

Siebel CRM On Demand Advanced Analytics Workshop

Duration: 3 Days

What you will learn

In this course, students learn to use advanced features of Answers On Demand 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.

Learn To:

- Filter data based on the results of another analysis
- Link directly from a record to a record-specific analysis
- Use column and conditional formatting to emphasize key data
- Use simple SQL statements to filter your data
- Create effective pivot tables that provide multiple data perspectives
- Write time and date formulas and create rolling date reports

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

Prerequisites

Required Prerequisites

Building Your Own Reports Webinar (course prerequisite)

Basic familiarity with the Siebel CRM On Demand application

Ability to create reports using Siebel CRM OnDemand Answers

Course Objectives

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

Identify and apply formatting options to emphasize key data

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 analyses that answer defined business questions

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

Course Topics

Reporting Methodology

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

Linking to a Record-Specific Report