

Oracle CRM On Demand Advanced Analytics Workshop

Student Guide

D56684GC40

Edition 4.0

May 2011

D73187

ORACLE

Author

Ruth Kale-Fok

**Technical Contributors
and Reviewers**

Bihn Le

Shankar Meganatha

Editors

Daniel Milne

Pj Schemenaur

Graphic Designer

Rajiv Chandrabhanu

Publishers

Sumesh Koshy

Sujatha Nagendra

Copyright © 2011, Oracle and/or its affiliates. All rights reserved.

Disclaimer

This document contains proprietary information and is protected by copyright and other intellectual property laws. You may copy and print this document solely for your own use in an Oracle training course. The document may not be modified or altered in any way. Except where your use constitutes "fair use" under copyright law, you may not use, share, download, upload, copy, print, display, perform, reproduce, publish, license, post, transmit, or distribute this document in whole or in part without the express authorization of Oracle.

The information contained in this document is subject to change without notice. If you find any problems in the document, please report them in writing to: Oracle University, 500 Oracle Parkway, Redwood Shores, California 94065 USA. This document is not warranted to be error-free.

Restricted Rights Notice

If this documentation is delivered to the United States Government or anyone using the documentation on behalf of the United States Government, the following notice is applicable:

U.S. GOVERNMENT RIGHTS

The U.S. Government's rights to use, modify, reproduce, release, perform, display, or disclose these training materials are restricted by the terms of the applicable Oracle license agreement and/or the applicable U.S. Government contract.

Trademark Notice

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

Contents

1 Course Introduction

- Objectives 1-2
- Live Virtual Class 1-3
- Emoticons 1-4
- Chat 1-5
- Poll or Quiz 1-6
- Instructor and Class Participants 1-7
- Public Chat 1-8
- Quiz 1-9
- Course Audience 1-10
- Course Prerequisites 1-11
- Course Goal 1-12
- Course Objectives 1-13
- Course Agenda: Day 1 1-14
- Course Agenda: Day 2 1-15
- Course Agenda: Day 3 1-16
- Course Methodology 1-17
- Resources 1-18
- Online Help 1-19
- Training and Support Center 1-20
- Reports Resources 1-21
- Analytics and Reports Forum 1-22
- Summary 1-23
- eAttendance 1-24

2 Reporting Methodology

- Objectives 2-2
- Report Design Methodology 2-3
- Clearly Define the Question 2-5
- Consider the Audience 2-6
- Clarify the Purpose 2-7
- Discussion Activity 2-8
- Report Design Methodology 2-9
- Definition of Performance 2-10
- Application Performance 2-11

Demonstration 2-13
Tips for Optimal Performance 2-14
Optimizing Performance 2-15
Optimizing Analytics Performance 2-16
Report Design Methodology 2-17
Identify the Subject Area 2-18
Analytics and Reporting Subject Areas 2-20
Analytics Versus Reporting Subject Areas 2-21
Identify the Driving Object 2-22
Subject Area Types 2-23
Simple Subject Areas 2-24
Multi-Fact Subject Areas 2-25
Summary Subject Areas 2-26
Many-to-Many Subject Areas 2-27
Federated Subject Areas 2-28
Demonstration 2-29
Report Design Methodology 2-30
Decide What Is Necessary 2-31
Finding the Data Columns 2-32
Record Type ID Columns 2-36
Data Behavior 2-37
Discussion Activity 2-38
Build Your Report 2-39
Tips for Success 2-40
Summary 2-41

3 Reviewing the Basics

Objectives 3-2
Quiz 3-3
Demonstration 3-4
Step 1: Define Criteria 3-5
Filter Data 3-6
Reposition Columns 3-7
Step 2: Create Layout 3-8
Format the Layout 3-9
Save the Report 3-10
Demonstration 3-11
Advanced Custom Objects Subject Area 3-12
Advanced Custom Objects 3-13
Tips for Success 3-14
Summary 3-15

4 Formatting Tables

Quiz 4-2

Objectives 4-5

Formatting Tables 4-6

Formatting Columns 4-7

Demonstration 4-8

Formatting Tables 4-9

Build a Report 4-10

Identifying Columns to Emphasize 4-11

Format Styles 4-12

Style Tab 4-13

Advanced Options 4-14

Format Columns 4-15

Column Format Tab 4-16

Data Format Tab 4-17

Add Conditional Formats 4-18

Conditional Format Tab 4-19

Demonstration 4-20

Adding the Conditions 4-21

Specifying Filter Conditions 4-22

Making Formatting Selections 4-23

Formatting with an Image 4-24

Image Selection 4-25

Tips for Success 4-26

Summary 4-27

Practice Exercises 4-28

Practice 4-1 4-29

5 Working with Pivot Tables

Quiz 5-2

Objectives 5-5

Pivot Tables 5-6

Pivot Table Data 5-7

Adding Pivot Tables to Reports 5-8

Selecting Pivot Table Columns 5-10

Demonstration 5-11

Adding a Pivot Table View 5-12

Adding Pivot Tables to Reports 5-13

Demonstration 5-14

Pages Section 5-15

Pages Section: Multiple Drop-Down Lists 5-16
Sections Section 5-17
Rows and Columns Sections 5-18
Measures Section 5-19
Excluded Section 5-20
Delete Unused Columns 5-21
Adding Pivot Tables to Reports 5-22
Defining Row and Column Totals 5-23
Different Aggregation than Table View 5-24
Demonstration 5-25
Setting Pivot Table Aggregation Rule 5-26
Changing Format Labels 5-27
Displaying Relative Values 5-28
Demonstration 5-29
Labels Only (No Totals) 5-30
Adding Pivot Tables to Reports 5-31
Demonstration 5-32
Add Formatting: Green Bar Styling 5-33
Adding Formatting: Charts 5-34
Demonstration 5-35
New Calculated Item 5-36
Tips for Success 5-37
Summary 5-38
Practice 5-1 5-39

6 Using Advanced Layout Views

Quiz 6-2
Objectives 6-3
Using Advanced Views: Column Selector 6-4
Using Advanced Views: Legend 6-5
Advanced Layout Views 6-6
Column Selector Views 6-7
Planning Column Selectors 6-8
Demonstration 6-9
Building a Column Selector View 6-10
Specifying Column Choices 6-11
Finalizing the Report Layout 6-12
Legend Views 6-13
Building a Legend View 6-14
More Report Views 6-16
Gauge View 6-17

Ticker View 6-19
Building a Ticker View 6-20
Narrative Reports 6-21
Tips for Success 6-22
Summary 6-23
Practices 6-1 and 6-2 6-24

7 Using Different Types of Filters

Quiz 7-2
Objectives 7-3
Filtering Data 7-4
Applying Saved Filters 7-5
Using Filters 7-6
Create a Filter 7-7
Determining the Filter Column 7-8
Consider Performance When Filtering 7-9
Demonstration 7-10
Less Obvious Filter Operators 7-11
Selecting Filter Values 7-12
Select Filter Type 7-13
Filtering with an SQL Expression 7-14
Using Variables in Filters 7-15
Combine Filters 7-16
Cut, Copy, and Paste Filters 7-17
Demonstration 7-18
Combining Filters with AND or OR 7-19
Using the Filtered Metrics Function 7-20
Demonstration 7-21
Inserting the Filtered Metrics Function 7-22
Filtered Metrics Function Versus Report Filters 7-23
Tips for Success 7-24
Summary 7-25
Practices 7-1 and 7-2 7-26

8 Filtering Based on the Results of Another Report

Quiz 8-2
Objectives 8-3
Combining Subject Areas 8-4
Creating Consistent Result Sets 8-5
Using Another Report to Filter Results 8-6
Create Base Report 8-7

Building a New Report 8-8
Keeping the Base Report Simple 8-9
Demonstration 8-10
Saving the Base Report 8-11
Select Base Report as a Filter 8-12
Demonstration 8-13
Using the Advanced Filter Option 8-14
Tips for Success 8-15
Summary 8-16
Practice 8-1 8-17

9 Combining Reports with Set Operations

Quiz 9-2
Objectives 9-4
Filtered Data 9-5
Solution: Combining Reports 9-6
Negative Reporting 9-7
Solution: Combining Reports 9-8
Driving Object 9-9
Combining Reports 9-10
Reviewing Set Operators 9-11
Set Operators 9-12
Planning and Navigating 9-13
Plan Ahead 9-14
Build Filter Reports 9-15
Demonstration 9-16
Build the Base Report 9-17
Demonstration 9-18
Combining Reports Process 9-19
Demonstration 9-20
Navigation: Result Columns 9-21
Navigation: Base Report 9-22
Navigation: Matching Report 9-23
Building a Combined Report 9-24
Considerations for Combining Reports 9-25
Demonstration 9-26
Add Filters 9-27
Demonstration 9-28
Modifying Combined Reports 9-29
Adding Columns 9-30
Demonstration 9-31

- Removing Columns 9-32
- Adding Reports 9-33
- Filtered Data 9-34
- Solution: Combining Reports 9-35
- Demonstration 9-36
- Tips for Success 9-37
- Summary 9-38

10 Defining Column Filter Prompts

- Quiz 10-2
- Public Chat: Review 10-3
- Objectives 10-4
- Column Filter Prompts 10-5
- Demonstration 10-6
- Creating Column Filter Prompts 10-7
- Decide When to Use Prompts 10-8
- Examples of When to Use Prompts 10-9
- Define Prompt Properties 10-11
- Single Value from Drop-Down List 10-12
- Browse Through Choices 10-13
- Allow User to Constrain Choices 10-15
- Constrain Choices for Multiple Selections 10-16
- Skip Prompt 10-17
- Demonstration 10-18
- Single Value from Drop-Down List 10-19
- Single Value from a Filtered List 10-20
- SQL Results Option 10-21
- Best Choice for Date Prompts 10-22
- Create Multiple Prompts 10-23
- Multiple Prompts Make Multiple Filters 10-24
- Linking Prompts 10-25
- Demonstration 10-26
- Tips for Success 10-27
- Summary 10-28
- Practice 10-1 10-29

11 Including Column Formulas

- Quiz 11-2
- Objectives 11-4
- Adding Flexibility with Formulas 11-5
- Using Formulas and Expressions 11-6

Where to Apply Formulas 11-7
Edit Column Formulas 11-8
Add Formulas to Filters 11-9
Add SQL to Filters 11-10
Create Mathematical Formulas 11-11
Using Math Functions 11-12
Example 1: Commission 11-13
Demonstration 11-14
Combining Field Values 11-15
CAST Statement 11-16
Example 2: Ratio 11-17
Demonstration 11-18
Aggregation Rules 11-19
Aggregate Functions 11-20
Tips for Success 11-21
Refer to Online Help 11-22
Summary 11-23
Practice 11-1 11-24

12 Writing Date and Time Formulas

Quiz 12-2
Objectives 12-5
Make SQL Your Friend 12-6
SQL Expressions in CRM On Demand Answers 12-7
Date and Date/Time 12-8
Different Types of Date Columns 12-9
Dynamic Date Dimension 12-10
Time and Date Formulas 12-11
Demonstration 12-12
Rolling Date Filters 12-13
Using CAST and TIMESTAMP 12-14
Demonstration 12-15
Session Variables 12-16
Session Variables in Filters and Formulas 12-17
Tips for Success 12-18
Summary 12-19
Practices 12-1 and 12-2 12-20

13 Adding Conditional Values to a Report

- Quiz 13-2
- Objectives 13-3
- CASE Statements 13-4
- Example 1: Sort the Data 13-5
- Sort on the CASE Statement Column 13-6
- Building a CASE Statement 13-7
- Plan the CASE Statement 13-8
- Identify the Conditions 13-9
- Identify the Values 13-10
- Write the CASE Statement 13-11
- Demonstration 13-12
- Add a Column for the CASE Statement 13-13
- Modify the Column Formula 13-14
- Use the Selection Pane 13-15
- Apply Aggregation Rules 13-16
- Demonstration 13-17
- Set a Default Aggregation Rule 13-18
- Aggregation Rules 13-19
- Example 2: Nested CASE Statements 13-20
- Branching in Nested Statements 13-21
- Example 3: Combining Conditions 13-22
- Use Bins 13-23
- Demonstration 13-24
- Group Data in Categories 13-25
- Create a CASE Statement 13-27
- Bin Results 13-28
- CASE Statement Tips 13-29
- Demonstration 13-31
- Tips for Success 13-32
- Summary 13-33
- Practices 13-1 and 13-2 13-34

14 Linking Reports

- Quiz 14-2
- Objectives 14-3
- Drill-Down Paths 14-4
- Examples of Drill-Down Paths 14-5
- Linking Reports 14-6
- Create the Target Report 14-7
- Set the Filter Operator 14-8

Demonstration 14-9
Save the Target Report 14-10
Create the Initiating Report 14-11
Where to Set Interaction 14-12
Select the Target Analysis 14-13
Demonstration 14-14
Create Action Links 14-15
Action Links 14-16
Set Column Style: Action Link 14-17
Set Column Value Format: Data Format 14-18
Tips for Success 14-19
Summary 14-20
Practices 14-1 and 14-2 14-21

15 Embedding Analytics

Quiz 15-2
Objectives 15-3
Embedded Analytics 15-4
Examples of Embedded Analytics 15-5
Example: Analysis for a Specific Record 15-6
Example: Narrative Report 15-7
Demonstration 15-8
Links to Analytics 15-9
Considerations for Embedded Reports 15-11
“is prompted” Filter 15-12
Get Report Information 15-13
Report Properties 15-14
Create a Web Link Field 15-16
Set Web Link Properties 15-18
Syntax for Web Link URL 15-19
Web Link URL 15-27
Demonstration 15-28
Display the New Field 15-29
Make the Link Field Available 15-30
Demonstration 15-31
Tips for Success 15-32
Summary 15-33
Practice 15-1 15-34

16 Creating Custom Dashboards

- Quiz 16-2
- Objectives 16-3
- Examples 16-4
- Dashboards 16-5
- Prebuilt Dashboards 16-6
- Demonstration 16-7
- Creating Custom Dashboards 16-8
- Plan the Dashboard 16-9
- Plan the Design 16-10
- Select Reports 16-11
- Sketch the Dashboard 16-12
- Create the Dashboard 16-13
- Demonstration 16-14
- Create a New Dashboard 16-15
- Dashboard Editor 16-16
- Identify Dashboard Objects 16-17
- Guided Navigation Links 16-18
- Design the Dashboard 16-19
- Demonstration 16-20
- Adding and Arranging Columns 16-21
- Adding and Arranging Sections 16-22
- Demonstration 16-23
- Select Reports 16-24
- Add Pages 16-25
- Add Dashboard Prompts 16-26
- Dashboard Prompts 16-27
- Demonstration 16-28
- Create a New Prompt 16-29
- Demonstration 16-30
- Add a Saved Prompt 16-31
- Save the Dashboard 16-32
- Tips for Success 16-33
- Summary 16-34
- Practice 16-1 16-35

17 Tracking Usage and Performance

- Quiz 17-2
- Objectives 17-3
- Questions About Usage 17-4
- Usage 17-5

Performance 17-6
Usage Tracking 17-7
Standard Usage Tracking Reports 17-8
Viewing Standard Usage Tracking Reports 17-9
Analytics Performance 17-10
Usage Tracking Analysis Subject Area 17-14
Demonstration 17-16
Usage Dimensions 17-17
Granularity 17-18
Grain of Usage Tracking Metrics 17-19
Visibility to Usage Tracking Data 17-22
Folders for Usage Tracking Reports 17-23
Access to Usage Tracking Folders 17-24
Tips for Success 17-26
Summary 17-27

18 Wrap-Up

Additional Resources 18-2
Course Overview 18-4
Thank You 18-5