

(20D) Oracle CX Sales and Oracle B2B Service: Analytics Ed 2

Oracle CX Sales and B2B Service

DURATION

3 Days

MODULES

17 Lectures

COURSE CODE

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Course Overview

This training applies to Oracle CX Sales and Oracle B2B Service.

What You Will Learn

- 1 Course Introduction
 - Learning Objectives
 - Instructor and Class Participants
 - Course Audience
 - Course Prerequisites
 - Course Goal
 - Course Objectives
 - Course Methodology
 - Course Materials
 - Course Agenda
- 2 Overview
 - Learning Objectives
 - Analytics
 - Analyses
 - Reports
 - Prebuilt Analytics
 - User Experience
 - Administrator Experience
 - BI Catalog
 - Subject Areas
 - Oracle Analytics Cloud
 - Lesson Highlights
 - Practice
- 3 Analyses
 - Learning Objectives
 - Analytics

- Analysis
- Subject Areas
- Subject Area Folders
- Dimension Folders
- Facts Folders
- Facts and Measures
- Aggregation Measures
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- iv
- Structure of Facts Folders
- BI Catalog
- BI Analysis Generation Tools
- Creating a New Analysis Using BI Composer
- 1. Select Subject Area
- 2. Select Columns
- 3. Select Views
- 4. Edit Table and Graph
- 5. Sort and Filter
- 6. Highlight
- 7. Save the Analysis
- 8. Test the Analysis
- Creating a New Analysis Using BI Answers
- 1. Select Subject Area
- 2. Select Columns
- 3. Select Views
- 4. Select Sort
- 5. Select Filter
- 6. Highlight
- 7. Save the Analysis
- 8. Test the Analysis
- Editing a Saved Custom Analysis
- Lesson Highlights
- Practices
- 4 Multiple Subject Areas
- Learning Objectives
- Multiple Subject Area Analyses
- Multiple Subject Areas
- Creating a Multiple Subject Area Analysis
- Common and Local Dimensions
- Common and Local Dimensions Example
- Multiple Subject Area Analysis Criteria and Results
- Repeated Data in Results
- Performance Considerations
- Lesson Highlights
- Practice
- 5 Filters

- Learning Objectives
- Filters
- Advanced Filters
- Filter Types
- Inline Filters
- Named Filters
- Variables
- Variable Types
- Dynamic Filtering
- SQL Expressions
- SQL Expression Filtering
- Function Filters
- Grouping Filters
- Saved Analysis Filters
- Analysis Prompts
- Adding an Inline Prompt to an Analysis
- Defining Prompt Properties
- Multiple Column Filter Prompts
- Lesson Highlights
- Practices
- 6 Selection Steps and Groups
- Learning Objectives
- Using Selection Steps to Limit Data in Analyses
- How Filters and Selection Steps Differ
- Create a New Step
- Select the Step Type
- Members
- Groups
- Create a Group
- 1. Create a New Member Group
- 2. Define the Group Properties
- 3. Apply Formatting
- 4. Verify the Results
- Adding Groups and Calculated Items
- Applying Conditions
- Selecting Members Based on Hierarchy
- Selecting Members Based on Family Relationship
- Saving Selection Steps as a Group
- Lesson Highlights
- Practices
- v
- 7 Visualizing Data
- Learning Objectives
- Views
- Table
- Graph

- Funnel
- Pivot Table
- Gauge
- Adding a View
- Creating a View
- 1. Add a View
- 2. Configure the Layout
- 3. Manage Settings and Properties
- The Pareto Principle
- Pareto Chart
- Add a Pareto Chart
- Compound Layout
- Lesson Highlights
- Practices
- 8 Pivot Tables
- Learning Objectives
- Pivot Tables in General
- Pivot Tables in BI
- Create a Pivot Table
- 1. Select Analysis Columns
- 2. Select Pivot Table View
- 3. Open Pivot Table Editor
- 4. Rearrange Elements as Necessary
- Formatting Overall Appearance
- Formatting Pivot Table Components
- Formatting Sections
- Formatting to Avoid Duplication
- Formatting Pivot Table Layout
- Showing Results in Pivot Tables
- Sorting
- Sorting Data in Views
- Clearing Sorts
- Totals in Pivot Tables
- Pivot Table Measures
- Showing an Item's Relative Value
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- Showing the Relative Value of an Item
- 1. Duplicate the Measure
- 2. Rename the Duplicate Measure
- 3. Select the Show Data As Option
- 4. View the Results
- Calculations in Pivot Tables
- Building Calculations by Using Functions
- Building Calculations by Using Formulas
- Displaying Running Sums in Pivot Tables
- Hierarchical Dimensions

- Identifying Subject Areas Containing Hierarchical Dimensions

- Multiple Hierarchical Columns Create a Pivot Table

- Using Hierarchical Columns

- Hierarchical Columns

- Hierarchical Columns Settings

- Lesson Highlights

- Practices

- 9 Infolets

- Learning Objectives

- Infolets

- Infolet Content

- Work with Infolets

- Navigating Infolets

- Drilling Down to Detailed Reports

- Managing Infolets

- Configuring Infolets

- Administer Infolets

- Managing Infolet Access

- Modifying Existing Infolets

- Create a New Infolet

- 1. Activate a Sandbox

- 2. Start Page Composer

- 3. Enter Infolet Specifications

- 4. Add an Analytic

- 5. Select Analytic Content

- 6. Associate a Detailed Report (Optional)

- 7. Repeat for Each Infolet View

- Designing New Infolet Content

- Create a Performance Tile

- 1. Select an Existing Analytic

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- 2. Add a Performance Tile View

- 3. Format the Performance Tile

- Control Infolet Caching

- Actionable Infolets

- Saved Searches for Actionable Infolets

- Lesson Highlights

- Practices

- 10 Dashboards

- Learning Objectives

- Dashboards

- Working with Dashboards

- Navigate Among Dashboards

- View Dashboards

- Interact with Dashboards

- Configure Dashboards

- 1. Activate a Sandbox
- 2. Make a Dashboard Visible
- 3. Navigate to the Dashboard
- 4. Start Page Composer
- 5. Select a Page Layout
- 6. Add an Analytic
- 7. Select Analytic Content
- 8. Format the Analytic (optional)
- Dashboard Components
- Lesson Highlights
- Practice
- 11 Embedded Analytics
- Learning Objectives
- Object Pages
- Analytic Pages
- Embedding Analytics Within Object Pages
- Enable Object Landing Page Subtabs
- Embed Analytics within Object Landing Pages
- 1. Activate a Sandbox
- 2. Navigate to an Object Landing Page
- 3. Start Page Composer
- 4. Select an Analytics Subtab
- 5. Select a Page Layout
- 6. Add Analytic Content
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- Object Detail Pages
- Enable Object Detail Page Subtabs
- 1. Edit the Object Page Settings
- 2. Select a Details Page Layout
- 3. Enable an Analytics Page Subtab
- Embed Analytics within Object Detail Page Subtabs
- Drill Down on a Record (Additional Step)
- Create New Analytics Pages
- 1. Add a Page Subtab
- 2. Select the Object
- 3. Configure the Subtab
- 4. Add Analytics
- Custom Object Analytics
- Considerations
- Lesson Highlights
- Practices
- 12 Analytics Distribution
- Learning Objectives
- Business Challenges and Solutions: Scheduling
- Scheduling Analytics
- Agents

- Priority and Permission Settings
- Schedule
- Conditions
- Content
- Recipients
- Destinations
- Actions
- Create an Agent
- Review Agent Output
- Reports as Scheduled Jobs
- Create a Job Definition to Run a Report as a Scheduled Job
- Schedule the Report
- Review the Results
- Other Distribution Mechanisms
- Export an Analysis
- Briefing Books
- Create a Briefing Book
- BI Publisher
- BI Publisher in Fusion Applications
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- Lesson Highlights
- Practice
- 13 Analytics Access
- Learning Objectives
- Oracle Business Intelligence Security Model
- Duty Roles
- Job Roles
- Analytics Security for Catalog Folders
- Analytics Security for Individual Reports, Analyses, and Dashboards
- Security Roles Overview
- BI Catalog Overview
- Configuring Analytics Security
- Grant Analytics Access to Job Roles
- Create Duty Roles
- Modify Access to Folders or Reports
- Recommended Practices
- Custom Reports
- Reporting and Custom Objects
- Hiding Reports to Which a User Does Not Have Permission
- 1. Create a Transaction Analysis Duty Role
- Add the Transaction Analysis Duty Role to the Security Role for the Custom
- Object
- 3. Create a Subfolder of the Custom Folder in the BI Catalog
- 4. Put All Reports and Analyses for the Custom Object in the Subfolder
- 5. Test the Results
- Lesson Highlights

- Practices
- 14 Historical Trending
- Learning Objectives
- Historical Trending Analytics
- Historical Trending Requirements
- Configure Historical Trending Analytics
- Configure the Historical Trending Profile Option
- Schedule the Historical Trending Job
- Create Historical Trending Reports and Analyses
- Lesson Highlights
- Practice
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- 15 Custom Subject Areas
- Learning Objectives
- Custom Fields
- Custom Subject Areas
- Why Use Custom Subject Areas (CSAs)?
- Creating Custom Subject Areas
- Multiple Child Objects for Custom Subject Areas
- Create a Custom Subject Area
- 1. Create the Custom Subject Area
- 2. Add the Primary Object
- 3. Add Child Objects
- 4. Select the Fields
- 5. Select the Measures
- 6. If Necessary, Apply Date Leveling
- 7. Specify Security
- 8. Review and Publish the Subject Area
- 9. Examine the Subject Area
- Lesson Highlights
- Practice
- 16 Analytics Navigation
- Learning Objectives
- Analytics Navigation
- Analysis to Analysis Navigation
- Analysis to Transaction Page Navigation
- Action Links
- Adding an Action Link to Navigate to BI Content
- 1. Create the Analysis
- 2. Add an Action Link to the Column
- 3. Configure the Action Link
- 4. Test the Action Link
- Adding an Action Link to Navigate to an Application Page
- 1. Create the Analysis
- 2. Add an Action Link to the column

- 3. Configure the Action Link
- 4. Test the Action Link
- Lesson Highlights
- Practices
- 17 Analytics Use Cases
- Learning Objectives
- Use an Incremental Approach to Building an Analysis or Report
- Analytics Use Cases Discussed
- Activity Reporting
- Activity Reporting: Solution
- Activity Reporting: Design
- Activity Reporting: Results
- Revenue Reporting by Close Period
- Revenue Reporting by Close Period: Design
- Revenue Reporting by Close Period: Results
- Pipeline by Sales Stage with Target
- Pipeline by Sales Stage with Target: Design
- Pipeline by Sales Stage with Target: Results
- Accounts That My Team or I Own
- Accounts That My Team or I Own: Design
- Accounts That My Team or I Own: Results
- Review Current Sales and Compare
- Review Current Sales and Compare: Design 1
- Review Current Sales and Compare: Results 1
- Review Current Sales and Compare: Design 2
- Review Current Sales and Compare: Results 2
- Review Current Sales and Compare: Design 3
- Review Current Sales and Compare: Results 3
- Review Current Sales and Compare: Final Results
- Performance Considerations
- Additional Resources
- Lesson Highlights