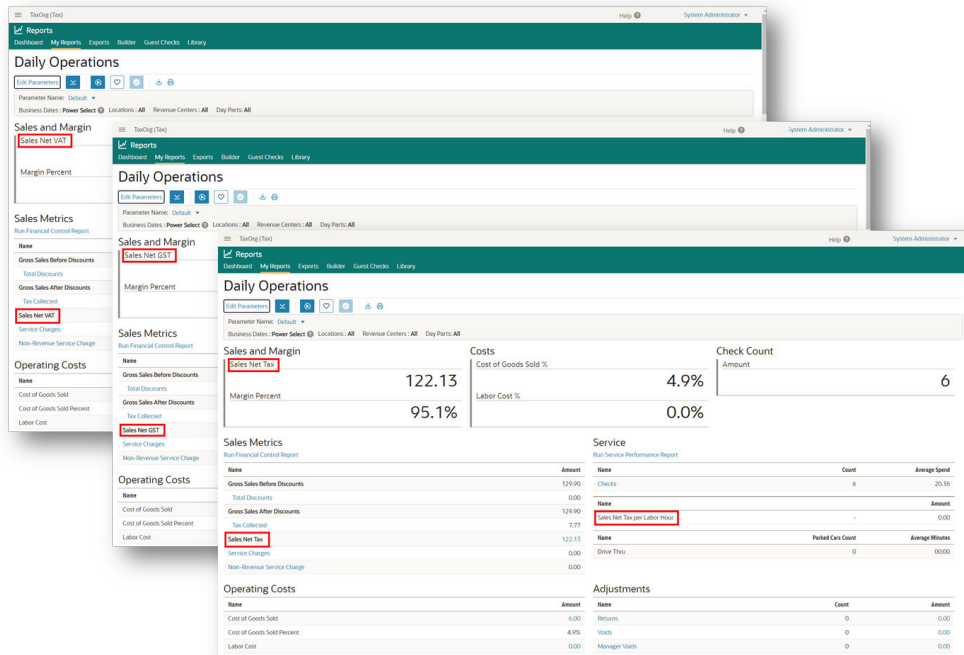
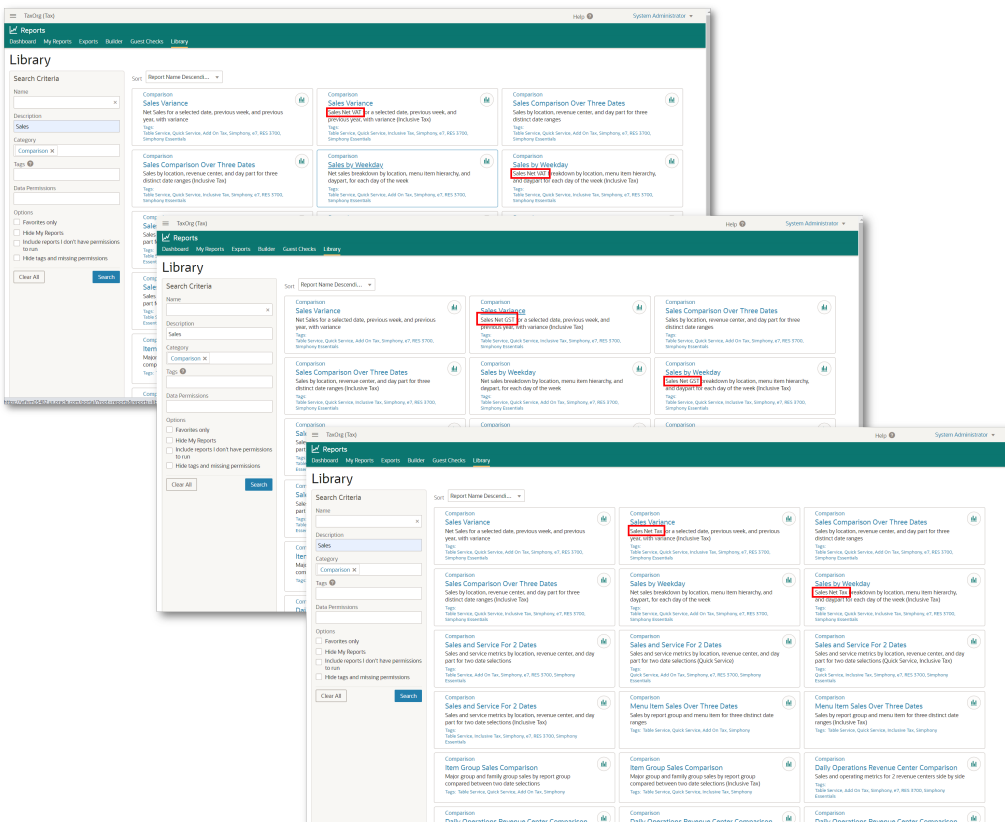
The inclusive tax reports are designed to work for VAT and Australian GST tax configurations.

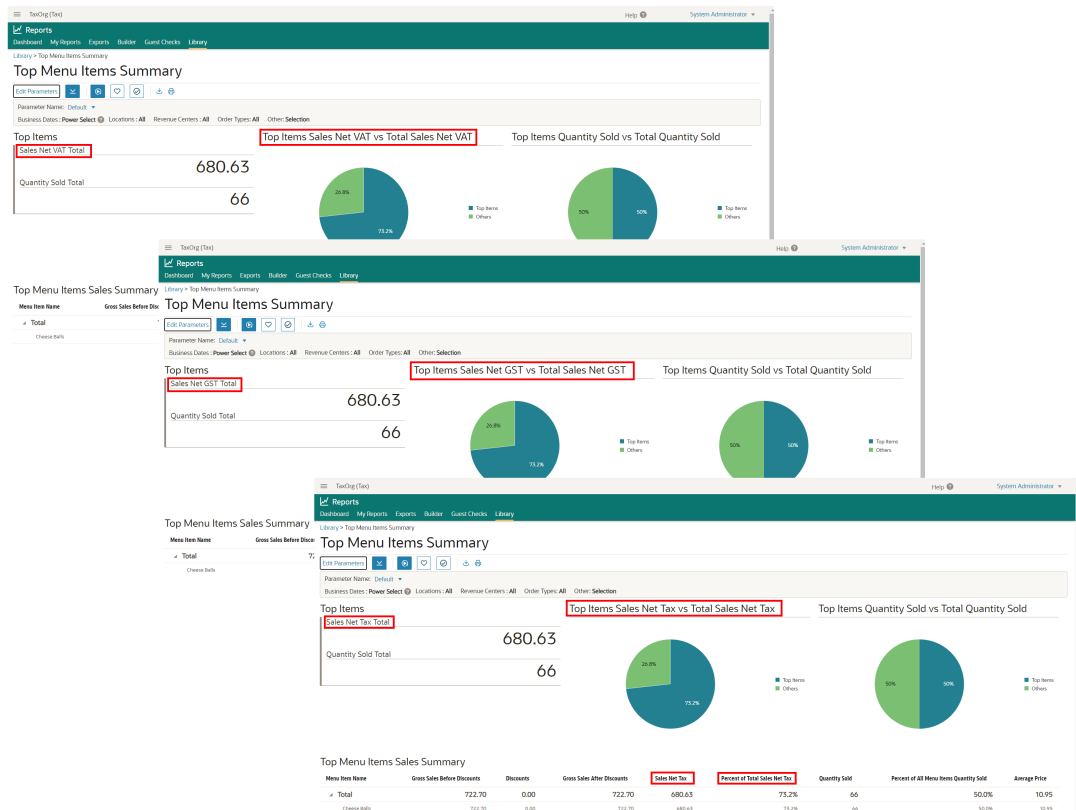
You can change labels on certain reports to fit the needs of your enterprise. For example, tax configurations in Australia must use the goods and services tax label **GST** instead of **VAT**. There is also an option to use a more generic label that you can apply to both VAT and GST locations within your enterprise. The GST label is only supported for Australian GST taxes.

These label changes are applied to the report names, descriptions, and component titles. They also appear on dashboard tiles, when applicable. Dashboard tile label details and a full list of reports with available label changes are listed below.

To change these labels, see [Editing Sales and Tax Labels](#).

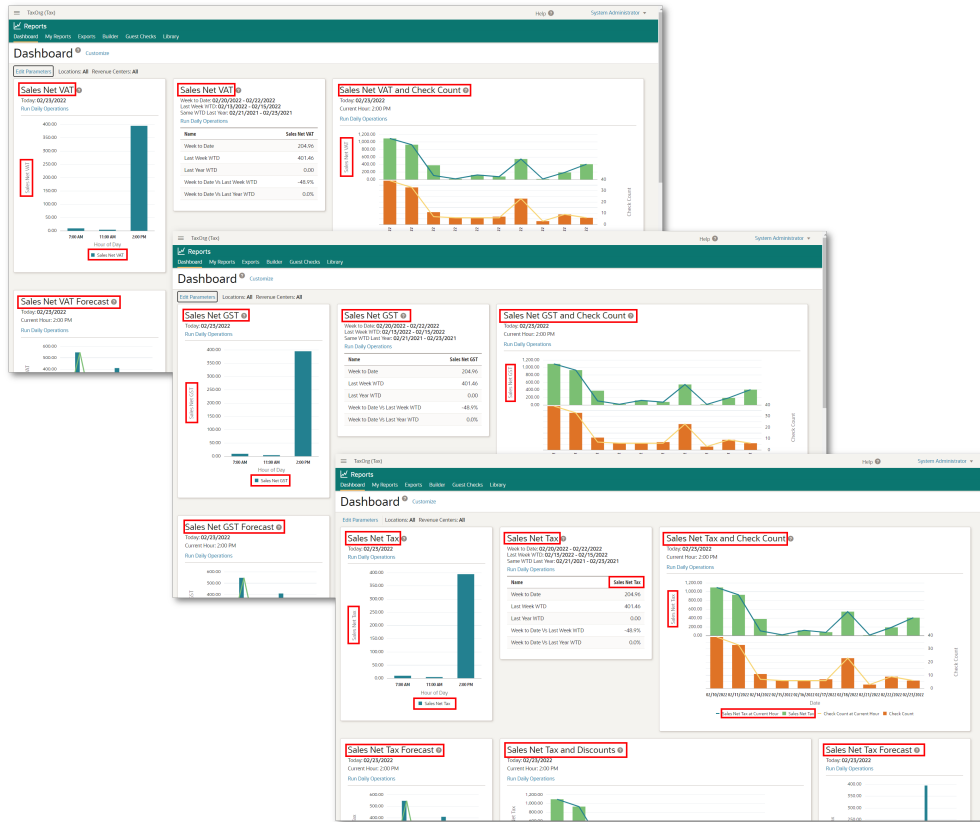
Examples of the different VAT, GST, and generic labels are shown in the following images.





Dashboard Tile Labels

- Dashboard tiles that include **Sales Net VAT** in the report name support both VAT and GST tax configurations and labels, including “Sales Net GST” or “Sales Net Tax”.
- Dashboard tiles that include **(Inclusive Tax)** in the description support both VAT and GST tax configurations and labels.



Reports with VAT and GST Data

The table below lists all reports used specifically for VAT and Australian GST purposes. They have sales metrics that are dependent on the tax configuration and calculations.

Reports with the label change option are noted in the final column. The reports without the label change option do not use specific VAT or GST tax labels.

Report Category	Report Name	Label Change Option?
Summary	<ul style="list-style-type: none"> Daily Operations (Table Service Restaurant, Inclusive Tax) Daily Operations (Quick Service Restaurant, Inclusive Tax) 	Yes
Summary	<ul style="list-style-type: none"> Daily Operations Summary (Table Service Restaurant, Inclusive Tax) Daily Operations Summary (Quick Service Restaurant, Inclusive Tax) 	Yes
Summary	<ul style="list-style-type: none"> Income Audit by Discount (Inclusive Tax) 	Yes

Report Category	Report Name	Label Change Option?
Summary	<ul style="list-style-type: none"> Income Audit by Major Group (Inclusive Tax) 	Yes
Summary	<ul style="list-style-type: none"> Serving Period Summary Report (Inclusive Tax) 	No
Daily Detail	<ul style="list-style-type: none"> Closed Checks (Table Service Restaurant, Inclusive Tax) Closed Checks (Quick Service Restaurant, Inclusive Tax) 	Yes
Daily Detail	<ul style="list-style-type: none"> Closed Checks by Tender Type (Inclusive Tax) 	Yes
Daily Detail	<ul style="list-style-type: none"> Cost of Goods Sold (Inclusive Tax) 	No
Daily Detail	<ul style="list-style-type: none"> Discounts (Inclusive Tax) 	No
Daily Detail	<ul style="list-style-type: none"> Key Performance Indicators by Workstation (Inclusive Tax) 	Yes
Daily Detail	<ul style="list-style-type: none"> Labor Summary (Inclusive Tax) 	Yes
Daily Detail	<ul style="list-style-type: none"> Sales by Tax Type (Inclusive Tax) 	Yes
Daily Detail	<ul style="list-style-type: none"> Table Sales (Inclusive Tax) 	Yes
Daily Detail	<ul style="list-style-type: none"> Taxes (Inclusive Tax) 	Yes
Operations Performance	<ul style="list-style-type: none"> Budget and Forecast Comparison by Location, Revenue Center, and Business Date (Table Service Restaurant, Inclusive Tax) Budget and Forecast Comparison by Location, Revenue Center, and Business Date (Quick Service Restaurant, Inclusive Tax) 	Yes
Operations Performance	<ul style="list-style-type: none"> Employee Exceptions (Table Service Restaurant, Inclusive Tax) Employee Exceptions (Quick Service Restaurant, Inclusive Tax) 	No

Report Category	Report Name	Label Change Option?
Operations Performance	<ul style="list-style-type: none"> Employee Financial (Inclusive Tax) 	No
Operations Performance	<ul style="list-style-type: none"> Employee Productivity (Table Service Restaurant, Inclusive Tax) Employee Productivity (Quick Service Restaurant, Inclusive Tax) 	No
Operations Performance	<ul style="list-style-type: none"> Historic Totals (Inclusive Tax) 	Yes
Operations Performance	<ul style="list-style-type: none"> Operations Analysis (Table Service Restaurant, Inclusive Tax) Operations Analysis (Quick Service Restaurant, Inclusive Tax) 	Yes
Operations Performance	<ul style="list-style-type: none"> Service Performance (Table Service Restaurant, Inclusive Tax) Service Performance (Quick Service Restaurant, Inclusive Tax) 	Yes
Operations Performance	<ul style="list-style-type: none"> Speed of Service (Table Service Restaurant, Inclusive Tax) Speed of Service (Quick Service Restaurant, Inclusive Tax) 	Yes
Operations Performance	<ul style="list-style-type: none"> System Financial (Inclusive Tax) 	Yes
Comparison	<ul style="list-style-type: none"> Daily Operations Date Comparison (Table Service Restaurant, Inclusive Tax) Daily Operations Date Comparison (Quick Service Restaurant, Inclusive Tax) 	Yes

Report Category	Report Name	Label Change Option?
Comparison	<ul style="list-style-type: none"> Daily Operations Location Comparison (Table Service Restaurant, Inclusive Tax) Daily Operations Location Comparison (Quick Service Restaurant, Inclusive Tax) 	Yes
Comparison	<ul style="list-style-type: none"> Daily Operations Revenue Center Comparison (Table Service Restaurant, Inclusive Tax) Daily Operations Revenue Center Comparison (Quick Service Restaurant, Inclusive Tax) 	Yes
Comparison	<ul style="list-style-type: none"> Item Group Sales Comparison (Inclusive Tax) 	Yes
Comparison	<ul style="list-style-type: none"> Key Performance Indicator Comparison (Table Service Restaurant, Inclusive Tax) Key Performance Indicator Comparison (Quick Service Restaurant, Inclusive Tax) 	Yes
Comparison	<ul style="list-style-type: none"> Sales and Service For 2 Dates (Table Service Restaurant, Inclusive Tax) Sales and Service For 2 Dates (Quick Service Restaurant, Inclusive Tax) 	Yes
Comparison	<ul style="list-style-type: none"> Sales Comparison Over Three Dates (Inclusive Tax) 	Yes
Comparison	<ul style="list-style-type: none"> Sales Variance (Inclusive Tax) 	Yes
Comparison	<ul style="list-style-type: none"> Sales by Weekday (Inclusive Tax) 	Yes

Report Category	Report Name	Label Change Option?
Comparison	• Service by Weekday (Table Service Restaurant, Inclusive Tax)	No
	• Service by Weekday (Quick Service Restaurant, Inclusive Tax)	
Menu Item Sales and Performance	• Combo Items Summary (Inclusive Tax)	Yes
Menu Item Sales and Performance	• Employee Sales Mix (Inclusive Tax)	No
Menu Item Sales and Performance	• Menu Item Sales Comparison (Inclusive Tax)	Yes
Menu Item Sales and Performance	• Menu Item Sales over Three Dates (Inclusive Tax)	Yes
Menu Item Sales and Performance	• Menu Engineering (Inclusive Tax)	Yes
Menu Item Sales and Performance	• Menu Item Affinity (Inclusive Tax)	Yes
Menu Item Sales and Performance	• Sales Analysis (Inclusive Tax)	Yes
Menu Item Sales and Performance	• Sales by Major Group Type (Inclusive Tax)	Yes
Menu Item Sales and Performance	• Sales Mix (Inclusive Tax)	Yes
Menu Item Sales and Performance	• Top Menu Items Summary (Inclusive Tax)	Yes
Drill-Down	• Check Detail (Inclusive Tax)	Yes
Drill-Down	• Income Audit by Family Group (Inclusive Tax)	Yes

Editing Sales and Tax Labels

You can edit certain report labels to use either VAT, GST, or generic labels. Label changes are applied in every instance that the label appears. For example, not only is the report name changed, but so are all report components and descriptions that include the label.

This is an enterprise-wide setting that applies to all locations and users, independent of their actual POS configuration.

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Enterprise Options**.

- From **Inclusive Tax Report Naming Convention**, select the label options you want to use for your enterprise. The default option is **use Value Added Tax (VAT) labels**. The table below lists the report naming options and their associated labels that appear on the report.



Table 7-1 Report Label Options

use Value Added Tax (VAT) labels	use Australian Goods and Services Tax (GST) labels	use generic labels
Sales Net VAT	Sales Net GST	Sales Net Tax
Net VAT before Discount	Net GST before Discount	Net Tax before Discount
Net VAT after Discount	Net GST after Discount	Net Tax after Discount
Discount VAT	Discount GST	Discount Tax
VAT Total	GST Total	Tax Total
Discounts Amount Net VAT	Discounts Amount Net GST	Discounts Amount Net Tax
Taxable Sales Net VAT	Taxable Sales Net GST	Taxable Sales Net Tax
All Sales Net VAT	All Sales Net GST	All Sales Net Tax

- Click **Save**.

Exporting Reports

You can export reports into Microsoft Excel, save them as a PDF, or print them.

- In Reporting and Analytics, click the side navigation menu, click **Reports**, click **My Reports** or **Library**, and then select the report.
- To download the report, click the  icon.
 - Select **Microsoft Excel (.xlsx)** and then open the downloaded file to export the data as it appears in the report.
 - Select **Comma-Separated Values (csv)** and then open the downloaded file to export the data in plain text.
- To save as a PDF or print the report, click the  icon.

Note:

The appearance of tiles and reporting data on the PDF output reflects the view of the portal when printed. For example, if you expand or collapse certain elements in a table, then that will be reflected in the PDF.

Custom Reports in Microsoft Excel

iQuery is a Microsoft Excel add-in that lets you export data to Microsoft Excel and then create reports using selected data subject areas.

The subject areas that you can work with in the add-in depend on how your administrator configured your role. If your administrator did not assign all required data permissions for a subject area to your role, that subject area does not appear in the add-in.

For example, if you want a start-of-day report that replaces the Operating Metrics section of the Daily Operations Summary report with information about the three best-selling items for that day and some labor performance and efficiency analysis, you can create a report with the fields you want to see. You can then save the custom report into Reporting and Analytics so you can launch the report from the sidebar.

Supported Microsoft Excel versions for iQuery are Microsoft Excel 2013, Microsoft Excel 2016, and Microsoft Office 365.

Data Permissions for iQuery

The following table lists each subject area available in iQuery and the corresponding data permissions that are required to view that subject area.

To gain access to these data permissions, contact your system administrator.

Subject Area	Data Permission
Gift and Loyalty Customer Summary	<ul style="list-style-type: none"> • Gift and Loyalty General • Customer Identifiable Information • Sales and Operations
Gift and Loyalty Customer Transaction Summary	<ul style="list-style-type: none"> • Gift and Loyalty General • Customer Identifiable Information • Sales and Operations
Discount Daily Total	<ul style="list-style-type: none"> • Sales and Operations
Discount Daily Total (Common Currency)	<ul style="list-style-type: none"> • Sales and Operations
Discount Fixed Period Total	<ul style="list-style-type: none"> • Sales and Operations
Employees	<ul style="list-style-type: none"> • POS Definitions • Employee Identifiable Information • Sensitive Identifiable Information • Labor General
Employee Daily Total	<ul style="list-style-type: none"> • Labor General • Sales and Operations • Employee Performance
Employee Job Rates	<ul style="list-style-type: none"> • Labor General • Employee Identifiable Information • Hourly Pay Rates • Salaried Pay Rates

Subject Area	Data Permission
Employee Job Code Daily Total	<ul style="list-style-type: none"> • Labor General • Employee Performance • Hourly Pay Rates • Salaried Pay Rates
EMS Menu Items	<ul style="list-style-type: none"> • POS Definitions
Enterprise Employees	<ul style="list-style-type: none"> • POS Definitions • Employee Identifiable Information • Labor General • Sensitive Identifiable Information
Enterprise Employee Job Rate	<ul style="list-style-type: none"> • POS Definitions • Employee Identifiable Information • Labor General • Hourly Pay Rates • Salaried Pay Rates
Enterprise Time Cards	<ul style="list-style-type: none"> • Labor General • Employee Time Card Details • Hourly Pay Rates • Salaried Pay Rates • Sales and Operations • Employee Identifiable Information
Enterprise Time Card Adjustments	<ul style="list-style-type: none"> • Labor General • Employee Time Card Details • Hourly Pay Rates • Salaried Pay Rates • Sales and Operations • Employee Identifiable Information
Financial Form Detail	<ul style="list-style-type: none"> • Financial Forms
Financial Form Ledger Detail	<ul style="list-style-type: none"> • Financial Forms
Guest Checks (Current Business Date)	<ul style="list-style-type: none"> • Sales and Operations
Discount Transaction Details (Current Business Date)	<ul style="list-style-type: none"> • Sales and Operations
Discount Transaction Details	<ul style="list-style-type: none"> • Sales and Operations
Menu Item Transaction Details (Current Business Date)	<ul style="list-style-type: none"> • Sales and Operations
Service Charge Transaction Details (Current Business Date)	<ul style="list-style-type: none"> • Sales and Operations
Tender/Media Transaction Details (Current Business Date)	<ul style="list-style-type: none"> • Sales and Operations
Gift and Loyalty Account	<ul style="list-style-type: none"> • Gift and Loyalty General • Customer Identifiable Information
Gift and Loyalty Transaction	<ul style="list-style-type: none"> • Gift and Loyalty General • Sales and Operations
Gift and Loyalty Customer Detail	<ul style="list-style-type: none"> • Gift and Loyalty General • Customer Identifiable Information

Subject Area	Data Permission
Gift and Loyalty CA Customer Program	<ul style="list-style-type: none"> • Gift and Loyalty General • Sales and Operations • Customer Identifiable Information
Gift and Loyalty CA Email Offers	<ul style="list-style-type: none"> • Gift and Loyalty General • Customer Identifiable Information
Gift and Loyalty CA Email Sent Opened	<ul style="list-style-type: none"> • Gift and Loyalty General
Gift and Loyalty Coupon	<ul style="list-style-type: none"> • Gift and Loyalty General • Customer Identifiable Information
Gift and Loyalty Coupon Types	<ul style="list-style-type: none"> • Gift and Loyalty General
Gift and Loyalty Customer Overview	<ul style="list-style-type: none"> • Gift and Loyalty General • Customer Identifiable Information
Gift and Loyalty Program	<ul style="list-style-type: none"> • Gift and Loyalty General
Gift and Loyalty Redeemed Coupon	<ul style="list-style-type: none"> • Gift and Loyalty General • Customer Identifiable Information
Inventory Daily Total	<ul style="list-style-type: none"> • General Inventory • Theoretical Stock on Hand
Job Code Daily Total	<ul style="list-style-type: none"> • General Labor • Hourly Pay Rates • Salaried Pay Rates
Job Code Fixed Period Total	<ul style="list-style-type: none"> • General Labor • Hourly Pay Rates • Salaried Pay Rates
Labor Category Daily Total	<ul style="list-style-type: none"> • General Labor • Hourly Pay Rates • Salaried Pay Rates
Labor Category Total (Common Currency)	<ul style="list-style-type: none"> • General Labor • Hourly Pay Rates • Salaried Pay Rates
Labor Category Fixed Period Total	<ul style="list-style-type: none"> • General Labor • Hourly Pay Rates • Salaried Pay Rates
Menu Item Daily Total	<ul style="list-style-type: none"> • Sales and Operations
Menu Item Daily Total (Common Currency)	<ul style="list-style-type: none"> • Sales and Operations
Menu Item Fixed Period Total	<ul style="list-style-type: none"> • Sales and Operations
Non Sales Transaction Details	<ul style="list-style-type: none"> • Sales and Operations
Operations Daily Total	<ul style="list-style-type: none"> • Sales and Operations
Operations Daily Total (Common Currency)	<ul style="list-style-type: none"> • Sales and Operations
Operations Fixed Period Total	<ul style="list-style-type: none"> • Sales and Operations
Operation Fixed Period Total (Common Currency)	<ul style="list-style-type: none"> • Sales and Operations
Other Pay	<ul style="list-style-type: none"> • General Labor • Hourly Pay Rates • Salaried Pay Rates • Employee Identifiable Information

Subject Area	Data Permission
Other Pay Adjustments	<ul style="list-style-type: none"> • General Labor • Hourly Pay Rates • Salaried Pay Rates • Employee Identifiable Information
Service Charge Daily Total	<ul style="list-style-type: none"> • Sales and Operations
Service Charge Fixed Period Total	<ul style="list-style-type: none"> • Sales and Operations
Tax Daily Total	<ul style="list-style-type: none"> • Sales and Operations
Tender Daily Total	<ul style="list-style-type: none"> • Sales and Operations
Tender Daily Total (Common Currency)	<ul style="list-style-type: none"> • Sales and Operations
Tender Fixed Period Total	<ul style="list-style-type: none"> • Sales and Operations
Time Cards	<ul style="list-style-type: none"> • General Labor • Employee Time Card Details • Hourly Pay Rates • Salaried Pay Rates • Sales and Operations • Employee Identifiable Information
Time Card Adjustments	<ul style="list-style-type: none"> • General Labor • Employee Time Card Details • Hourly Pay Rates • Salaried Pay Rates • Sales and Operations • Employee Identifiable Information

Installing iQuery

1. Close Microsoft Excel if it is open.
2. In Reporting and Analytics, click the side navigation menu, click **Reports**, and then click either **My Reports** or **Builder**.
3. Click **Download iQuery** and then click **Download**.
4. Double-click the `iQuerySetup.exe` file and then follow the prompts to install the software.
5. Validate the installation:
 - a. Open Microsoft Excel.
 - b. Locate the iQuery plug-in, and then open iQuery.
The location varies depending on the version of Microsoft Excel. For example, in Microsoft Excel 2013, access iQuery from the **ADD-INS** ribbon.
 - c. Log in to iQuery.

Building a Custom Report in Microsoft Excel

1. Select a query subject.
2. Select the column data that appears in the spreadsheet when you run the query.

Use the up and down arrows to adjust the order of the columns in the spreadsheet. For example, if you move a column to the top of the list, that column is the first column in the spreadsheet.

3. To apply a mathematical operation to column data, select it from the **Operation** drop-down list.
4. Specify filters to refine query results:
 - a. Select a business date or date range.
 - b. Select locations.
 - c. Select revenue centers for the locations.
 - d. Select other filters.

If the organizational hierarchy and the reporting hierarchy are different, then the location results in iQuery and reports will not be aligned.

5. Define the order in which iQuery sorts the data.
6. Click **Preview** to verify that the query returns the correct results.

If the preview does not return results or returns too many rows, change query settings and then preview the query again.

7. Click **Run** to show the results in Microsoft Excel.
8. Save the query.

To save the query on your computer so you can run it at a later time from Microsoft Excel, click **Query**. iQuery does not save the business date because you change the date each time you run the query.

To save the query as a report, click **Report**. Users assigned to the role for accessing custom reports can run the report from Reporting and Analytics.

 **Note:**

- When you save the query as a report, it is available for all other users with the same role.
- The report is not added to the My Reports page automatically, but you can add it manually.


Searching for Guest Checks

Reporting and Analytics lets you retrieve guest check details.

Required system privilege: **Sales and Operations**

This feature lets you search for guest checks that match certain search criteria. For example, if a customer calls to get a copy of their receipt you can narrow down the list of guest checks based on search criteria.

 **Note:**

When drilling down into the check details, an information icon  is displayed if you don't have the **Payment Processing** data permission. The Payment Processing report components and required data permission are only available for customers using the Payment Cloud Service.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, and then click **Guest Checks**.
2. Specify the search criteria and then click **Search**.

 **Note:**

- The business date range that you can select is limited to a maximum of 7 days.
- You can use % as a wildcard character in the **Check Employee First Name** or the **Check Employee Last Name** fields. Enter the first letters of your search term and then add % to the end to represent one or more other characters. For example, you can search all employees with a first name starting with the letter J by searching J%.

3. Select the check to view the Check Detail report.

Within the report, you can download or print the report. If using Symphony, you can drill down further to see the POS transaction view. For more details about the Check Detail report, see the *Oracle MICROS Reporting and Analytics Reports Reference Guide*.

Retrieving Transaction Information with Audit & Analysis

1. In Reporting and Analytics, click the side navigation menu, click **Reports and Check Search**, and then click **Audit & Analysis**. If you cannot find the link, contact your system administrator so that you can gain access to the **Audit & Analysis** portlet.
2. In the **Create New Queries** section, click the query type.
For example, click **Transaction Detail** to build a query based on specific transaction details such as menu items. Your role and user type determines the queries you can create.
3. Click **Locations** at the top of the page and then select the location.
4. Click **Business Dates** and then select dates:
 - a. To use a fiscal calendar, select **Financial**. Contact your system administrator to verify your organization uses a fiscal calendar.
 - b. To use a pre-defined date or date range, select it from the **Quick Select** drop-down list.
 - c. Select the year.
 - d. To select dates from the calendar grid:

- Click a single day.
 - Click the month name to select all the days in the month.
 - Click the day column header to select all those days in the month.
 - Click the numbered week to select all the days in that week.
 - Press and hold the **Ctrl** key to select multiple days.
5. Click **Filters**, and then specify criteria to limit the query to a useful set of results, as described in the following table:

Table 7-2 Audit and Analysis Filters

Filter	Description
Item Types	Filters by discounts, menu items (Transaction Detail only), service charges (Transaction Detail only), and tender media associated with the check.
General	Filters by general transaction information. The query type determines the general criteria you can define.
Workstation (Transaction Detail only)	Filters results by checks generated from workstations at locations.
Day Parts	Filters by checks generated during parts of a day configured for your organization. Examples of day parts include breakfast, lunch, dinner, and late night. You can also select 15-minute intervals within an hour.
Order Types	Filters by order types configured for your organization.
Revenue Centers	Filters by revenue center. For example, you can filter on guest check transactions from the bar or restaurant.
Customer (Transaction Summary only)	Filters by customer information associated with transactions. For example, you can filter by the name on the credit card a customer used for the transaction.
Employee	Filters by employee information associated with transactions. For example, you can filter by all transactions for check employee Brian Smith.
Tax (Transaction Summary only)	Filter by tax information associated with transactions.

6. Click **Format** and define query output settings:
- a. Select the output type.
 - b. To show location-specific names of menu items, tender and media, discounts, and service charges in the query, select **Use location names rather than master names**.
Clearing this option shows the names from the master definition table.
 - c. Select the columns that appear in the query and then define how the column data appears in the query.

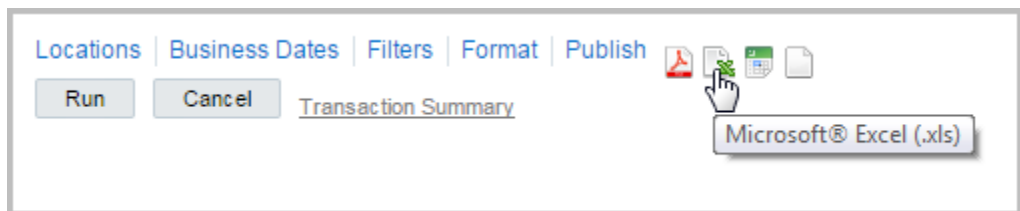
For example, you can group data by revenue center in ascending order. To apply a mathematical operation, select the operation from the **Function** column.

7. Click **Run** to run the query.
8. Click **Publish** to save the query and make it available to other users:
 - a. Type a name and description for the query.
 - b. On the **Publish To** tab, specify if the members of a role or specific users can run the query.
 - c. On the **Prompted Filters** tab, select the filters that other users can set when running the published query.
 - d. Click **Save**.

The query appears in the **Public Queries** section on the Audit & Analysis page.

Exporting Audit & Analysis Queries

1. Build and run an Audit & Analysis query or run a published query.
2. Click the export format icon as shown in the following example:



8

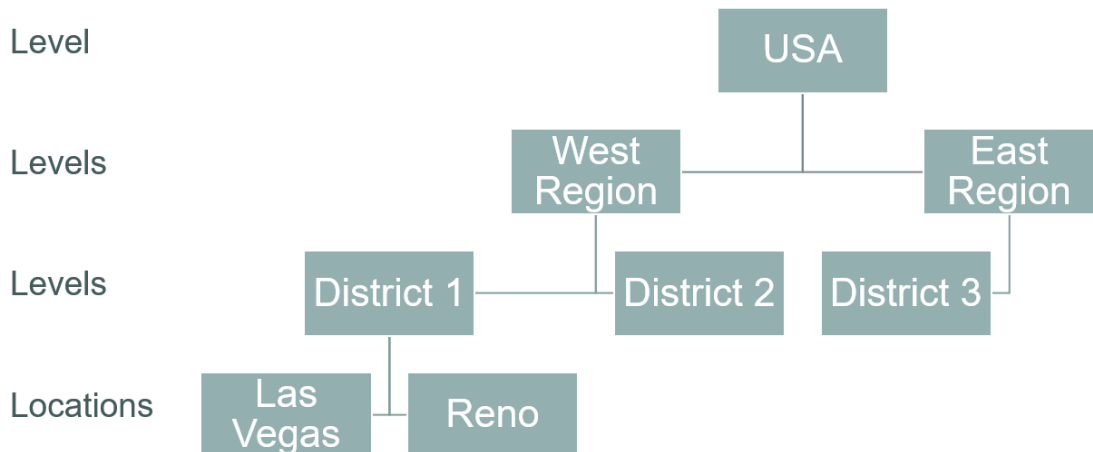
Organizational Hierarchies

Create and link revenue centers, locations, and levels of the organization.

The enterprise has only one organizational hierarchy, which provides structure for an enterprise and its locations. The hierarchy ensures totals from all locations are available for reports and it controls how charts show information in Reporting and Analytics. If the organizational hierarchy and the reporting hierarchy are different, then the location results in iQuery and reports will not be aligned.

The organizational hierarchy consists of levels and locations. A location is a restaurant. A level is a group of locations or a group of levels. You define the hierarchy by creating parent-child relationships between levels and locations. In the following figure of a sample organizational hierarchy, District 1 is the parent to the Las Vegas and Reno locations, and the West Region is the parent to District 1 and District 2.

Figure 8-1 Example Organizational Hierarchy



You can use the organizational hierarchy to determine user access to information in the system. Using the sample hierarchy as a model, you can create a District Manager role and then assign the role to the District Manager for District 1. Because of the system relationship between District 1 and the Las Vegas and Reno locations, the District Manager can only see information for those locations and cannot see information for the locations related to the other districts.

Revenue Centers

Revenue centers let organizations categorize revenue data by function within a location. At a fast food restaurant, each register and the drive-thru are examples of revenue centers. At a table service restaurant, the bar and dining area are examples of revenue centers.

If your organization is configured for revenue centers, Reporting and Analytics lets you filter by revenue center when you modify and run standard reports. You can also filter by revenue center when you use iQuery to work with reporting data in Microsoft Excel.

Adding Levels

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Portal Admin**, click **Organizational Structure**, and then click **Levels**.
2. Click **Add**.
3. In the **Name** field, enter a level name.
For example, enter `District 1` for a district level or type `East` to for a region level.
4. Enter a **Level Reference** to indicate the level position within the organizational hierarchy.
Use a value of `0` if the level is the highest corporate level in the organization. Use text or numbers when adding lower levels to the organization. For example, you can use `10` for one district and `20` for another district.
5. Select the **Financial Calendar** for the level.
For example, if the organization uses a financial calendar based on a fiscal year, select the corresponding calendar.
6. Specify values for basic level settings on the form, such as address and postal code, and then click **Save**.

Adding Locations

Starting with release 20.1.10, you cannot add or edit property details in Reporting and Analytics if your Reporting and Analytics application is connected to Symphony. In this case, property details are read-only in Reporting and Analytics and you must add or edit property details in the Symphony Enterprise Management Console (EMC).

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Portal Admin**, click **Organizational Structure**, and then click **Locations**.
2. Click **Add**.
3. Specify values for the remaining settings on the form and then click **Save**.

The following table lists the fields with a description and several examples.

When using Oracle Payment Cloud Service, you must complete the required fields which include:

- Region
- Address Line 1
- Address Line 2
- Address Line 3
- Postal Code
- Municipality/City
- Country

- Phone and Fax

Field	Description
Name	Enter a unique name of the location. For example, <i>Italian Restaurant</i> .
Location Reference	Enter an alphanumeric external reference for this location. It is often used in data exports to downstream systems to identify a location and map it to an external system, so changing the value has an impact. For example, <i>Loc1</i> .
Labor Program	Select the labor program.
Region	Select the state.
Language	Select a language.
Number Workstations	Read-only value that is available for RES 3700 POS systems and shows the number of configured workstations.
Weather Country	Select the country for weather information.
Zip Code	Enter the zip code for weather information.
Currency	Select the currency. See Enabling Currency Configuration and Setting the Common Currency for more information.
Cuisine	Enter the type of cuisine. For example, <i>Italian</i> .
Service Style	Enter the service style. For example, <i>quick service</i> .
Time Zone	Select the time zone.
Site ID	Enter an ID for this location which can be used in exports.
Address Line 1	Enter the street number.
Address Line 2	Enter the street name.
Address Line 3	Optional additional address information.
Postal Code	Enter the postal or zip code of the location, it must be 5 digits.
Municipality/City	Enter the city.
Country	Select the country.
Phone and Fax	Select your country code and enter the phone number. It must be at least 10 digits. Do not use special characters, for example a dash (-).
Cost Tier	If using cost tiers, this links to the Cost Tier module.
Financial Calendar	If the location uses a financial calendar different than the parent level or the organization, select it from the drop-down list.

Field	Description
Comp Store	Select if comparable to other stores. This field is used for customized reports when using the report builder.
Open Date	Select the date that the location originally opened.
Tax Type Override	Select a tax setting.
Enable iCare Override	Select an option for Gift and Loyalty at this location. This option is only available for 9700 POS systems.
Enable Enterprise Labor	Select to enable Labor Management. If selected, then the Configuration Model field appears.
Use Standalone Terminal	This field is not in use.
Enable Inventory	Select to enable Inventory Management if it is used at this location.
Location Tax Settings	Select the type of tax.

Establishing Relationships Between Levels and Locations

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Portal Admin**, click **Organizational Structure**, and then click **Relationships**.
2. Select the highest level in the organization, and then click **Edit**.
3. In the **Parent Name** field, select **No Parent**.
Select **No Parent** if there is only one level in the organization.
4. Click **Save**.
5. Select a location and then click **Edit**.
6. Select the parent level for the location and then click **Save**.
7. Repeat steps 5 and 6 to establish relationships for the remaining locations.

9

Item Alignment

Standardize menu items by setting up master items, master groups, and master stores.

Item alignment matches the same items under the correct master item if there is any variance in the item name. This ensures accurate reports and calculations. When your organization does not use an enterprise management module to control data entry, different locations can enter the same item with slight variances.

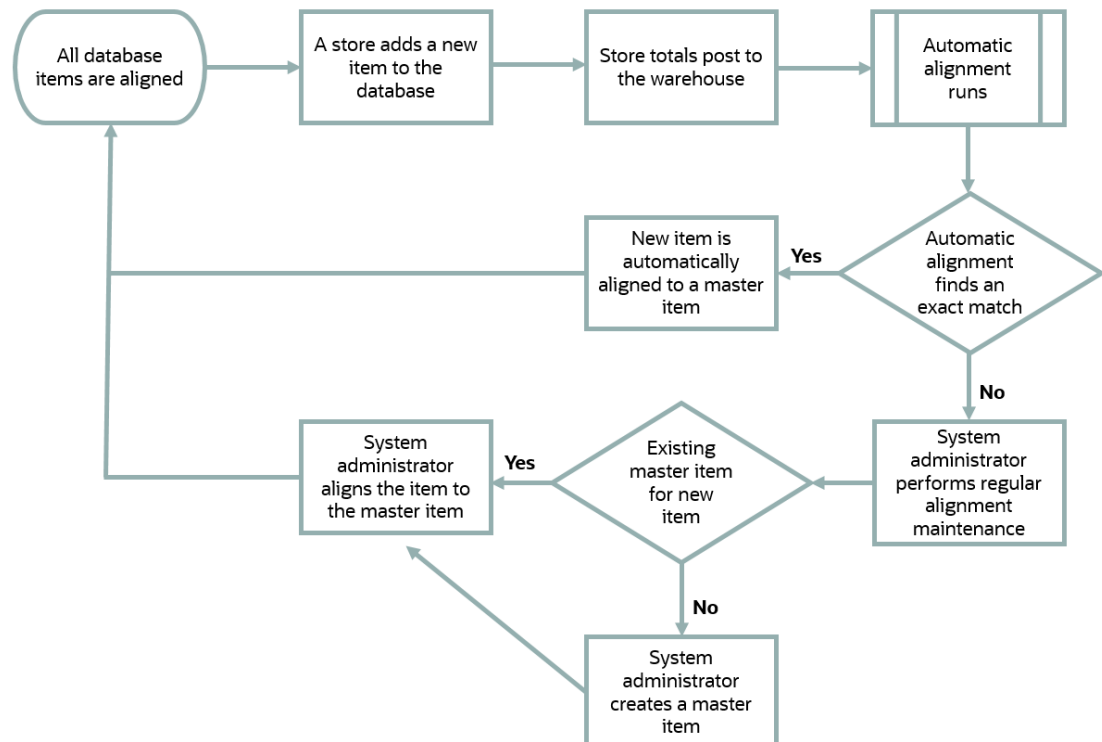
Reporting and Analytics lets you define the master entries for items, such as menu items and order types. The following diagram provides an overview of the workflow for automatically and manually aligning items added to the database.



Note:

Item alignment is not available for enterprises using Oracle MICROS Symphony Cloud Service. If duplicate items with the same name are created in Symphony at the enterprise and location/zone level, they appear on reports with their definition name followed by the POS Reference number. If you need to merge multiple master items, you must open a Service Request (SR).

Figure 9-1 Item Alignment Process



Item alignment consists of the following components:

- **Master Items:** A master item is the parent item name that unifies all name variations for an item.

For example, a restaurant chain offers a one-pound beef hamburger with cheese. Each restaurant location can name or refer to this hamburger differently, such as `cheeseburger` or `beef burger, 1LB`. By default, reports and calculations handle these two entries as completely different entities. To consolidate the two entries, you can create a master item named `Beef Cheeseburger, 1LB`, and then link the two entries to the master item. Reporting and Analytics then always treats posted entries for `cheeseburger` and `beef burger, 1LB` as a `Beef Cheeseburger, 1LB` order.

- **Master Groups:** A master group consists of similar locations, such as fast food stores, and lets an organization assign menu items and alignment rules to all locations within the group. Each location can only be assigned to one master group for each item type. Each master group must be assigned at least one master store.

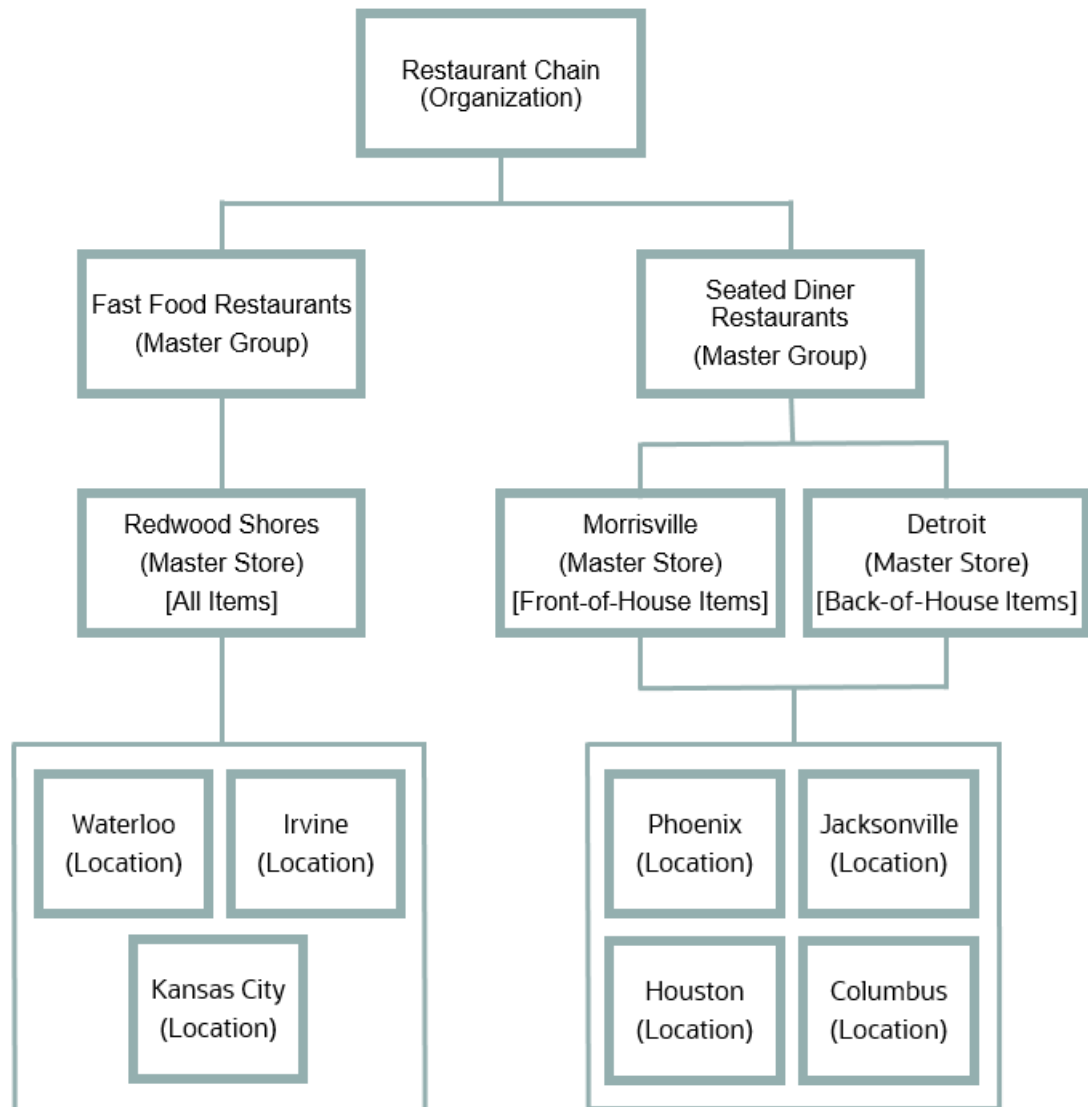
For example, a restaurant chain offers fast food stores and seated diner stores. The chain can create a master group for their fast food stores and a master group for their seated diner stores, and then assign a headquarters store to each group. This lets the restaurant control item alignment for fast food stores separately from seated diner stores.

- **Master Store:** The master store sets the default rules and alignment for all other stores within the same master group. You can only assign one master store for each item type.

For example, a restaurant chain configures a master group for their fast food chain, and assigns the `Redwood Shores` location as the master store for all front-of-house item categories, such as menu items and discounts. When a new menu item is introduced to the system in the `Redwood Shores` location, Reporting and Analytics treats the `Redwood Shores` instance as the master item. When a new menu item is introduced to the system in another location, Reporting and Analytics attempts to align the new menu item to existing master items, and you must either manually configure a master item or create an instance of the menu item at the `Redwood Shores` location.

The following diagram provides an example of an organization that defines two master groups to separate item alignment between fast food restaurants and seated diner restaurants.

Figure 9-2 Example Master Group and Master Store



This section contains the following topics:

Configuring Automatic Alignment Rules

Alignment rules define the item alignment processes by:

- Controlling how unaligned items are matched.
- Enabling standard food costs.
- Enabling item aliasing.
- Setting the start and end times for charts.
- Defining the default methods for identifying new items.
- Defining how new items are matched to existing values.

Alignment rules do not guarantee that all new items are aligned to existing items. You can use the rules to increase the likelihood of successfully automated matches. Administrators should continue to perform routine checks of unaligned items and review item alignment to ensure accuracy.

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Alignment Rules**.
2. For each item type, select an item property from the corresponding drop-down list. Reporting and Analytics searches for and aligns items with exact case-sensitive matches for the selected item property.

Table 9-1 Food and Beverage Item Alignment Rules

Item Type	Drop-down List	Item Properties
Menu Item	Menu Item Alignment Based On	<ul style="list-style-type: none"> • POS Number • Name 1 • Name 2 • Name 1 and POS Number
General Item	General Alignment Type	<ul style="list-style-type: none"> • POS Item Number Only • POS Name Only • POS Item Number and Name
Back-of-House Item	BOH Align Type	<ul style="list-style-type: none"> • POS Item Number Only • POS Name Only • POS Item Number and Name

3. Enter the start and end time for all charts in the portal using the 24-hour format.
4. Enter the default food cost percentage when a percentage is not included in the master table or the data posted from the POS.
5. Select how the system handles new menu items from the **Menu Item Name Change** drop-down list:
 - **Replace an Old Name**
 - **Create a New Menu Item**
6. Enter the **Number of Attempts** to be made to align each menu item.
7. Select how Reporting and Analytics creates or modifies tax definitions from the **Create New Tax Definition** drop-down list.
 - Select **Update Existing** to update tax definition items that exist in the system.
 - Select **On Rate Change** to update tax definitions for items that undergo a rate change.
 - Select **On Name Change** to update tax definitions for items that undergo a name change.
 - Select **On Name or Rule Change** to update tax definitions for items that undergo both a rate and name change.

8. Select **Enable Menu Item Aliasing** to allow users to designate aligned items as an alias of the master item. Automatic alignment then performs alignment if an item matches the master item or an alias.
9. Select **Enable Other Table Aliasing** to allow unaligned menu items to alias with items found in other database tables.
10. You can enter other alignment rule information in the **Other Alignment Rules** field.

Configuring a Master Group

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Master Groups**.
2. Click **Add**, or select a master group and then click **Edit**.
3. Enter a name, suffix, and comment for the master group, and then click **Save**.

Reporting and Analytics appends the suffix to items aligned with the master store. This lets you immediately identify the alignment status of items when performing manual alignment. For example, if you configure the `Front of House` master group with the `FOH` suffix, and then set a master item for `COCKTAIL`, Reporting and Analytics appends the suffix and shows the item as `COCKTAIL.FOH`.

Assigning Locations as Master Stores

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Master Groups**.
2. Select a master group, and then click **Assign Store Master**.
3. Click **Add**, and then select a **Location** from the drop-down list.
4. Select the item types or groups to designate the master items. You cannot designate an item type or group as a master item if it has been set for another master store in the same master group.
 - Select **Menu Item**, **Major Group**, and **Family Group** together.
5. You can select **Assign as location** if you deactivate the location as a master store.

Assigning Locations to the Master Group

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Master Groups**.
2. Select a master group, and then click **Assign Location**.
3. Click **Add**, and then select a **Location** from the drop-down list.
4. Select the item types or groups to align to the master items in this master group.
 - Select **Menu Item**, **Major Group**, and **Family Group** together.
5. Click **Save**.

Configuring Master Items

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Master Items**, click **Menu Item Master**, and then click the item category for which you want to configure a master item.
2. Click **Add** or select an existing master item and then click **Edit**.
3. Configure the master item:
 - a. Configure the **Name**, configure a prefix to add to items belonging to the master item in **Account Prefix**, and then select the **Master Group** from the drop-down list.
 - b. Do not change the **POS Ref #**. Reporting and Analytics generates the reference ID.
 - c. Select categories for the **Selected Hierarchy** and the **Assigned Group** levels.

Manual Item Alignment

To perform manual item alignment in Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Alignment**, and then click the type of database item. If the organization is configured to match family group or major group, you must perform alignment in the order of family group, major group, and then menu items.

I want to	Then do
Filter the list of master items. Align an item.	Click Options . <ol style="list-style-type: none"> 1. Click the master item from the Master Items list. 2. Click the unaligned item from the Unaligned Items tab, and then click Align.
Change the alignment of an item.	<ol style="list-style-type: none"> 1. Click the master item from the Master Items list. 2. Click the item from the Aligned Items tab, and then click Transfer. 3. In the Select destination master item window, click the destination master item, and then click OK.
Designate an aligned item as an alias.	If the alignment rule allows menu item aliasing: <ol style="list-style-type: none"> 1. Click the master item from the Master Items list. 2. Click the item from the Aligned Items tab, and then click Alias.

I want to	Then do
Unalign an item.	<ol style="list-style-type: none"> 1. Click the master item from the Master Items list. 2. Click the item from the Aligned Items tab and then click Unalign.
Merge master items.	<ol style="list-style-type: none"> 1. Click the master items from the Master Items list and then click Merge. 2. In the Select master item dialog box, click the master item you want to keep, and then click OK.
Designate an unaligned item as a master item.	<ol style="list-style-type: none"> 1. Click an item from the Unaligned Items tab and then click Create Master. 2. Fill out the Create Master form and then click OK.
Configure alignment rules.	<ol style="list-style-type: none"> 1. Click Modify Rules. 2. Fill out the form and then click Create.
Run the alignment process immediately.	Click Run Alignment .

Configure Tender Media Master Items for Daily Operations Report

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, and then click **Warehouse Admin**.
2. Click **Master Items** and then click **Tender Media Master**.
3. Select the tender and then click **Edit**. For each of the following tenders, configure the corresponding type and subtype:
 - Tenders that represent cash payments
 - **Type**: select **Payment**.
 - **Subtype**: select **Cash**.
 - Tender media that represent tips paid
 - **Type**: select **Pickup**.
 - **Subtype**: select **Tips Paid**.
 - Tender media that represent deposits
 - **Type**: select **Pickup**.
 - **Subtype**: select **Deposit**.
4. Click **Save**.

10

Financial Calendars and Day Parts

Set up day parts and define the financial calendar.

Reporting and Analytics uses the following time intervals for reporting and calculating data:

- Calendar: you can perform calculations based on standard calendar intervals, such as years, months, and weeks.
- Financial Calendar: you can configure financial calendars and financial years to perform configurations on fiscal intervals, such as fiscal years and fiscal quarters.
- Day Parts: you can divide workdays into day parts to perform calculations on different time intervals, such as breakfast periods, lunch periods, and dinner periods.

Financial Calendars

The sales information received by Reporting and Analytics from the POS application is processed each business day, as configured by the end-of-day (or end-of-night) operations.

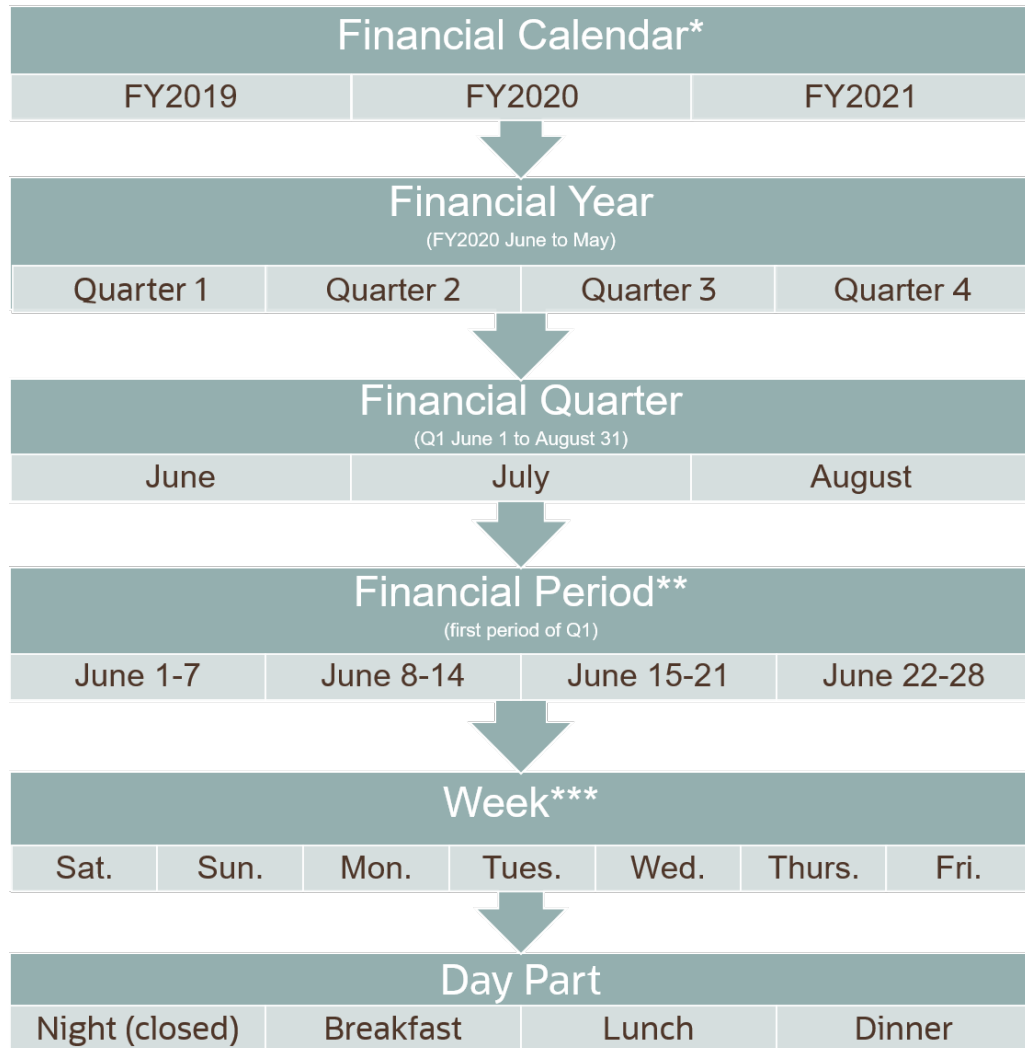
For example, if a location is configured to perform end-of-day operations every night even when it is closed on weekends, the application creates Saturday and Sunday as business days with no sales values, resulting in a seven-day week. If a store is configured to perform end-of-day operations every week day, the application only creates Monday to Friday, and the empty sales values from Saturday and Sunday are rolled into Monday, resulting in a five-day week.

The Reporting and Analytics financial calendar organizes the business dates within the following defined fiscal year components:

- The start and end of the fiscal year. Financial calendars also define how to handle the surplus day(s) at the end of the year.
- The start and end of each financial quarter.
- The start and end of each financial period.
- The accounting cycle of weeks in each financial period.
- The starting day of each week.

Defining fiscal year components, rather than using calendar months, ensures consistent calculations and comparisons across multiple months. Calendar months have inconsistent numbers of weeks and days, making comparison across multiple months less meaningful. A defined financial period consists of four or five weeks, depending on the accounting cycle, and each period includes the same number of each day of the week. This results in a meaningful comparison of values across periods.

The following illustration shows the components of a financial calendar:



* The financial calendar can be assigned to an organization level and location, with the location settings overriding the level settings.

** The length of a financial period depends on the accounting cycle selected for the financial year. Financial periods are defined by the number of weeks since the start of the financial quarter, and do not correlate to any one specific calendar month.

***The first business day of the financial year determines the starting day of the financial week. For example, if a financial year begins Saturday, June 1, every financial week begins on Saturday and ends on the following Friday.

Accounting Cycles

The number of weeks in each financial period is determined by the accounting cycle. In Reporting and Analytics, accounting cycle options include:

- 4/4/5
- 5/4/4
- 4/5/4

- 4/4/4

The 4/4/5 accounting cycle consists of a four-week financial period, another four-week financial period, and a five-week financial period. Each financial quarter consists of these 3 periods, for a total of 12 financial periods for the entire fiscal year.

The 4/4/4 accounting cycle consists of only four-week financial periods. This requires an additional financial period to complete the fiscal year, for a total of 13 fiscal periods.

Last Week of the Financial Year

Depending on the number of days in a financial week generated by your POS end-of-day operations, the last week of the year can consist of more than seven days. You can configure Reporting and Analytics to handle the extra days in one of two ways:

- **Add extra days to the last week:** By default, Reporting and Analytics creates an extended week with more than seven days.
- **Create a new financial week with the extra days:** You can select this option to create an additional week containing the additional days.

Creating a Financial Calendar

1. Create the Financial Calendar for your organization or location:
 - a. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Financial Calendars**.
 - b. Click **Add**, enter a **Name** for the calendar, and then click **Save**.
2. Add a financial year to the calendar:
 - a. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Financial Periods**.
 - b. Select the financial calendar and click **Configure**.
 - c. Click **Add Year Automatically** to use the creation wizard, or click **Add Year Manually** to manually enter all financial year.

3. Set the **Financial Calendar** field for locations and levels in the organization.

Locations inherit the financial calendar setting for the level to which they belong. You can set an overriding financial calendar directly for the location.

Creating a Financial Year with the Automated Wizard

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Financial Periods**.
2. Select the calendar for which you want to define the financial periods and then click **Configure**.
3. Click **Add Year Automatically** and then fill out the form as described in the following table:

Field	Description
Year Name	Enter a name for the financial year.

Field	Description
Year Number	Enter an order in the list. The financial calendar lists the financial years in an order based on this field.
Year Start Date	Enter or select the first day for the year.
Year End Date	Enter or select the last day for the year.
Accounting Cycle	Select the accounting cycle for the year: <ul style="list-style-type: none"> • 4/4/5 • 5/4/4 • 4/5/4 • 4/4/4

- If there are more than seven days in the last week of the year, you can select **Add extra days to the last week** to combine the extra days into the week, or you can select **Create a new financial week with the extra days** to create a new reporting week.

If you do not select either option, the system implements **Add extra days to the last week**.

Creating a Financial Year Manually

- In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Financial Periods**.
- Select the calendar for which you want to define the financial periods and then click **Configure**.
- Click **Add Year Manually**, and then enter a **Name** and **Number** for the year.
- Click **Add New Period** to add a new row to the table of periods, then enter a name for the period, the ordering number for the period, and the fiscal quarter to which the period belongs.

Day Parts

Day parts separate the business day into smaller periods of time. They are used for reporting, comparison, and filtering business-critical metrics throughout the business day or between business days.

Day parts are configured for the enterprise and cannot be different by location or revenue center.

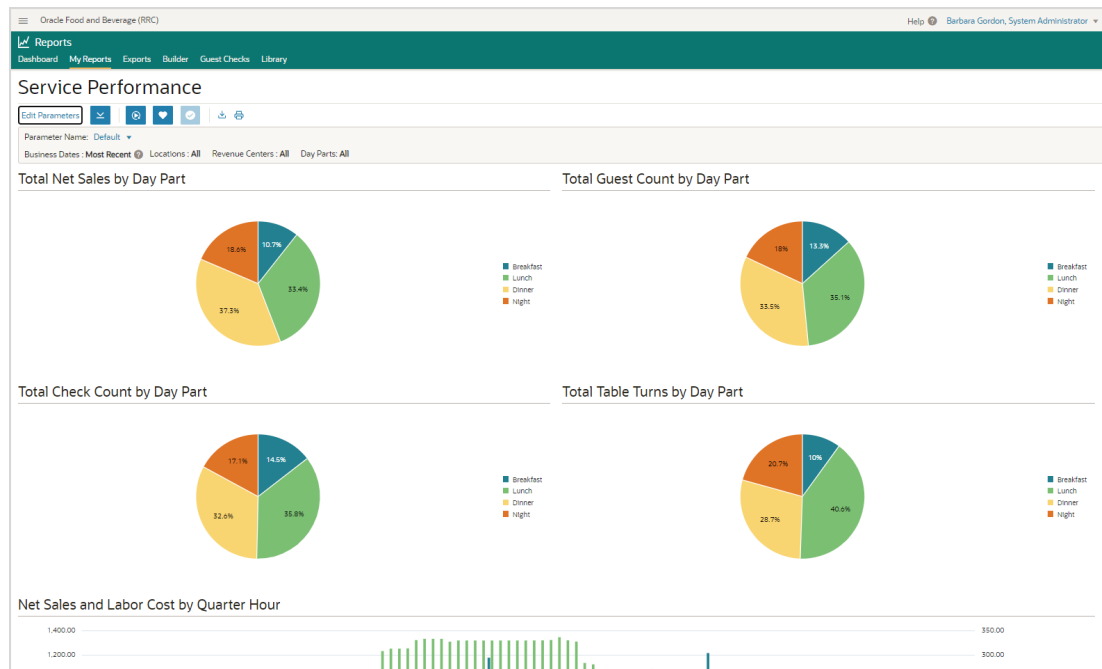
A typical example configuration includes Breakfast, Lunch, Dinner, and Night.

If the enterprise does not want or need to use day parts for reporting purposes, they still need an “All Day” day part which covers all 24 hours of the day.

! Important:

Day parts are a required configuration for every enterprise. Without day parts configured, some reports may not function properly and display `No data is available for the defined parameters.`

The following figure shows a Service Performance report that consists of sales and operational metrics in pie chart format. The pie charts are comprised of slices that correspond to day parts.



Creating Day Parts

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Day Part**.
2. Click **Add** and fill out the form as described in the following table:

Field	Description
Name	Enter a name for the day part. This is the name as it will appear on reports and in the day part filter.
Beginning Fixed Period	Select the start time for the day part.
Ending Fixed Period	Enter the end time for the day part, making sure the time does not overlap with the start time.
Report Display Order	Enter the order in which reports list the day part. Different day parts should have different numbers assigned.
Apply To	Select or deselect the days of week for which this day part applies. You can click Clear Days to deselect all days.

3. Verify that the day part does not overlap other day parts.
4. Verify that the day parts cover all hours of a business week, otherwise reports may not balance since sales during times not covered in any day part are not included.

If there are untouched hours, the Day Part page shows the following message:

Warning: The day parts you've setup do not cover all fixed periods and days of the week. Please review documentation for additional details.

Example Configurations

Example: Typical Configuration

 **Note:**

The Night day part extends past midnight. To accomplish that, configure two day parts with the same name and the same sort order. On reports they look like a single day part.

Day Part	Beginning Fixed Period	Ending Fixed Period	Report Display Order	Apply To
Breakfast	5:00AM	9:59AM	1	All days
Lunch	10:00AM	2:59PM	2	All days
Dinner	3:00PM	8:59PM	3	All days
Night	9:00PM	11:59PM	4	All days
Night	12:00AM	4:59AM	4	All days

The following image shows the configuration for the Breakfast day part:

Oracle Food and Beverage (RRC) configuration for the Breakfast day part. The configuration includes:

- Name: Breakfast
- Beginning Fixed Period: 5:00 AM
- Ending Fixed Period: 9:59 AM
- Report Display Order (1-100): 1
- Apply To: All days (Sun, Mon, Tue, Wed, Thu, Fri, Sat)

The following image shows the configuration for the Night day part that extends past midnight:

Day Part	Display Order	Sun	Mon	Tue	Wed	Thurs	Fri	Sat
Breakfast	1	✓	✓	✓	✓	✓	✓	✓
Lunch	2	✓	✓	✓	✓	✓	✓	✓
Dinner	3	✓	✓	✓	✓	✓	✓	✓
Night	4	✓	✓	✓	✓	✓	✓	✓
Night	4	✓	✓	✓	✓	✓	✓	✓

Example: Configuration Where Day Parts are not Used for Reporting

If your enterprise does not use day part reporting, you still need to create a day part that spans all 24 hours of the day. The following table shows an example configuration:

Name	Beginning Fixed Period	Ending Fixed Period	Report Display Order	Apply To
All Day	12:00AM	11:59PM	1	All days

Troubleshooting

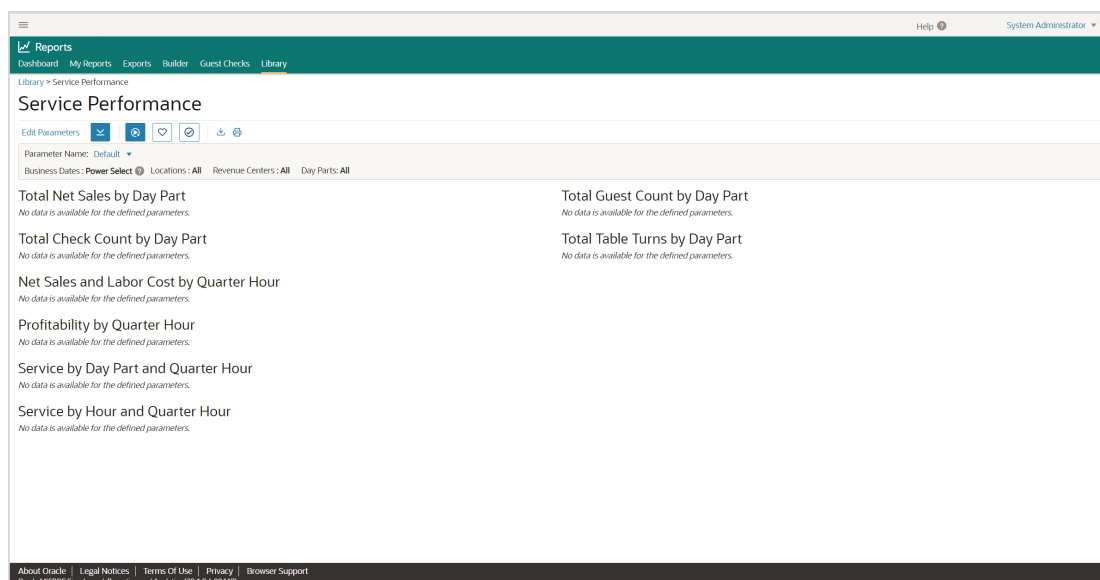
This topic describes report issues that could be caused by incorrect day part configurations and provides corrective actions.

Reports display No data is available for the defined parameters

Make sure to filter the report for business dates on which you know the location was open and actively trading. If data is still not returned, this may be caused by no day parts configured for the enterprise.

Solution: Configure at least one All Day day part from 12:00AM to 11:59PM and verify the reports again.

The following image shows how the Service Performance report is displayed if no day parts are configured:

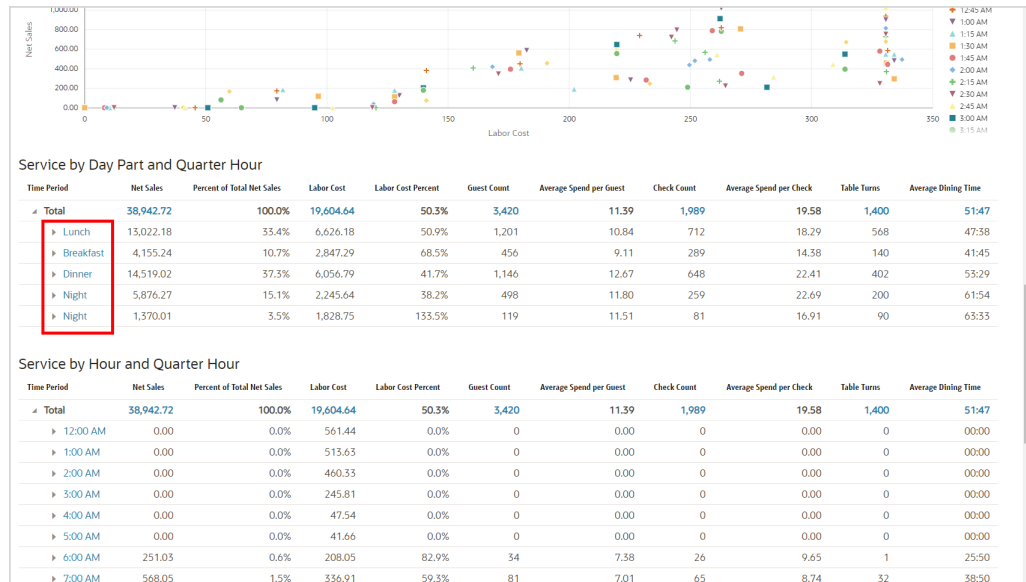


Reports do not show the day parts in the right order

When running a report, the day parts are listed out of chronological order; for example, Breakfast shows between Dinner and Lunch.

Solution: Review the sort order of the day parts. Make sure you assign a different number to each day part (except for day parts overlapping midnight) and assign them in the chronological order you want them to appear on reports.

The following image shows day parts in the wrong order on a report:



Reports only show one day part with all sales for the day

When running a report, only one of multiple configured day parts are displayed, and the sales totals are more than you expect for the single day part.

Solution: This issue is caused by assigning the same sort order to all day parts. Only one day part is displayed. Make sure to assign different sort order numbers to each day part (except the day part that extends past midnight).

Day part configuration page displays warning: The day parts you've setup do not cover all fixed periods and days of the week. Please review documentation for additional details.

This is caused by an incomplete setup and can result in reports not balancing if sales are made during the days or hours that are not covered.

Solution: Review each day part configuration to make sure that:

- All days of the week are covered with a day part.
- The configuration did not miss a quarter hour or more. Each day part should start at the same time the previous day part ended.

After you correct the configuration, the warning message disappears.

The following image shows a configuration page with the warning message. In this case, the issue is caused by Saturdays not being covered by the Breakfast day part.

Oracle Food and Beverage (RRC) Help Barbara Gordon, System Administrator

[Add](#) | [Edit](#) | [Delete](#) | [Back](#) | [Help](#)

[Day Part](#)
Oracle Food and Beverage

Search by Name

Day Part	Display Order	Sun	Mon	Tue	Wed	Thurs	Fri	Sat
Breakfast	1	✓	✓	✓	✓	✓	✓	✓
Lunch	2	✓	✓	✓	✓	✓	✓	✓
Dinner	3	✓	✓	✓	✓	✓	✓	✓
Night	4	✓	✓	✓	✓	✓	✓	✓
Night	4	✓	✓	✓	✓	✓	✓	✓

Warning: The day parts youve setup do not cover all fixed periods and days of the week. Please review documentation for additional details.

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11

Currency and Exchange Rate

Set the type of currency and exchange rate.

You can enter as many types of currency as needed by the organization to control and analyze financial data. If your organization uses multiple currencies, you need to create exchange rates.

Follow the steps in the order they appear below:

Enabling Currency Configuration

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Enterprise Options**.
2. Select **Enable Common Currency**.
3. Click **Save**.

Adding a Currency Type

1. Make sure you enabled common currency.
2. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Currency**.
3. Click **Add**.
4. Fill out the form as described in the following table:

Field	Description
Currency Name	Enter the name of the currency type. For example, <code>American Dollar</code> .
Abbreviation	Optionally, enter an abbreviation for the currency. For example, <code>USD</code> .
Multiply	Select to multiply the currency against the base currency.
Round To	Enter the number of decimal places for rounding in the 0.0 format. For example, <code>0.00</code> to round to two decimal places and <code>0.0</code> to round to one decimal place.

5. Click **Save**.

Setting the Common Currency

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Enterprise Options**.
2. Select the currency type from the **Common Currency** drop-down list.
This is the currency to which other currencies are exchanged and converted.
3. Click **Save**.

Setting a Location's Currency

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Portal Admin**, click **Organizational Structure**, and then click **Locations**.
2. Select the location and then click **Edit**.
3. In the **Currency** field, select the currency for this location.
4. Click **Save**.

Adding and Updating Exchange Rates

1. Make sure you enabled common currency.
2. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Warehouse Admin**, click **Miscellaneous**, and then click **Exchange Rate**.
3. Search for or select a currency and click **Configure**.
4. On the Exchange Rate Administration page, click **Add**, or select an existing exchange rate and then click **Edit**.
5. Fill out the form as described in the following table:

Field	Description
Business Date	Enter or select the date on which this exchange rate goes into effect.
Business Date	Optionally, enter or select the date on which this exchange rate stops being used for calculations.
Exchange Rate	Enter the multiplier relative to the base currency.

6. Click **Save**.

12

Data Privacy

De-identify users and download personal data reports.

Reporting and Analytics stores personally identifiable information such as names, email addresses, and sign-in date and time stamps. Reporting and Analytics provides tools that let you quickly address user privacy requests. For example, you can de-identity users. When you de-identify a user, the system overwrites their information with generic or empty values so activity cannot be traced back to the user.

De-identifying Users

When you de-identify a user, Reporting and Analytics replaces the user's personal information with generic or empty values.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **System**.
2. Click **Data Privacy**.
3. Search for the user and then select the user record in the results list.
4. Click **De-identify**, review the confirmation details on the **De-identify** page, and then click **De-identify and Close**.

Viewing Logs and Reports

Reporting and Analytics lets data collectors download personal data reports for data subjects.

1. In Reporting and Analytics, click the side navigation menu, click **Administration**, and then click **System**.
2. To view a list of data privacy actions performed for a data subject or unique identifier, click **Data Privacy Log**.

On the **Data Privacy Log** page, enter criteria (for example, the data subject name and the action performed) and then click **Search**.

3. To download a personal data report, enter search criteria and then click **Download Personal Data Report**.

You can download the report as a Comma Separated Value (CSV) file, JSON file, or XML file.

4. To download a list of de-identification activity, click **Download De-Identification Log (Last 31 Days)**.

13

Scheduled Reports

You can use Report Mail to schedule reports to run at a specified date and time, and to distribute the report by email to a user or role.

For example, you can configure Report Mail to generate and send a report every morning that summarizes operations from the previous business day. This lets you access reports on a regular basis without logging into Reporting and Analytics or manually running the report.



Note:

Chart visualizations are not included in Report Mail.

Scheduling Reports for Email Distribution

Set up report mail and define how often the emails are sent.

1. In Reporting and Analytics, click the side navigation menu, click **Configuration**, click **Report Mail**, and then click **Report Mail**.
2. Click **Add**.
3. Within the **Content** tab, specify email content as described in the following table:

Setting	Description
Type	Select the report type.
Report Selection	Select the report. If the list of reports is long, specify search criteria to locate the report.
Preferences	<ul style="list-style-type: none">• Specify delivery preferences. The report you select determines the preferences that appear.• If you select multiple locations, one report is sent for each location.• Select Consolidated to send one email with aggregate report data for all locations.• By default, each report is sent in a separate email. If you want one email with all report files, then select Zip multiple files.• Select the Output Type and Date Selection.• Depending on the report you select, there may be additional selection options.

- Click the **Name** tab and then specify email settings as described in the following table:

Field	Description
Name	Enter the name of the report email that identifies it in Reporting and Analytics.
Description	Enter a description of the report email that identifies it in Reporting and Analytics.
Subject	Enter the email subject line.
Active	Select to send the email. Deselect to stop report email, but save the settings.
Email When Error	Select to notify the system administrator of report email errors.

- Click the **Recipients** tab and then select the email recipients.
If you want to send the email to more than one user, select the first user, select **Additional recipient(s) emails**, and then enter the email addresses.
- Click the **Frequency** tab and then specify how often report emails are sent as described in the following table:

Field	Description
Precondition	Select the End of Day option if you want the system to verify that the end of day has been completed before sending the report mail.
Frequency Type	Select how often the report mail will be emailed.
Time Zone	Select the time zone.

Depending on your system configuration, Reporting and Analytics can run scheduled reports and send report emails after a service outage. Reports scheduled to run more than once during the interval only run once with the last set of information. If the business date changed during the service outage, all reports are run as if they were scheduled to run on the current day. For example, the Daily Operations report will show information for the most recent business date rather than retrieving information for the day that the service outage occurred.

- Click **Save**.

Export Data from Reporting and Analytics

Set up the data export process and run exports to an endpoint to manage data.

Export configurations let you export data from the Reporting and Analytics database to a file and then deliver the file to an endpoint through SFTP or through posting to a URL over an HTTPS connection. The export configuration contains code for querying the database and defines the format of the exported data. You associate an export schedule with the configuration to specify the enterprise locations from which data is exported, export frequency, and how the data file is delivered to the endpoint.

The **Exports** tab houses the export summary page, which shows status across all export configurations for your enterprise. You can drill down to view more details by clicking on the numbers associated with each status.

Within the **Export Metrics** page you can:

- Filter status by selecting an execution time frame for a specific configuration.
- View export configurations by location by clicking on a status. For example, click **Failed** to view all configurations by location that failed.
- Search export results by export configuration and schedule or you can search for results of on-demand exports.

Other actions related to exporting data can be found in side menu of the **Exports** tab.

Adding an Export Configuration

Add subject areas to the configuration, add code that queries the database, specify the format of the exported data.

Required system privileges: **Export Configurations, Add/Edit/View/Delete Export Configurations**

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Exports**, click **Configurations**, and then click **Add Export Configuration**.

2. Enter a configuration name and then click a creation method.

To add a brand-new configuration, click **New**.

To copy an existing configuration and then modify it, click **Copy**, and then select the source configuration.

To copy a core export configuration and then modify it, click **Core Exports**, and then select a template.

When you copy a configuration or use a core export configuration as a template, you can preview the subject areas and steps (the code for querying the subject areas in the database) for the source and you can also preview the final result.

3. Click **Add**.
4. Define the subject areas for your configuration.

For a brand-new configuration, to add a subject area, click **Add** in the Subject Areas section. Select the category, subject area, and version. To work with actual data from your Reporting and Analytics database, click the **Actual** data type. If you do not have permissions to work with actual data, only the **Sample** data type is available.

If you copied an existing configuration or used a core export configuration template, you can click a subject area menu to edit or remove the subject area.

5. Define the steps for your configuration.

A step contains the Apache Drill SQL code for selecting subject area data in the Reporting and Analytics database.

For a brand-new configuration, Reporting and Analytics automatically adds the first step. Enter the code in the code text area. Keep the following points in mind when entering code:

- The subject area being queried needs opening and closing parentheses after the alias name. The alias name is shown on the left side of the screen after the subject area has been added and expanded. The value after **Table:** is the alias.
- In the SELECT statement, it is a best practice to specifically select each required column. Avoid using the following in a drill step: `SELECT * FROM <subject area alias>`. Otherwise integrations may break when new columns are added to an existing subject area.

The following example shows code for selecting JSON fields from a subject area:

```
SELECT
  'DSC' as `Record Type`,
  COALESCE(DD.revenueCenterNum, 0) AS `Revenue Center Number`,
  COALESCE(DD.discountNum, 0) AS `Discount Number`,
  COALESCE(DD.discountName, ' ') AS `Discount Name`,
  COALESCE(DD.discountTotal, 0) AS `Total`,
  COALESCE(DD.discountCount, 0) AS `Count`,
  COALESCE(DD.discountMasterName, ' ') AS `Discount Master Name`,
  COALESCE(DD.discountMasterNum, 0) AS `Discount Master Number`,
  COALESCE(DD.revenueCenterName, ' ') AS `Revenue Center Name`,
  COALESCE(DD.revenueCenterMasterName, ' ') AS `Revenue Center
Master Name`,
  COALESCE(DD.revenueCenterMasterNum, 0) AS `Revenue Center Master
Number`,
  COALESCE(DD.discountGrossVat, 0) AS `Discount Gross VAT`
FROM discountDailyTotals3() DD
```

 **Note:**

The alias for a step cannot be changed and can be referenced in other steps. For example, to reference Step 1, use the alias `step1`.

To add a step, click **Add Step**, enter a step name, and then add the query code.

To test the query, click **Test All Steps** or **Test Step**. If one step references another step, then click **Test All Steps**.

To exclude a step when testing the query, deselect the **Enabled** box to make it inactive. Select **Enabled** again to include the step in the final output.

To exclude step query results from the output, deselect the **Include in export** box to make it inactive.

To add custom JavaScript code to format the output, click **Add JavaScript Step**, and then enter the JavaScript code in the code text area.

6. Save your changes and then click **Results** to specify the format of the exported data.

To export to a JSON file without formatting, click **JSON**.

To export to a file with fields separated by a delimiter, click **Delimited** and then enter the delimiter in the **Delimiter Value** field. Optionally, specify a single-character text qualifier that encloses each value. To include headers in the output, select **Include headers**.

To export to a tab-delimited file, click **Tab Delimited**. Optionally, specify a single-character text qualifier that encloses each value. To include headers in the output, select **Include headers**.

To export to an XML file, click **XML**. Click the **Mapping** drop-down and select the XML structure for the output file:

- **Xml Node Mapping**: Makes the output of each step a parent node. The row alias name of the step output is the name of the child node as defined in final output JSON.
- **Xml Node Attribute Mapping**: Makes the output of each step a parent node and records child nodes. The row alias name of the step output is the name of the child node as defined in final output JSON.
- **Xml Table Mapping**: Makes the output of each step a table.

To include headers in the output XML, select **Include Headers** and enter the headers in the code text area.

7. To preview the results, click **Run and See Results**.
8. Save your changes and then add an export schedule.

The export schedule defines when the system runs the export and how the system delivers the exported data file to the end point.

Adding a Location Group

Specify a group of locations for which an export configuration exports data. Create a location group before adding an export schedule.

Required system privileges: **Location Groups**, **Add/Edit/View/Delete Location Groups**, and either **View Schedules** or **Add/Edit/View/Delete Schedules**.

Additional system privilege to transfer ownership of the location group: **Transfer Ownership of Location Groups**.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Exports**, click **Schedules**, and then click **Manage Location Groups**.
2. On the Manage Location Groups page, click **Add Location Group**.
3. Enter a name for the location group.

4. Select the level or location that you want to add to the group.
5. Click **Add**.

Adding a Delivery Profile

Specify delivery through SFTP or HTTPS, define destination settings such as the server location for SFTP or the URL for HTTPS, specify authentication details. A delivery profile must be added before adding an export schedule.

Required system privileges: **Export Schedules**, **Add/Edit/View/Delete Delivery Profiles**, and either **View Schedules** or **Add/Edit/View/Delete Schedules**.

Additional system privilege to transfer ownership of the delivery profile: **Transfer Ownership of Delivery Profiles**.

You need to select a delivery profile when you add an export schedule. Add the delivery profile before adding the export schedule.

The owner of the delivery profile needs to have all data permissions assigned to access and export data from all subject areas used within the export configuration.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Exports**, click **Schedules**, and then click **Manage Delivery Profiles**.
2. On the Manage Delivery Profiles page, click **Add Delivery Profile**.
3. Enter a profile name and specify if the profile is public or private.

Only the owner of a private delivery profile can add it to a schedule or change the assignment in a schedule.

4. Select the delivery type.

For delivery through SFTP, specify the destination server, port number (if different than 22), and folder path on the server. If you authenticate with a certificate, paste the certificate in the **SSH Private Key** text box. If you edit the profile at a later time, the key value does not show in the text box, only text that mentions a key exists shows in the text box. To change the private key, paste the new private key in the text box and then click **Save**. If you authenticate with credentials, specify the user name and password.

Note:

- You can only use private keys in an OpenSSH format when authenticating with a certificate.
- If you are using your own sFTP server, ensure it supports up-to-date SSH cipher suites. See [20.1.14 Features and Updates](#) for the complete list of supported cipher suites.

For delivery through HTTPS by posting to a URL, specify the URL of the receiving web service and then specify optional header parameters. Include header attributes in the post using token. Header parameters should be formatted as <key>: <value>. Separate multiple parameters by a line break between each

header parameter. The export file name will be posted to the web service as a header parameter: filename: <file name as specified in the export schedule>.

Example: A basic authorization to the external web service could be specified as:
Authorization: Basic <authorization key>.

Manage Delivery Profiles ?
×

Add Delivery Profile

* Required field

Delivery Profile Name *

Profile

Public

Private

Type

SFTP

HTTPS

API POST URL *

Header Parameters *

Authorization: Basic YWR ZXQ=

Cancel

Add

Adding an Export Schedule

Specify the enterprise locations for which an export configuration exports data, set the export frequency and recurrence, specify how the system delivers the exported data file.

Required system privileges: **Export Schedules** and **Add/Edit/View/Delete Schedules**.

When you add an export schedule, you select a delivery profile and you can select a location group. Add the delivery profile and location group before adding the export schedule.

If a new export schedule fails to execute or deliver for three consecutive executions, for the complete location scope, it will be deactivated and the owner of the schedule receives a notification email. Previously working schedules that start failing will be deactivated after seven consecutive failures and the owner notified.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Exports**, click **Schedules**, and then click **Add Export Schedule**.
2. Specify a name for the schedule, select an export configuration, and then click **Add**.
3. If you do not need to immediately run the export configuration with the schedule you are creating, leave the default status as **Inactive**. See Step 11 for instructions to validate and activate the export schedule.

4. In the **Location Scope** section, select the locations for which data is exported.
To export data for a group of locations, you need to create the location group first before you can select it from the **Location Group** drop-down.
To include inactive locations in an export, select **Include inactive locations in level / location group' option**.
5. In the **Frequency** section, set the export first run date, run time, time zone, and recurrence type.

Important:

Review each location's time zone and schedule time zone. Schedule the export for at least 2 hours after the last location's start of day (SOD) time.

6. Select the recurrence options that appear based on your recurrence type selection.
7. In the **Conditions** section, select the condition that starts the export and how frequently the system checks to determine if the condition is met.
8. Specify additional export conditions.

For example, you can set an end of day condition to not export data until all Symphony transactions have posted after the business day is over.

9. In the **Export Delivery Options** section, specify basic properties for the data export file such as the name of the file.

In the **Export File Name** field, enter the name of the export file with the file extension. You can use a combination of text and tokens. The following sample file name includes text and tokens for location reference and business date:

```
My_Export_${locationName}_${businessDate}.csv
```

The system supports the following tokens:

- `${organizationId}`
- `${organizationName}` - If any of the following reserved characters are used in location names, they will be replaced with a dash (-) character: /, \, |, ?, *, <, >, :, " (double quote)
- `${locationId}`
- `${locationRef}`
- `${businessDate}`
- `${country}`
- `${region}`
- `${locationName}`
- `${month}`
- `${week}`
- `${counter-10000}` - Resets at 10000
- `${dateCounter}` - Increments for the same day and resets at change of business date

- `${dayCounter}` - Increments each day and resets when reaches 1000
- `${startDate}` & `${endDate}`
- `${startTime}` & `${endTime}`
- `${siteID}`
- `${financialWeekNum}`
- `${fixedPeriod}`
- `${financialPeriodNum}`
- `${timeZone}`

The `${businessDate}`, `${startDate}`, `${endDate}`, `${startTime}`, and `${endTime}` tokens support the following date and time sub-tokens:

- `YYYY`: four-digit year
- `YY`: two-digit year
- `MM`: two-digit month (examples: 01 for January, 02 for February)
- `MMM`: three-character description of the month (examples: JAN, FEB, MAR)
- `DD`: two-digit day of month (01 through 31)
- `hh`: two digits of hour (00 through 23; do not use am and pm values)
- `mm`: two digits of minute (00 through 59)
- `ss`: two digits of second (00 through 59)

The following examples show valid token and sub-token combinations:

- `${businessDate(YYYY-MMM-DD)}`
- `${startDate(YYYY-MMM-DD)}`
- `${endDate(YYYY-MMM-DD)}`
- `${startTime(YYYY-MM-DDThh:mm:ss)}`
- `${endTime(YYYY-MMM-DDThh:mm:ss)}`

To create a ZIP version of the export file, select **Compress Export**.

To encrypt the data, select **Encrypt using PGP Encryption** and then paste an encryption key in the text box. Consider the following details when encrypting the data:

- Make sure the PGP public key is an RSA encrypt key with minimum key size of 2048 (see RFC 4880 for information).
- The data is encrypted using first public-key available in PGP key ring.
- The encrypted output is an ASCII Armored Message (zip compressed).
- You can decrypt the data using the PGP private key associated with PGP public key.

10. Select the delivery profile.

The delivery profile defines the settings for delivering the exported data file to the end point. The delivery profile owner must have the data permissions for the subject areas that are used in the configuration.

11. Validate and activate the export schedule. You can change the status to **Active** when you run the export configuration. An inactive schedule does not generate an export. To activate the schedule:
 - a. Click **Save and Validate** to view the validation step.
 - b. Select the export scope **Location Name** and **Date** for which to validate export generation. To validate against sample data, select **Use sample data to validate configuration**.
 - c. Click **Validate**. The validation steps are displayed on the screen. If validation completes successfully, the schedule is saved and activated. If validation fails, the detailed failure message is displayed to help resolve the problem. In this case, try validation again.

On-Demand Exports

Run an export schedule on-demand outside of its scheduled run time.

Required system privileges: **Run Now Export Schedule** and either **View Schedules** or **Add/Edit/View/Delete Schedules**.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Exports**, and then click **Schedules**.
2. In the Export Schedules list, find the export schedule and export configuration pairing and then click **Run Now**.
3. If necessary, make changes to location and date settings on the schedule Run Now tab and then click **Run Now**.

You can run the export for a single business date or a range of business dates. For an export that is greater than a day, it's the end business date of that range that is input.

Searching for Exports

Search for on-demand exports or configurations run with schedules.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, and then click **Exports**.
2. To search for on-demand exports, click **On Demand** and then enter search criteria.
3. To search for configurations run with a schedule, click **Search** and then enter search criteria.

Changing the Export Configuration Owner

Required system privilege: **Transfer Configuration**.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Exports**, click **Configurations**, and then click the configuration in the list.
2. Click **Owner**.
3. Select the new owner from the **New Owner** drop-down list and then click **Save**.
The new owner must have the **Transfer Configuration**, **Export Configurations**, and **Add/Edit/View/Delete Export Configurations** system privileges.

Deleting Export Configurations

You must be the owner of the export configuration to delete it and the configuration cannot be active.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Exports**, click **Configurations**, and then click the configuration in the list.
2. Click **Delete** and then click **Delete**.

Tutorial: Export Sales Operations Data

Explains step-by-step how to export menu item sales data for the Sales Operations data category.

This tutorial shows how to export sales operations data from the Reporting and Analytics database. The following table lists the decisions we need to make to complete the tutorial.

Decisions to Consider	This Tutorial
What type of sales operations data do I want to export?	Menu item sales
Which database table contains the data I want to export?	menuItemSales
Which table columns do I want to export?	<ul style="list-style-type: none"> • Location name • Business date • Major group master name • Sales total rounded to 2 decimal places • Sum of discount totals
How do I want to format the exported data?	Define the format of the data with custom JavaScript.

1. In Reporting and Analytics, click the side navigation menu, click **Reports**, click **Exports**, click **Configurations**, and then click **Add Export Configuration**.
2. In the **Export Configuration Name** field, type `Menu Item Sales Tutorial`.
3. Since we are creating a new configuration, click **New**, and then click **Add**
4. Add the **Menu Item Sales** subject area to the configuration:
 - a. In the Subject Areas section on the Details tab, click **Add**.

- b. Select **Menu Item Sales** from the **Subject Area** drop-down list.

The **Version** drop-down list defaults to 1.0. You do not need to change this value.

- c. For **Data Type**, click **Sample data** and then click **Add**.

Reporting and Analytics shows the menuItemSales database table columns with sample data. Since our configuration has only one subject area, Reporting and Analytics appends the table name with the number 1 (menuItemSales1). If we added another subject area, Reporting and Analytics would append the table name with the number 2.

5. In the **Drill Step 1** text box, add the following SQL code to query the database table and return the data we want.

 **Note:**

The following code contains line numbers. Do not include the line numbers in your SQL code. The numbers are for illustrative purposes only to describe the code in the table that follows the code.

```

1 SELECT
2  mi.locationName as locationName,
3  mi.businessdate as businessDate,
4  mi.majorGroupMasterName as MGName,
5  round(sum(mi.salesTotal), 2) as netSales,
6  sum(mi.discountTotal) as discountTotal
7 FROM
8  menuItemSales1() as mi
9 GROUP BY
10 mi.locationName, mi.businessDate, mi.majorGroupMasterName

```

The following table describes each line of the SQL code:

Line Number	Description
1	SQL SELECT statement used to select data.
2	Selects the <code>mi.locationName</code> column and returns it as <code>locationName</code> , where <code>mi</code> is the table alias defined in line 8.
3	Selects the <code>mi.businessdate</code> column and returns it as <code>businessDate</code> , where <code>mi</code> is the table alias defined in line 8.
4	Selects the <code>mi.majorGroupMasterName</code> column and returns it as <code>MGName</code> , where <code>mi</code> is the table alias defined in line 8.
5	Selects the sum of the <code>mi.salesTotal</code> column and returns it as <code>netSales</code> rounded to 2 decimal places, where <code>mi</code> is the table alias defined in line 8.

Line Number	Description
6	Selects the sum of the <code>mi.discountTotal</code> column and returns it as <code>discountTotal</code> , where <code>mi</code> is the table alias defined in line 8.
7	SQL <code>FROM</code> command to specify the table from which data is returned.
8	Specifies <code>menuItemSales1</code> as the table from which data is returned. The <code>FROM</code> command assigns a SQL alias value of <code>mi</code> to the table.
9	SQL <code>GROUP BY</code> statement that groups returned values into a summary row.
10	Groups returned values <code>mi.locationName</code> , <code>mi.businessDate</code> , and <code>mi.majorGroupMasterName</code> into a summary row.

Under the Drill Step 1 section, select **Enabled** and **Include in export**.

Click **Test Step** to test the query. The returned data appears in the Drill Result section.

- Click **Add JavaScript Step** and then add the following custom JavaScript code to format the returned data. The code uses the `padStart()` method to apply spacing between the returned column data in a row.

```
var input = step1;
var output = ``;
var i;
for (i = 0; i < input.length; i++) {
  if(i == 0) output += `
`
  output += input[i].locationName.padStart(25);
  output += input[i].businessDate.padStart(25);
  output += input[i].MGName.padStart(25);
  output += input[i].netSales.toString().padStart(15);
  output += input[i].discountTotal.toString().padStart(10);
  if(i < input.length) output += `
`
}
}
```

- To view the results, go to the **Results** tab and then click **Run and See Results**.

Reporting and Analytics returns the data as follows.

 **Note:**

If you are viewing the PDF version of this user guide, the lines of data wrap to the next line to fit onto the PDF page.

```
"
      Columbia Location                2018-10-03
Food.TMG      597.16    -19.71
      Columbia Location                2018-10-03    N/A
```



```
Beverages.TMG      165.13    -10.95  
"
```

Export Status Notification

You can proactively monitor the status of self-service exports by enabling email notifications to one or more users.

Emails are sent at the target time of the scheduled export, and if not all locations are completed at that time, another email is sent when all locations are complete. You may receive more than one email per schedule per day.

A PDF file is attached to the email and includes an export status summary and details that help you identify the root causes of delays or failures. The attached document includes:

- A summary section with name, schedule time, target time, and summary by export status.
- Schedule details by location with information including export status, failure details, start/end times, file size, and last successful run.
- Location details with last completed business date, last business date change date and time, last move history date and time, and all transaction posted times.
- Color coding for several fields allows you to quickly identify anomalies.
 - Delivered exports are green, failed exports are red, and all other export statuses are orange.
 - If an export has a file size more than 10% higher or lower than the average file size over the last seven scheduled executions, then it is red, indicating a data anomaly.
 - Exports with a processing time of 1 minute or more are orange. Those longer than 15 minutes are red and require a review of the export configuration and the queries for each step.

Email Triggers

For each export schedule, either one or two emails are sent out. Only one email is sent as soon as all exports are completed prior to the schedule's target time. Two emails are sent if not all locations are completed prior to the target time. In this case a status email is sent at the configured target time and then another notification once the last location has finished. For schedules with an end of day trigger condition, the email is sent as soon as the last locations are complete within the 6-hour scheduling window.

For real-time exports, the email is triggered at the configured target time.

The subject line of the email is designed to convey a high-level status of the export schedule. For real-time exports, it includes the total number of successful exports in the last 24 hours. For all other recurrence types, it includes the number of successful exports and the total number of scheduled exports. The subject line of the email may be one of these two options:

- For daily, weekly, bi-weekly, monthly, financial week, or financial period exports, the subject line is:

<Schedule Name>: *n* of *n* successful (for <exported business date or business date range>).

– For example: Standard GL Export: 27 of 27 successful (for 12/1/22)

- For real-time exports, the subject line is:

<Schedule Name>: *n* successful in the last 24 hours (for <exported business date>).

– For example: Real-time Transactions: 96 successful in the last 24 hours (for 12/1/22)

Email Body

The email body includes additional summarized status information. It includes the schedule name as well as the number of exports that completed successfully prior to, or after the target time. It also includes the number of locations in other statuses, such as waiting for trigger, processing, retrying transport, or failed. Those additional statuses are only included if greater than zero. The following list includes examples for the email body.

Example body when schedule finishes prior to the target time:

- Schedule "Standard GL Export" has finished ahead of target time: All 27 exports delivered within target time
- Schedule "Standard GL Export" has finished ahead of target time: Out of 27 total exports: 25 exports delivered within target time, 1 retrying transport, 1 failed

Example body when schedule reaches target time, but not all exports are completed:

- Schedule "Standard GL Export" reached target time: Out of 27 total exports: 25 delivered within target time, 2 waiting for trigger

Example body of second status email when all exports completed:

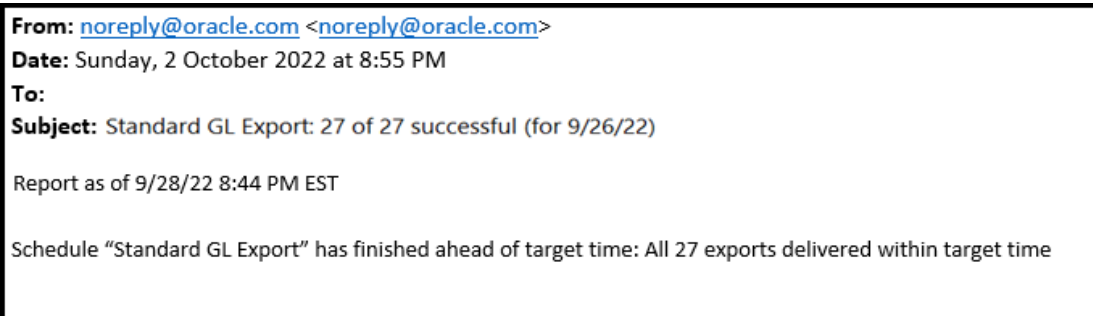
- Schedule "Standard GL Export" has finished: Out of 27 total exports: 21 delivered within target time, 2 delivered outside target time, 1 retrying transport, 3 failed

Example body of a real-time schedule:

- Schedule "Standard GL Export" status: 22 delivered in the last 24 hours, 1 still running, 2 retrying transport, 2 failed

Sample Email

The following images show an example of the email along with the different sections within the document attached to the email.



Self Service Export Status	
Status as of	28/09/22 20:44
Schedule Name	Standard GL Export
Target Time	21:45
Occurrence Type	Daily
Schedule Summary	
Delivered (Within Target Time)	0
Delivered (Outside of Target Time)	27
Queued for Transport	0
In Progress	0
Waiting for Trigger	0
Retrying Transport	0
Failed	0

Schedule Details											
Location name	Export status	Failure detail	Exported business date	Transport time	Latest file size (KB)	Avg. file size last 7 runs (KB)	Export run start time	Export run end time	Last successful execution time	Last successful execution business date	Processing duration (m:ss)
Standard GL Export	Export completed	-	28/09/22	28/09/22 15:10	0	0	28/09/22 15:05	28/09/22 15:05	02/10/22 15:20	02/10/22	00:02
Standard GL Export	Export completed	-	28/09/22	28/09/22 15:10	217.99	217.99	28/09/22 15:05	28/09/22 15:05	02/10/22 15:20	02/10/22	00:02
Standard GL Export	Export completed	-	28/09/22	28/09/22 15:10	146.84	146.84	28/09/22 15:05	28/09/22 15:05	02/10/22 15:20	02/10/22	00:01

Location Details							
Location name	Last completed business date	Last business date change time	Last move history time	Last aggregated business date	Last aggregation completed time	All transaction posted business date	All transaction posted time
Standard GL Export	28/11/18 00:00	29/11/18 01:14	28/11/18 10:12			27/11/18 00:00	28/11/18 13:28
Standard GL Export	28/11/18 00:00	29/11/18 01:14	28/11/18 10:12			27/11/18 00:00	28/11/18 13:28
Standard GL Export							
Standard GL Export							
Standard GL Export							

Configure Export Status Notifications

Set up export status email notifications.

The user must have the **View Schedule Summary and Details** privilege to receive the notifications.

1. In Reporting and Analytics, click **Exports** and then click **Schedules**.
2. Select the schedule that you want to set up notifications for.
3. Click **Notifications**.
4. In the **Status Notification** field, select **Enable**.

5. Select the user or users who should receive the notification emails and then click **Save**.
You can click a role to see all the users within that role.

15

Supported Languages

The following table lists translation languages available for Reporting and Analytics. It also shows additional settings by country for calendar dates and formatting.

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Arabic (United Arab Emirates)	ar-AE	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Arabic (Algeria)	ar-DZ	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Sunday
Arabic (Bahrain)	ar-BH	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Arabic (Egypt)	ar-EG	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Arabic (Iraq)	ar-IQ	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Arabic (Jordan)	ar-JO	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Arabic (Kuwait)	ar-KW	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Sunday
Arabic (Lebanon)	ar-LB	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Arabic (Libya)	ar-LY	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Arabic (Morocco)	ar-MA	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Saturday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Arabic (Oman)	ar-OM	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Arabic (Qatar)	ar-QA	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Arabic (Saudi Arabia)	ar-SA	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Sunday
Arabic (Tunisia)	ar-TN	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: 1,234,567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Arabic (Yemen)	ar-YE	Arabic (Saudi Arabia), ar-SA	<ul style="list-style-type: none"> • Number: • Time and Date: HH:mm:ss D/M/YYYY 24-hour clock • Start of Week: Saturday
Chinese (China)	zh-CN	Chinese (China), zh-CN	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss YYYY/MM/DD 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Chinese (Hong Kong)	zh-HK	Chinese (China), zh-CN	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss YYYY/MM/DD 24-hour clock • Start of Week: Sunday
Chinese (Singapore)	zh-SG	Chinese (China), zh-CN	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
Chinese (Taiwan)	zh-TW	Chinese (China), zh-CN	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss YYYY/MM/DD 24-hour clock • Start of Week: Sunday
Danish (Denmark)	da-DK	Danish (Denmark), da-DK	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
Dutch (Netherlands)	nl-NL	Dutch (Netherlands), nl-NL	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD-MM-YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Dutch (Belgium)	nl-BE	Dutch (Netherlands), nl-NL	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
English (United States of America)	en-US	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (American Samoa)	en-AS	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Australia)	en-AU	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A DD/MM/YYYY 12-hour clock • Start of Week: Monday
English (Belgium)	en-BE	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
English (Belize)	en-BZ	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Botswana)	en-BW	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Canada)	en-CA	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A YYYY-MM-DD 12-hour clock • Start of Week: Sunday
English (Guam)	en-GU	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Hong Kong SAR China)	en-HK	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
English (India)	en-IN	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 12,34,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Ireland)	en-IE	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
English (Israel)	en-IL	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Sunday
English (Jamaica)	en-JM	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Malta)	en-MT	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
English (Marshall Islands)	en-MH	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Mauritius)	en-MU	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Namibia)	en-NA	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (New Zealand)	en-NZ	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A DD/MM/YYYY 12-hour clock • Start of Week: Monday
English (Northern Mariana Islands)	en-MP	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
English (Pakistan)	en-PK	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Philippines)	en-PH	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Singapore)	en-SG	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
English (South Africa)	en-ZA	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Trinidad and Tobago)	en-TT	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
English (United Kingdom)	en-GB	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
English (U.S. Minor Outlying Islands)	en-UM	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (U.S. Virgin Islands)	en-VI	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
English (Zimbabwe)	en-ZW	English (United States of America), en-US	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday
Finnish (Finland)	fi-FI	Finnish (Finland), fi-FI	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
French (France)	fr-FR	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Belgium)	fr-BE	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Benin)	fr-BJ	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Burkina Faso)	fr-BF	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Burundi)	fr-BI	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
French (Cameroon)	fr-CM	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Canada)	fr-CA	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss YYYY-MM-DD 24-hour clock • Start of Week: Sunday
French (Central African Republic)	fr-CF	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Chad)	fr-TD	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Comoros)	fr-KM	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
French (Congo - Brazzaville)	fr-CG	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Congo - Kinshasa)	fr-CD	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Côte d'Ivoire)	fr-CI	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Djibouti)	fr-DJ	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Equatorial Guinea)	fr-GQ	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
French (Gabon)	fr-GA	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Guadeloupe)	fr-GP	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Guinea)	fr-GN	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Luxembourg)	fr-LU	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Madagascar)	fr-MG	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
French (Mali)	fr-ML	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Martinique)	fr-MQ	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Monaco)	fr-MC	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Niger)	fr-NE	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Rwanda)	fr-RW	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
French (Réunion)	fr-RE	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Saint Barthélemy)	fr-BL	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Saint Martin)	fr-MF	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Senegal)	fr-SN	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
French (Switzerland)	fr-CH	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
French (Togo)	fr-TG	French (France), fr-FR	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
German (Germany)	de-DE	German (Germany), de-DE	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
German (Austria)	de-AT	German (Germany), de-DE	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
German (Belgium)	de-BE	German (Germany), de-DE	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
German (Liechtenstein)	de-LI	German (Germany), de-DE	<ul style="list-style-type: none"> • Number: 1'234'567.89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
German (Luxembourg)	de-LU	German (Germany), de-DE	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
German (Switzerland)	de-CH	German (Germany), de-DE	<ul style="list-style-type: none"> • Number: 1'234'567.89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
Italian (Italy)	it-IT	Italian (Italy), it-IT	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Italian (Switzerland)	it-CH	Italian (Italy), it-IT	<ul style="list-style-type: none"> • Number: 1'234'567.89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
Japanese (Japan)	ja-JP	Japanese (Japan), ja-JP	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: HH:mm:ss YYYY/MM/DD 24-hour clock • Start of Week: Sunday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Korean (South Korea)	ko-KR	Korean (South Korea), ko-KR	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: A h:mm:ss YYYY.MM.DD. 12-hour clock • Start of Week: Sunday
Norwegian (Norway)	no-NO	Norwegian (Norway), no-NO	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
Portuguese (Portugal)	pt-PT	Portuguese (Portugal), pt-PT	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Portuguese (Brazil)	pt-BR	Portuguese (Brazil), pt-BR	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: HH:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Sunday
Russian (Russia)	ru-RU	Russian (Russia), ru-RU	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: H:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Russian (Republic of Moldova)	ru-MD	Russian (Russia), ru-RU	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: H:mm:ss DD.MM.YYYY 24-hour clock • Start of Week: Monday
Spanish (Spain)	es-ES	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Argentina)	es-AR	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Bolivia)	es-BO	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Chile)	es-CL	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Spanish (Colombia)	es-CO	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Costa Rica)	es-CR	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Dominican Republic)	es-DO	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A DD/MM/YYYY 12-hour clock • Start of Week: Monday
Spanish (Ecuador)	es-EC	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (El Salvador)	es-SV	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Spanish (Equatorial Guinea)	es-GQ	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Guatemala)	es-GT	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Honduras)	es-HN	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Mexico)	es-MX	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Nicaragua)	es-NI	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Spanish (Panama)	es-PA	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Paraguay)	es-PY	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Peru)	es-PE	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Puerto Rico)	es-PR	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (United States)	es-US	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: h:mm:ss A MM/DD/YYYY 12-hour clock • Start of Week: Sunday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Spanish (Uruguay)	es-UY	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Spanish (Venezuela)	es-VE	Spanish (Spain), es-ES	<ul style="list-style-type: none"> • Number: 1.234.567,89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Monday
Swedish (Sweden)	sv-SE	Swedish (Sweden), sv-SE	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss YYYY-MM-DD 24-hour clock • Start of Week: Monday
Swedish (Finland)	sv-FI	Swedish (Sweden), sv-SE	<ul style="list-style-type: none"> • Number: 1 234 567,89 • Time and Date: HH:mm:ss YYYY-MM-DD 24-hour clock • Start of Week: Monday
Thai (Thailand)	th-TH	Thai (Thailand), th-TH	<ul style="list-style-type: none"> • Number: 1,234,567.89 • Time and Date: H:mm:ss DD/MM/YYYY 24-hour clock • Start of Week: Sunday

Language and Country	Locale	User Interface Translation Language	Country-specific settings including number formatting, date and time formatting, and start of week settings.
Turkish (Turkey)	tr-TR	Turkish (Turkey), tr-TR	<ul style="list-style-type: none">• Number: 1.234.567,89• Time and Date: HH:mm:ss DD.MM.YYYY 24-hour clock• Start of Week: Monday

Changing the Language

1. In Reporting and Analytics and then follow one of these steps:
 - Click the user menu in the top right-hand corner of the screen and then click **My Profile**.
 - Click the side navigation menu, click **Administration**, click **Users**, and then select the user.
2. In the **Language** field, select your preferred language.
3. Click **Save and Close**.