

Oracle CRM On Demand Advanced Analytics Workshop NEW

Duration: 3 Days

What you will learn

In this course, students learn to use advanced features of Oracle CRM On Demand Answers to support custom business reporting needs. These include learning how to: apply advanced formatting and layouts; create and apply multiple filters for rolling date analyses and negative reporting; use advanced formulas and calculated columns; build comparative reports using prompts; and, directly link reports. These skills enable advanced users to build complex reports that display results simply.

Hands-on exercises based on real business examples reinforce the skills and knowledge taught in the course. This provides an opportunity for students to practice new skills in a safe environment with instructor support.

Before the start of the class, students will have to complete the following prerequisites:

Siebel CRM On Demand: Build Your Own Reports: 1 Control Visibility to Report Data

Siebel CRM On Demand: Build Your Own Reports: 2 Create List Reports

Siebel CRM On Demand: Build Your Own Reports: 3 Format Custom Reports

Siebel CRM On Demand: Build Your Own Reports: 4 Create Charts for Reports

Siebel CRM On Demand: Build Your Own Reports: 5 Create Pivot Tables for Reports

Siebel CRM On Demand: Build Your Own Reports: 6 Control Access to Reports

To access those prerequisites, please follow the steps below:

Go to www.oracle.com and log in

If you don't have an account, click the Register for a free Oracle Web account link on top of the page to create one

After you log in, click the Education link on the right

Click the Knowledge Center link on the left

From the Knowledge Center page, click the Free Trial link on the right

Read the Free Trial Subscription terms and accept

Type the pre-requisite name in the Search box and click Go

Audience

Reports Developer

Technical Administrator

Technical Consultant

Prerequisites

Suggested Prerequisites

Ability to create reports using Oracle CRM OnDemand Answers

Basic familiarity with the Oracle CRM On Demand application

Course Objectives

- Identify and apply formatting options to emphasize key data
- Design and format effective pivot tables to show data from multiple perspectives
- Define prompts to allow users to filter information in an analysis
- Use advanced filtering options to satisfy report data requirements
- Filter data based on the results of another analysis
- Combine reports to create complex filters
- Use column formulas to calculate data in an analysis
- Write rolling date filters to display results based on relative time frames
- Include session variables in filters and formulas
- Create links to navigate users through a set of reports
- Use action links to pass record details to a report so that the report results are record-specific
- Create analyses that answer defined business questions

Course Topics

Reporting Methodology

- Identifying Subject Areas
- Finding Data Columns
- Analyzing Custom Objects
- Designing Your Report

Formatting Tables

- Column Formatting
- Conditional Formatting
- Using Images

Working With Pivot Tables

- Adding Totals and Relative Values
- Adding Duplicate Columns

Using Advanced Layout Views

- Column Selectors
- Gauge Views
- Adding a Legend
- Using a Narrative View

Using Filters

- Filtering with SQL Expressions
- Using Variables
- Filtering Based on Results of Another Analysis

Combining Reports with Set Operations

Defining Column Filter Prompts

- When to Use Prompts
- Date Range Prompts

Column Formulas and Conditional Expressions

Where to Apply Formulas
Creating Mathematical Formulas

Date and Time Formulas

Types of Date Formulas
Rolling Date Filters
Using Session Variables

Conditional Values

Using CASE Statements
Applying Aggregation Rules

Navigating Users to Analyses

Defining Drill-Down Paths
Creating a Web Link field