

Oracle CRM On Demand Advanced Analytics Workshop - LVC 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.

Learn To:

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

Filter data based on the results of another analysis

Link directly from a record to a record-specific analysis

Before the start of the class, students will have to complete the following prerequisites: Oracle CRM On Demand

Webinar: Build Reports: 1. Control Visibility

Oracle CRM On Demand Webinar: Build Your Own Reports: 2 Create List Reports

Oracle CRM On Demand Webinar: Build Your Own Reports: 3 Format Custom Reports

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

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

Oracle CRM On Demand Webinar: 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.

A Live Virtual Class (LVC) is exclusively for registered students; unregistered individuals may not view an LVC at any time. Registered students must view the class from the country listed in the registration form. Unauthorized recording, copying, or transmission of LVC content may not be made.

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

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
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

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