

Key Topics

- Customizing Column Formatting to Emphasize Key Data
- Creating Pivot Tables to Provide Multiple Data Perspectives
- Filtering Data Based on the Results of Another Analysis
- Combining Reports
- Writing Time and Date Formulas
- Adding Simple SQL Expressions to Filters
- Creating Custom Dashboards

Who Should Attend

- CRM On Demand Company Administrators
- Business Analysts
- CRM On Demand Consultants

Prerequisites

- Building Your Own Reports Webinar series and Creating Custom Dashboards Webinar
or
- On-the-job experience with creating basic reports using CRM On Demand Answers

Related Courses

- Oracle CRM On Demand Administration Essentials

Course Objective

This intensive, hands-on course teaches advanced techniques for developing and configuring custom reports and dashboards in Oracle CRM On Demand Answers. It is intended for individuals and consultants with a job role that includes building, modifying, and administering analytics for Oracle CRM On Demand.

Course Summary

In this course, students learn to use advanced features of 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; use advanced formulas and calculated columns; and, build comparative reports using prompts. These skills enable advanced users to build easy-to-use reports and dashboards that meet complex reporting needs.

Hands-On Practice

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.

Example Lab Exercises:

- Use conditional formatting to bring focus to key data
- Configure views that give users the ability to change data perspectives and get just the data they need
- Combine filters to constrain data across different subject areas
- Create formulas to analyze data within a specific time period
- Guide users to reports through linking and drilldown paths
- Create custom dashboards to provide an in-depth view of the business using simple reports

Why Attend this Course?

If you have experience with Oracle CRM On Demand Answers or have taken the prerequisite Webinars and want to learn more about analytics, this course is for you.

Learn More

For further information, please visit our Web site: www.crmondemand.com.

AGENDA

Day 1

Overview

- Course Overview
- Reporting Methodology

Customizing Report Tables

- Customizing Columns
- Formatting data
- Conditional Formatting
- Formatting with Images

Working with Pivot Tables

- Aggregation Rules
- Pivot Table Charts
- Complex Pivot Table Analyses

Using Advanced Layout Views

- Using Column Selectors
- Adding a Legend

Filtering Data in Reports

- Filter Types

Day 2

Filtering Data in Reports (continued)

- Filtering Based on the Results of Another Report
- Creating Complex Filters Across Subject Areas

Filtering Data

- Creating Prompts for User Controlled Filters
- Optimizing for Performance

Formulas

- Calculated Fields with SQL Expressions
- Using SQL Expressions in Advanced Filters
- Complex Queries Including Date and Time Format

Day 3

Formulas (continued)

- Adding Conditional Values Using Case Statements

Linking Reports

- Controlling Drilldown Paths
- Adding Links from Reports to Specific Records (Answers to On Demand)
- Adding Links from Specific Records to Reports (Embedded Analytics)

Custom Dashboards

- Creating Custom Dashboards and Dashboard Prompts