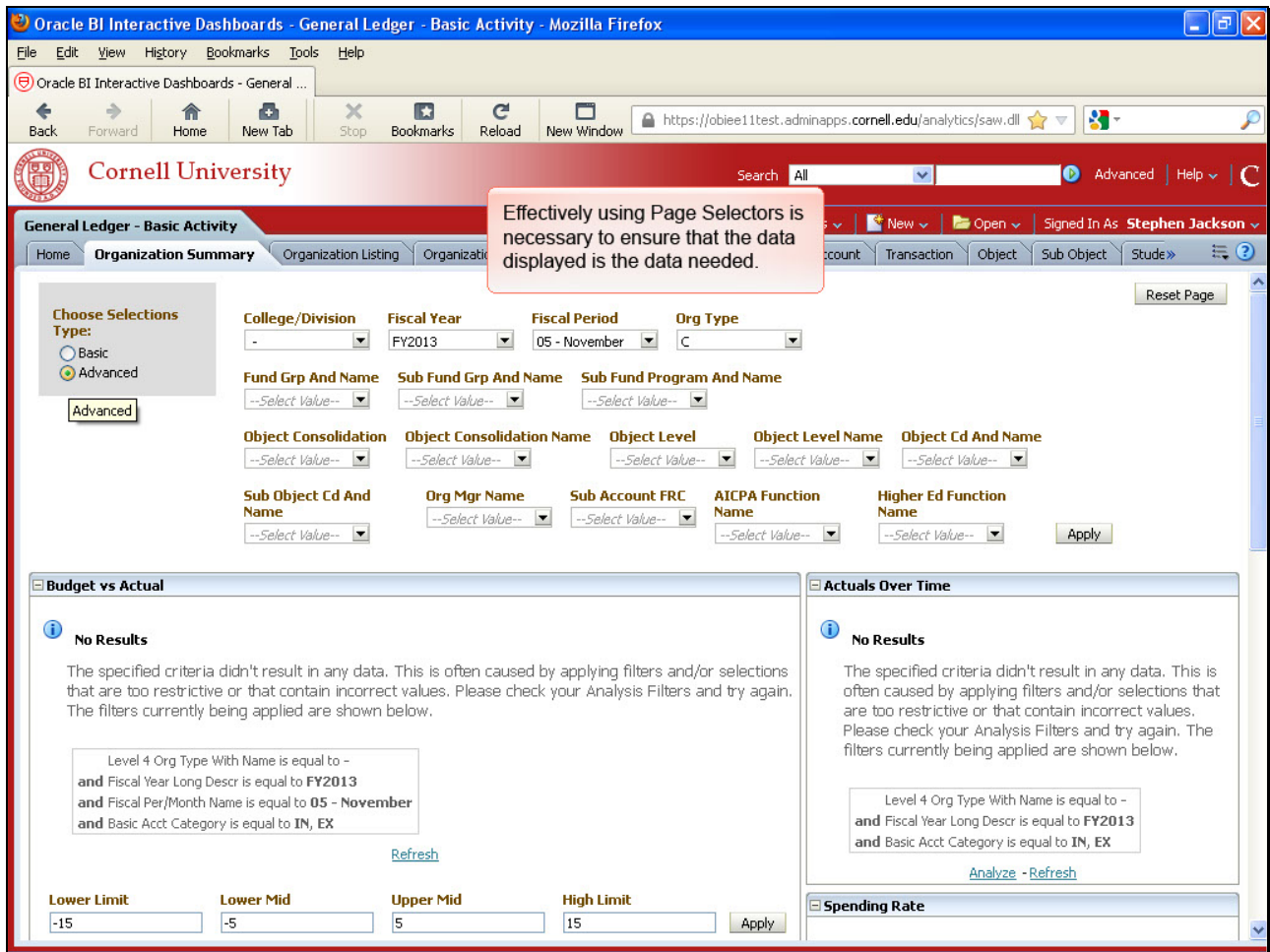


Chapter 4: Using Filters and the Multi-Select Search Function



Effectively using Page Selectors is necessary to ensure that the data displayed is the data needed.

Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Oracle BI Interactive Dashboards - General ...

Back Forward Home New Tab Stop Bookmarks Reload New Window

https://obiee11test.adminapps.cornell.edu/analytics/saw.dll

Cornell University

Search All Advanced Help

Signed In As Stephen Jackson

General Ledger - Basic Activity

Home Organization Summary Organization Listing

Object Sub Object Stude»

Reset Page

Choose Selections Type: Basic Advanced

Advanced

College/Division Fiscal Year Fiscal Period Org Type

Fund Grp And Name

Object Consolidat

Object Level Name Object Cd And Name

Org Mgr Name Sub Account FRC AICPA Function Name Higher Ed Function Name

Apply

In many instances, users will need to change the default selections to ones that are valid for their specific needs.

Page Selectors often use a feature called Multi-Select to allow users to choose multiple values in a selector.

To make a page selection, click the Multi-Select box for the selector.

Budget vs Actual

No Results

The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.

Level 4 Org Type With Name is equal to -
and Fiscal Year Long Descr is equal to **FY2013**
and Fiscal Per/Month Name is equal to **05 - November**
and Basic Acct. Category is equal to **IN, EX**

Refresh

Lower Limit Lower Mid Upper Mid High Limit

-15 -5 5 15 Apply

Actuals Over Time

No Results

The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.

Level 4 Org Type With Name is equal to -
and Fiscal Year Long Descr is equal to **FY2013**
and Basic Acct. Category is equal to **IN, EX**

Analyze - Refresh

Spending Rate

In many instances, users will need to change the default selections to ones that are valid for their specific needs.

Page Selectors often use a feature called Multi-Select to allow users to choose multiple values in a selector.

To make a page selection, click the Multi-Select box for the selector.

Click the down arrow.

Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox

File Edit View History Bookmarks Tools Help

Oracle BI Interactive Dashboards - General ...

Back Forward Home New Tab Stop Bookmarks Reload New Window

https://obiee11test.adminapps.cornell.edu/analytics/saw.dll

Cornell University

Search All Advanced Help

General Ledger - Basic Activity Home Catalog Favorites Dashboards New Open Signed In As Stephen Jackson

Home Organization Summary Organization Listing Organization with Fund Specific Organization with Account Account Transaction Object Sub Object Stude»

Choose Selections Type: Basic Advanced

College/Division

-
- C - Administration
- C - Alumni Affairs and Development
- C - Associations - Cooperative Extension
- C - CALS - College of Ag. & Life Sciences
- C - CE-Continuing Education & SS
- C - College of Architecture Art and Planning
- C - College of Arts and Sciences

Fiscal Year: FY2013 Fiscal Period: 05 - November Org Type: C

Sub Fund Program And Name: --Select Value--

Object Level: --Select Value-- Object Level Name: --Select Value-- Object Cd And Name: --Select Value--

Higher Ed Function Name: --Select Value--

Apply

Reset Page

Budget vs Actual

No Results

The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.

Level 4 Org Type With Name is equal to -
and Fiscal Year Long Descr is equal to **FY2013**
and Fiscal Per/Month Name is equal to **05 - November**
and Basic Acct. Category is equal to **IN, EX**

Refresh

Actuals Over Time

No Results

The specified criteria didn't result in any data. This is often caused by applying filters and/or selections that are too restrictive or that contain incorrect values. Please check your Analysis Filters and try again. The filters currently being applied are shown below.

Level 4 Org Type With Name is equal to -
and Fiscal Year Long Descr is equal to **FY2013**
and Basic Acct. Category is equal to **IN, EX**

Analyze - Refresh

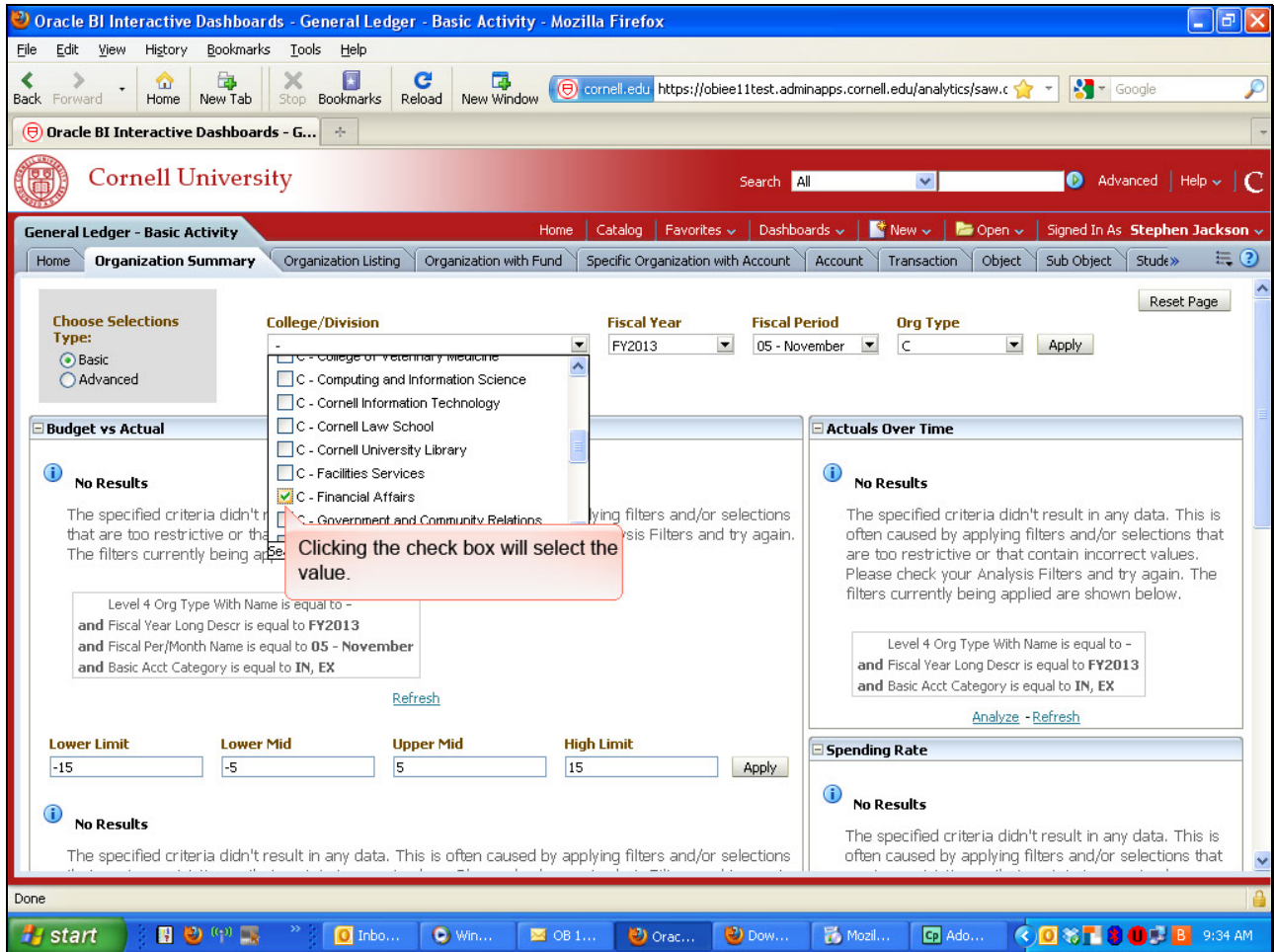
Spending Rate

Lower Limit: -15 Lower Mid: -5 Upper Mid: 5 High Limit: 15

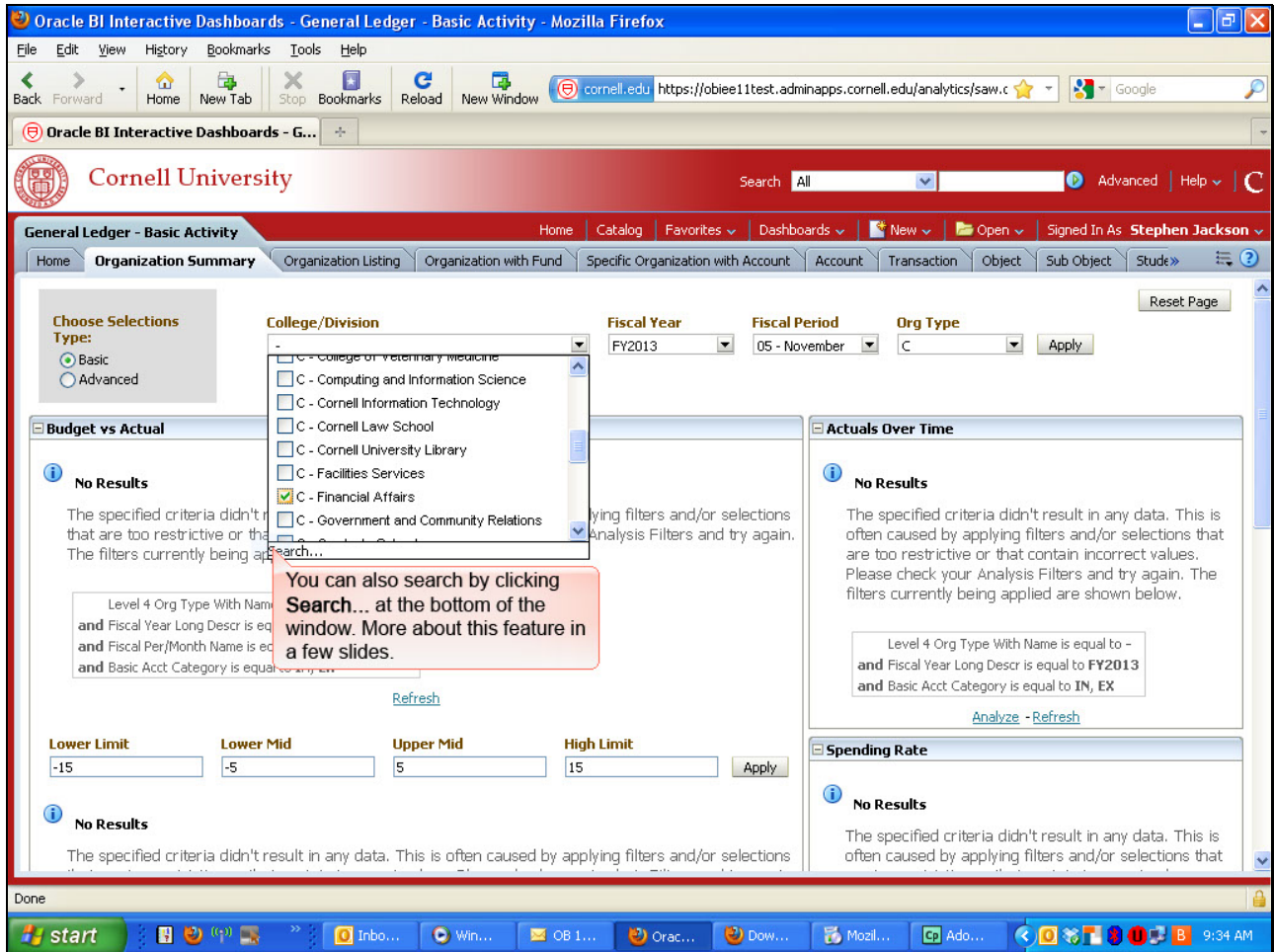
Apply

javascript:void(0)

You can scroll through data and select single or multiple items by clicking the check box.



Clicking the check box will select the value.



You can also search by clicking **Search...** at the bottom of the window. More about this feature in a few slides.

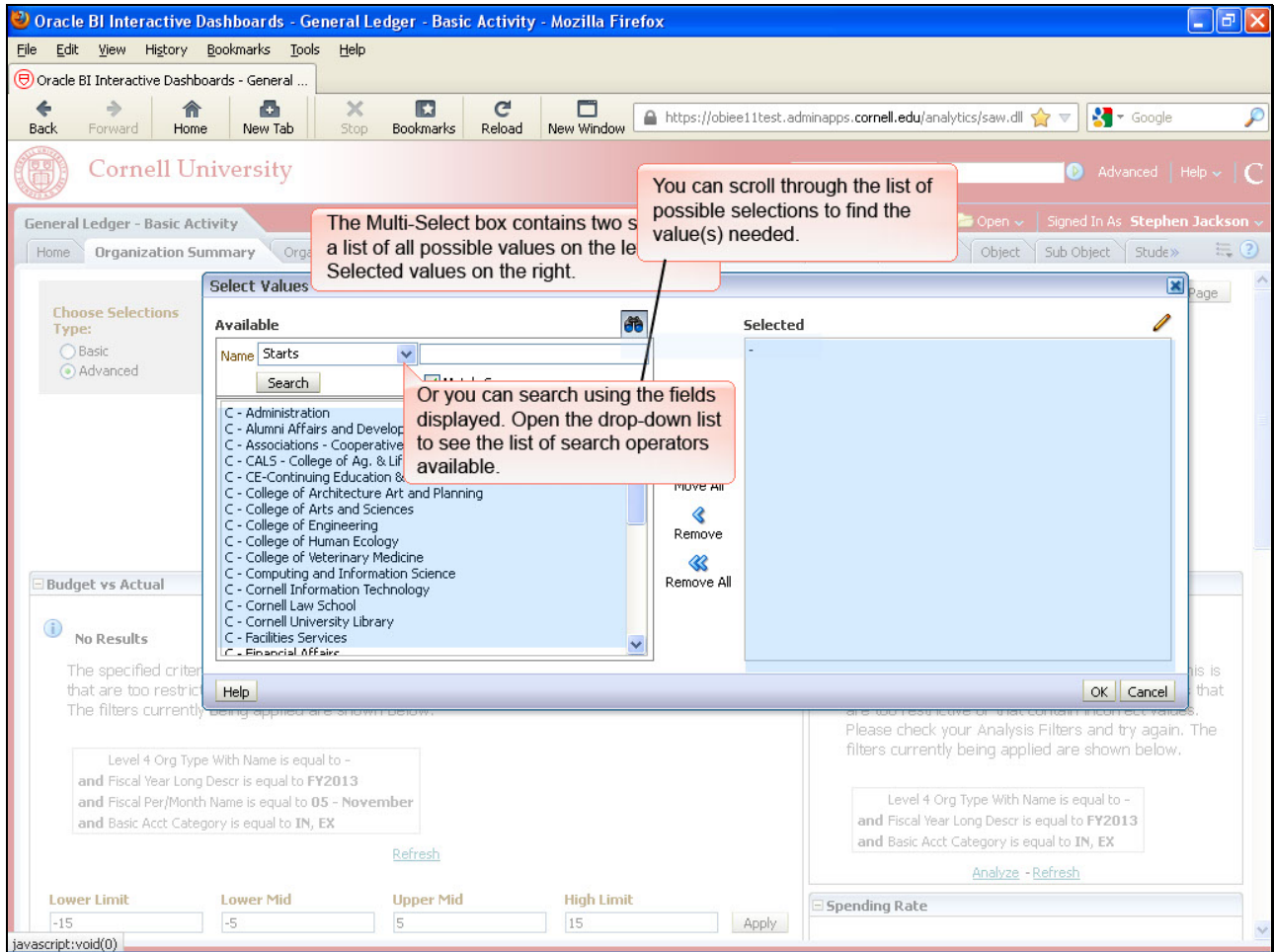
The screenshot shows the Oracle BI Interactive Dashboards interface for General Ledger - Basic Activity. The browser is Mozilla Firefox, and the URL is https://obiee11test.adminapps.cornell.edu/analytics/saw.dll. The page is titled "General Ledger - Basic Activity" and is signed in as Stephen Jackson. The main content area is divided into two sections: "Budget vs Actual" and "Actuals Over". Both sections display a "No Results" message, indicating that the specified criteria did not result in any data. A red callout box with the text "With the filters returned..." points to the filter selection area. Another red callout box with the text "Click Apply" points to the "Apply" button in the "Actuals Over" section. The filter selection area includes dropdown menus for College/Division, Fiscal Year, Fiscal Period, Org Type, Fund Grp And Name, Sub Fund Grp And Name, Sub Fund Program And Name, Object Consolidation, Object Consolidation Name, Object Level, Object Level Name, Object Cd And Name, Sub Object Cd And Name, Org Mgr Name, Sub Account FRC, AICPA Function Name, and Higher Ed Function Name. The "Budget vs Actual" section also includes input fields for Lower Limit, Lower Mid, Upper Mid, and High Limit, along with a "Refresh" button. The "Actuals Over" section includes an "Analyze - Refresh" button. The page footer shows the JavaScript error "javascript:void(0)".

With the filters returned...

Click **Apply**

The screenshot shows the Oracle BI Interactive Dashboards interface for General Ledger - Basic Activity. The browser window is Mozilla Firefox, and the URL is https://obiee11test.adminapps.cornell.edu/analytics/saw.c. The page title is Oracle BI Interactive Dashboards - G... and the user is signed in as Stephen Jackson. The dashboard is titled General Ledger - Basic Activity and has a navigation bar with tabs: Home, Organization Summary, Organization Listing, Organization with Fund, Specific Organization with Account, Account, Transaction, Object, Sub Object, and Study. The Organization Summary tab is active. The dashboard includes a 'Choose Selections' section with 'Basic' selected. There are filters for 'College/Division', 'Fiscal Year' (FY2013), 'Fiscal Period' (05 - November), and 'Org Type' (C). The 'College/Division' dropdown is open, showing a list of departments. A red box highlights the 'Search...' button at the bottom of the dropdown list, with a callout box containing the text: 'If you want to search for items, click Search... at the bottom of the window.' The dashboard also displays 'Budget vs Actual', 'Actuals Over Time', and 'Spending Rate' sections, all showing 'No Results'.

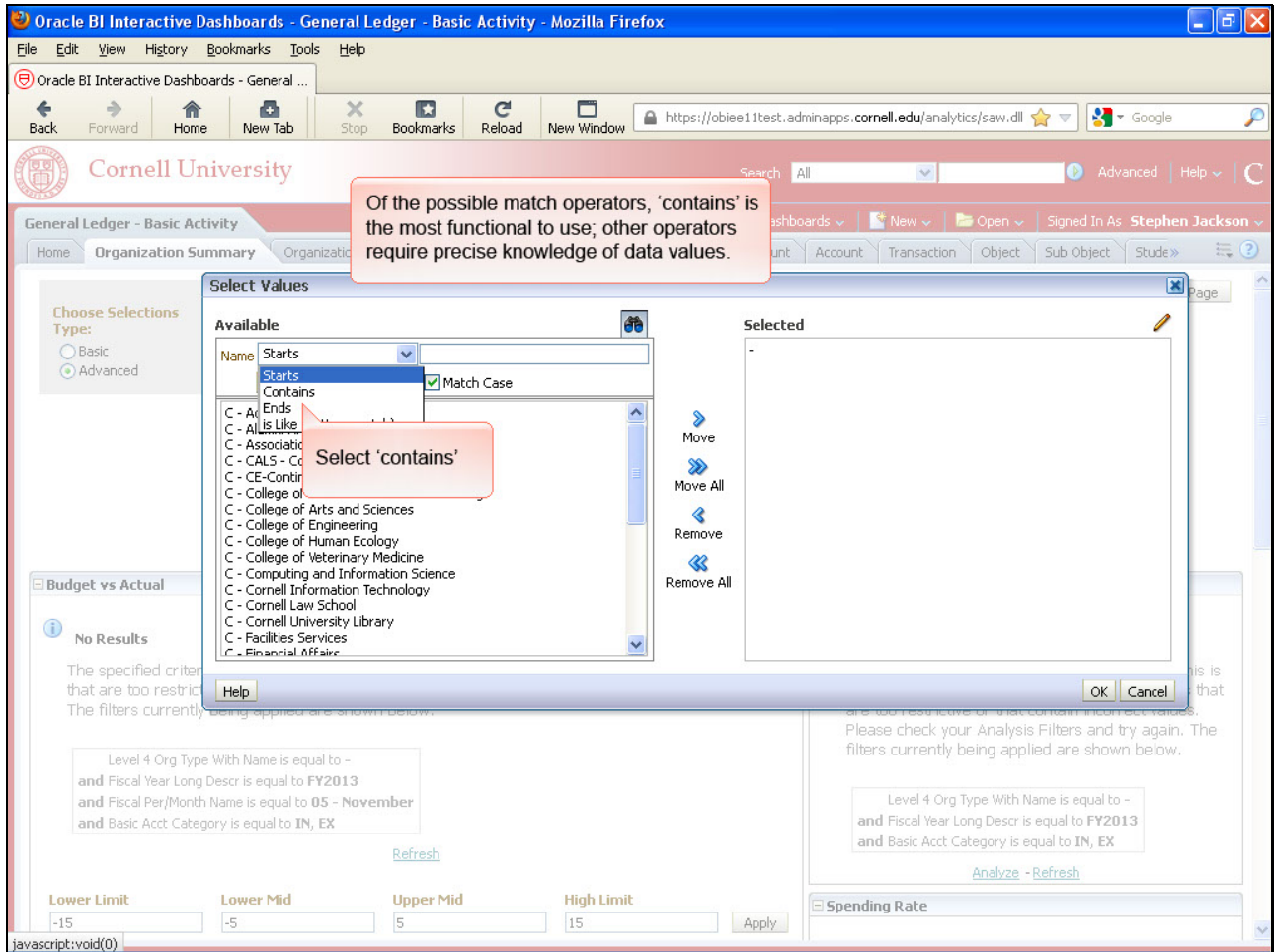
If you want to search for items, click **Search...** at the bottom of the window.



The Multi-Select box contains two sections: a list of all possible values on the left and Selected values on the right.

You can scroll through the list of possible selections to find the value(s) needed.

Or you can search using the fields displayed. Open the drop-down list to see the list of search operators available.



Of the possible match operators, 'contains' is the most functional to use; other operators require precise knowledge of data values.

Select 'contains'

The screenshot shows a web browser window titled "Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox". The address bar shows the URL "https://obiee11test.adminapps.cornell.edu/analytics/saw.dll". The page header includes the Cornell University logo and a search bar. The main navigation bar shows "General Ledger - Basic Activity" and various menu options like "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", "Signed In As Stephen Jackson", and "Help".

The "Select Values" dialog box is open, showing a search filter "Name Contains" and a list of organization names. A red callout box points to the search filter with the text: "Enter a portion of the name you are searching for; in this case, part of a College or Division name." The list of organization names includes:

- C - Administration
- C - Alumni Affairs and Development
- C - Associations - Cooperative Extension
- C - CALS - College of Ag. & Life Sciences
- C - CE-Continuing Education & SS
- C - College of Architecture Art and Planning
- C - College of Arts and Sciences
- C - College of Engineering
- C - College of Human Ecology
- C - College of Veterinary Medicine
- C - Computing and Information Science
- C - Cornell Information Technology
- C - Cornell Law School
- C - Cornell University Library
- C - Facilities Services
- C - Financial Affairs

The dialog box also has "Available" and "Selected" sections, a "Search" button, a "Match Case" checkbox, and "OK" and "Cancel" buttons. Below the dialog box, there are sections for "Budget vs Actual" and "Spending Rate" with various filters and input fields.

Enter a portion of the name you are searching for; in this case, part of a College or Division name.

The screenshot shows the Oracle BI Interactive Dashboards interface. A 'Select Values' dialog box is open, displaying a search for 'finan' in the 'Name' field. The 'Match Case' checkbox is checked. A red callout box with the text 'The match search is case sensitive.' points to the 'Match Case' checkbox. The 'Available' list contains various organizational units, and the 'Selected' list is empty. The background shows the 'General Ledger - Basic Activity' dashboard with a 'No Results' message and filter criteria: 'Level 4 Org Type With Name is equal to - and Fiscal Year Long Descr is equal to FY2013 and Fiscal Per/Month Name is equal to 05 - November and Basic Acct. Category is equal to IN, EX'. There are 'Refresh' and 'Analyze - Refresh' buttons. At the bottom, there are input fields for 'Lower Limit', 'Lower Mid', 'Upper Mid', and 'High Limit' with values -15, -5, 5, and 15 respectively, and an 'Apply' button.

The match search is case sensitive.

The screenshot shows a web browser window titled "Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox". The address bar shows the URL "https://obiee11test.adminapps.cornell.edu/analytics/saw.dll". The page header includes the Cornell University logo and a search bar. The main content area is titled "General Ledger - Basic Activity" and contains a "Select Values" dialog box. The dialog box has two panes: "Available" and "Selected". In the "Available" pane, the search criteria is "Name Contains finan" and the "Match Case" checkbox is checked. A red callout box points to the "Match Case" checkbox with the text "To make this field non case sensitive click the Match Case check box." Below the dialog box, there are several filter criteria and a "Refresh" button. At the bottom, there are input fields for "Lower Limit", "Lower Mid", "Upper Mid", and "High Limit", along with an "Apply" button.

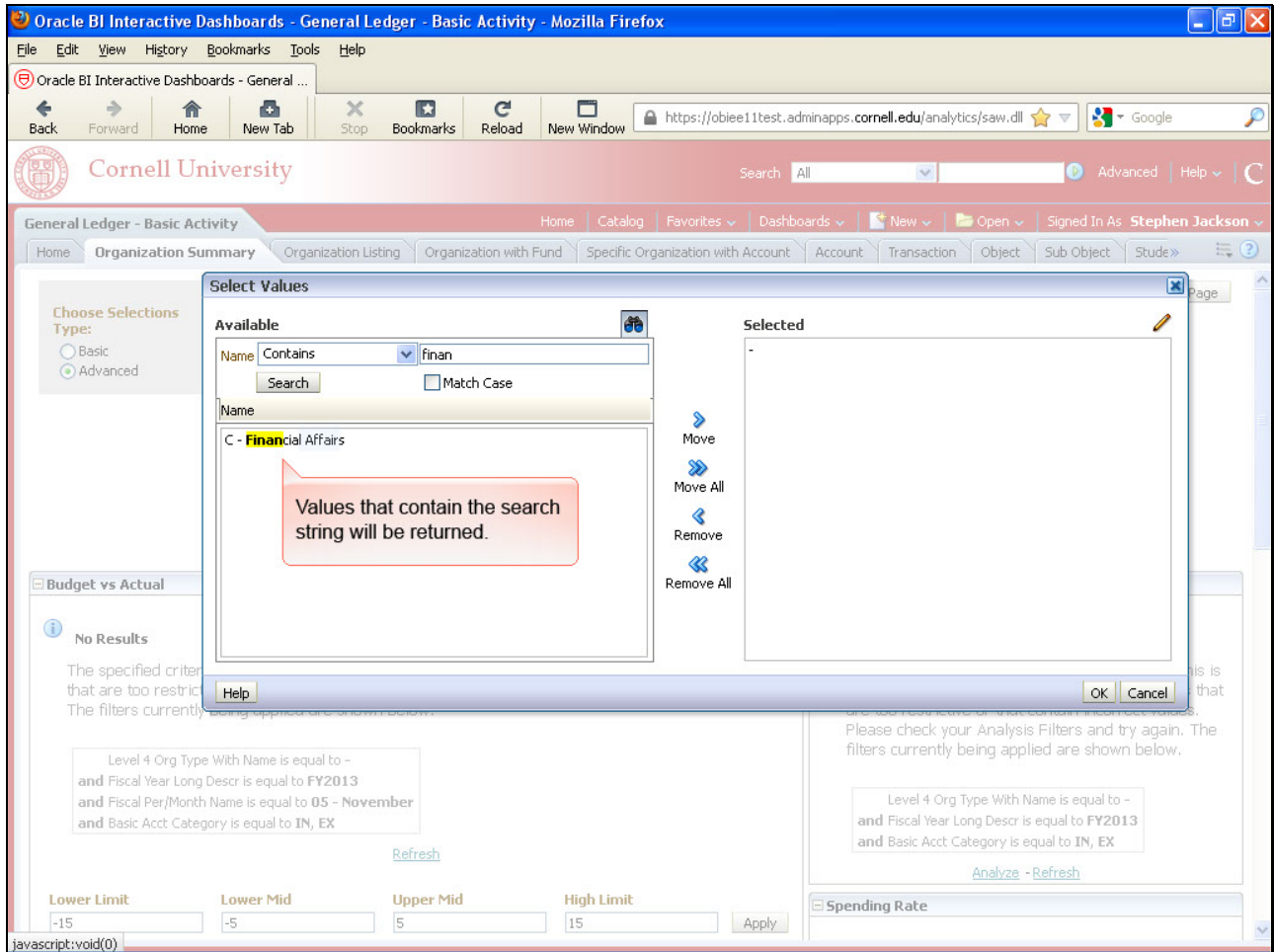
To make this field non case sensitive click the **Match Case** check box.

The screenshot shows a web browser window titled "Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox". The address bar shows the URL "https://obiee11test.adminapps.cornell.edu/analytics/saw.dll". The page header includes the Cornell University logo and a search bar. The main navigation bar shows "General Ledger - Basic Activity" and various tabs like "Home", "Catalog", "Favorites", "Dashboards", "New", "Open", "Signed In As Stephen Jackson", and "Help".

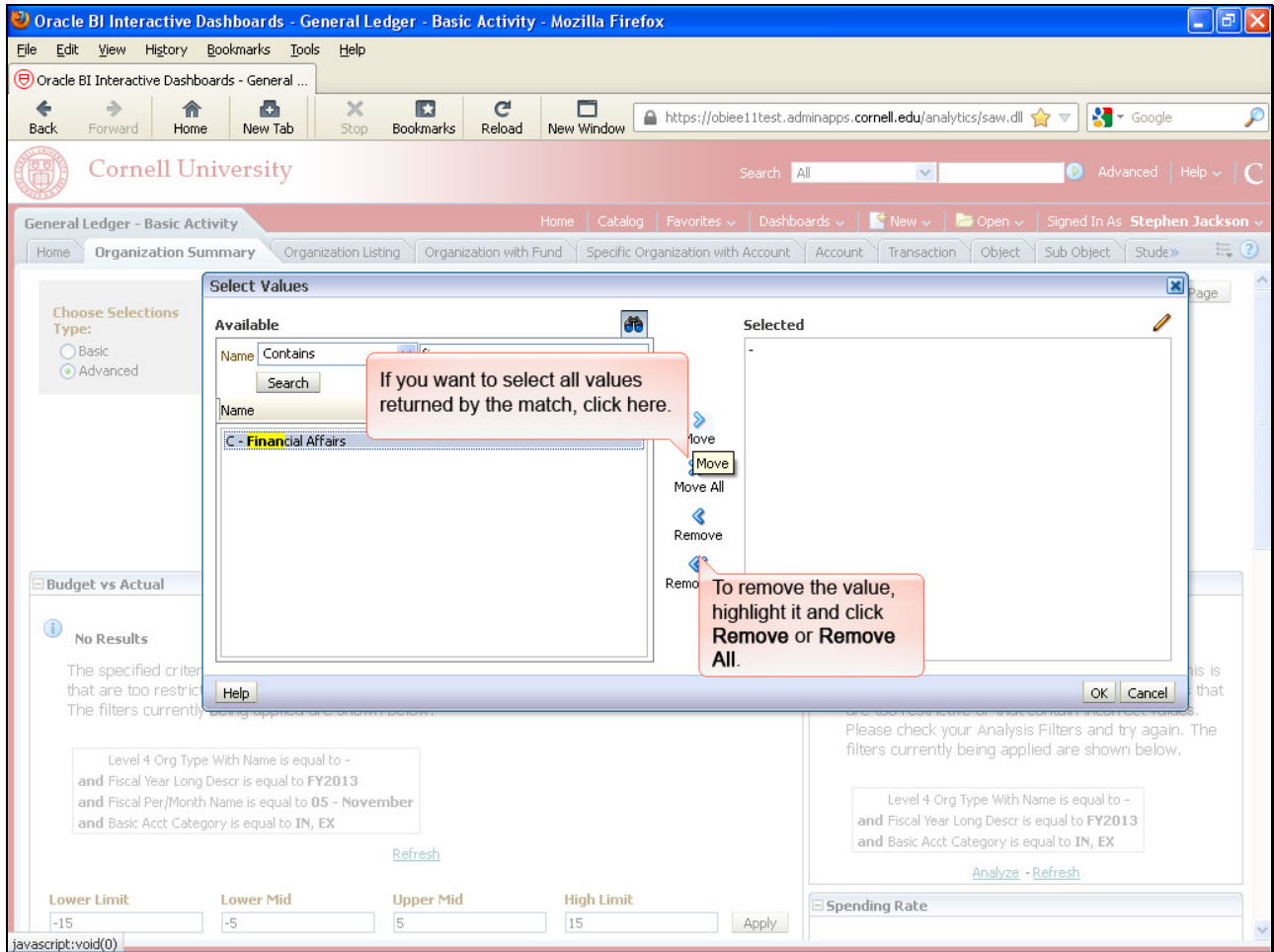
The "Select Values" dialog box is open, showing a search interface. The "Available" list contains various organizational units, and the "Selected" list is empty. A red callout box with the text "Click the Search button." points to the "Search" button in the "Available" list. The "Name" field is set to "Contains" and "finan". The "Match Case" checkbox is unchecked. The "Help" button is visible at the bottom of the dialog.

Below the dialog box, the "Budget vs Actual" section shows "No Results" and a message: "The specified criteria that are too restrictive. The filters currently being applied are shown below." The filters listed are: "Level 4 Org Type With Name is equal to -", "and Fiscal Year Long Descr is equal to FY2013", "and Fiscal Per/Month Name is equal to 05 - November", and "and Basic Acct. Category is equal to IN, EX". There are "Refresh" and "Analyze - Refresh" buttons. At the bottom, there are input fields for "Lower Limit", "Lower Mid", "Upper Mid", and "High Limit", with values -15, -5, 5, and 15 respectively, and an "Apply" button.

Click the **Search** button.

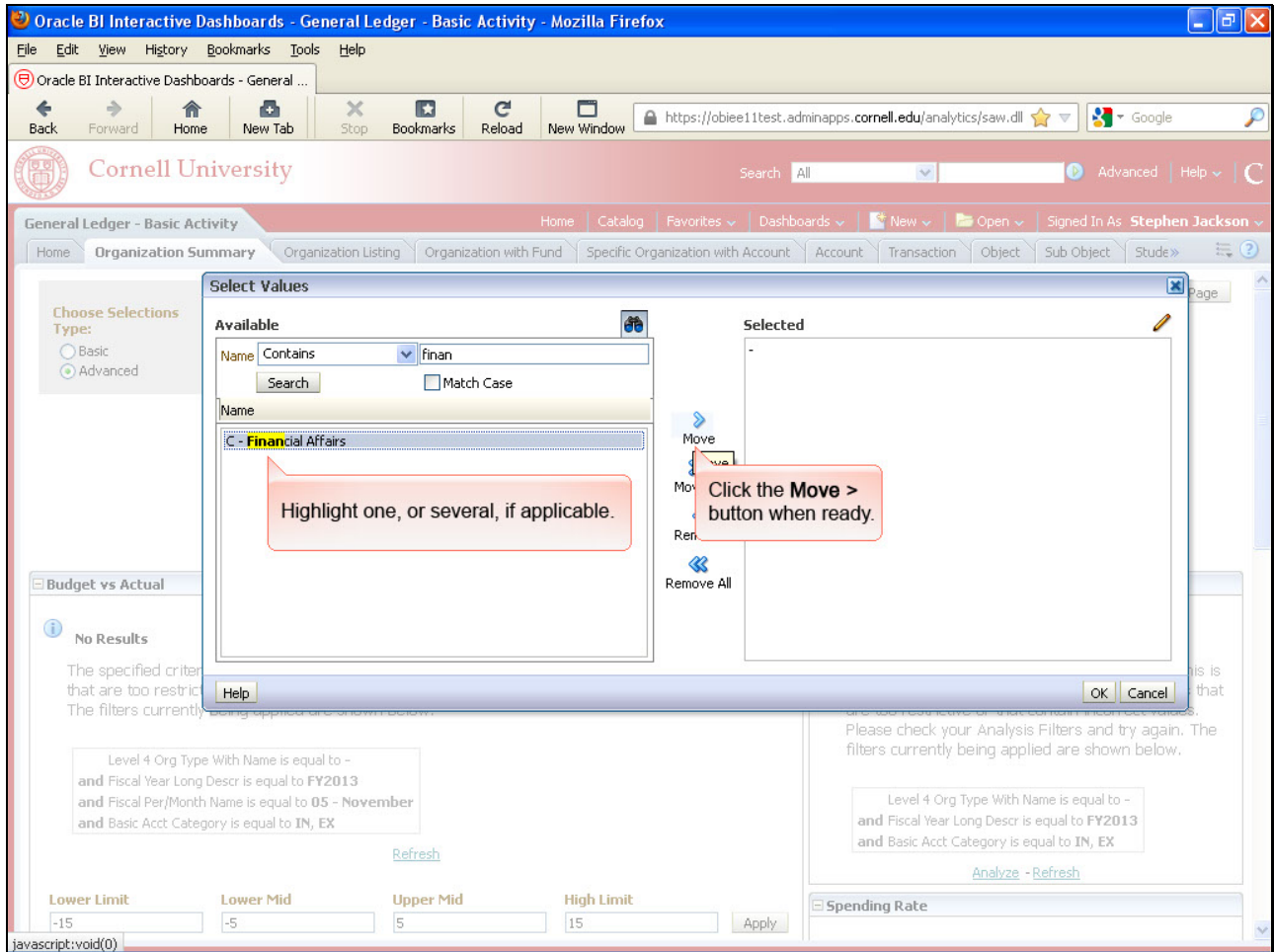


Values that contain the search string will be returned.



If you want to select all values returned by the match, click here.

To remove the value, highlight it and click **Remove** or **Remove All**.



Highlight one, or several, if applicable.

Click the **Move >** button when ready.

The screenshot shows a web browser window with the Oracle BI Interactive Dashboards interface. A 'Select Values' dialog box is open, allowing the user to filter data. The 'Available' section is empty, and 'C - Financial Affairs' is listed in the 'Selected' section. A red callout box highlights the 'OK' button with the text: "When selections for this prompt are final, click OK."

Budget vs Actual

	Lower Limit	Lower Mid	Upper Mid	High Limit	Apply
	-15	-5	5	15	

Select a View: To Date

	To Date Income Budget	To Date Income	To Date In Var \$	To Date In Var %	To Date Expense Budget	To Date Expense	To Date Ex Var \$	To Date Ex Var %	Options
College/Division									
C - Financial Affairs	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	
Grand Total	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	

Bar chart showing To Date Expense values up to 40,000K.

When all selections for this prompt are final, click OK.

General Ledger - Basic Activity

Choose Selections Type: Basic Advanced

College/Division: C - Financial Affa | Fiscal Year: FY2013 | Fiscal Period: 05 - November | Org Type: C

Fund Grp And Name: --Select Value-- | Sub Fund Grp And Name: --Select Value-- | Sub Fund Program And Name: --Select Value--

Object Consolidation: --Select Value-- | Object Consolidation Name: --Select Value-- | Object Level: --Select Value-- | Object Level Name: --Select Value-- | Object Cd And Name: --Select Value--

Sub Object Cd And Name: --Select Value-- | Org Mgr Name: --Select Value-- | Sub Account FRC: --Select Value-- | AICPA Function Name: --Select Value-- | Higher Ed Function Name: --Select Value--

Budget vs Actual

Lower Limit: -15 | High Limit: 15 | Apply

Select a View: To Date

	To Date Income Budget	To Date Income	To Date In Var \$	To Date In Var %	To Date Expense Budget	To Date Expense	To Date Ex Var \$	To Date Ex Var %	Options
College/Division									
C - Financial Affairs	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	
Grand Total	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	

Actuals Over Time

Select a View: To Date

To Date Expense

45,000K
40,000K
35,000K
30,000K
25,000K
20,000K
15,000K
10,000K

Page Selectors are almost always constrained against one another.

This means that the list of options available in a selector is limited by the selection choices already made.

In this example, since the Division of Financial Affairs has been selected, the choices available in the Org Mgr Name selector will only include Org Managers in that unit.

Oracle BI Interactive Dashboards - General Ledger - Basic Activity - Mozilla Firefox

Oracle BI Interactive Dashboards - General ...

https://obiee11test.adminapps.cornell.edu/analytics/saw.dll

Cornell University

General Ledger - Basic Activity

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As Stephen Jackson

Home | Organization Summary | Organization Listing | Organization with Fund | Specific Organization with Account | Account | Transaction | Object | Sub Object | Stude»

Choose Selections Type: Basic (selected), Advanced

College/Division: C - Financial Affa | Fiscal Year: FY2013 | Fiscal Period: 05 - November | Org Type: C

Fund Grp And Name: --Select Value--

Object Consolidation: --Select Value--

Object Level Name: --Select Value-- | Object Cd And Name: --Select Value--

Sub Object Cd And Name: --Select Value--

Org Mgr Name: --Select Value-- (Yager, Robin Maria)

Sub Account FRC: --Select Value-- | AICPA Function Name: --Select Value-- | Higher Ed Function Name: --Select Value--

Apply

Budget vs Actual

*Enter values below to set color thresholds

Lower Limit: -15 | Lower Mid: -5 | Apply

	To Date Income Budget	To Date Income	To Date In Var \$	To Date In Var %	To Date Expense Budget	To Date Expense	To Date Ex Var \$	To Date Ex Var %	Options
College/Division									
C - Financial Affairs	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	
Grand Total	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	

Actuals Over Time

Select a View: To Date

To Date Expense

45,000K
40,000K
35,000K
30,000K
25,000K
20,000K
15,000K
10,000K

Callout 1: This feature prevents choosing a combination of page selectors that will fail to return data.

Callout 2: It also reduces the volume of selection options a user must consider when additional selections are being evaluated.

It also reduces the volume of selection options a user must consider when additional selections are being evaluated.

This feature prevents choosing a combination of page selectors that will fail to return data.

General Ledger - Basic Activity

Home | Catalog | Favorites | Dashboards | New | Open | Signed In As **Stephen Jackson**

Home | Organization Summary | Organization Listing | Organization with Fund | Specific Organization with Account | Account | Transaction | Object | Sub Object | Stude»

Choose Selections
Type:
 Basic
 Advanced

College/Division: C - Financial Affa | Fiscal Year: FY2013 | Fiscal Period: 05 - November | Org Type: C

Fund Grp And Name: --Select Value-- | Sub Fund Grp And Name: --Select Value-- | Sub Fund Program And Name: --Select Value--

Object Consolidation: --Select Value-- | Object Consolidation Name: --Select Value-- | Object Level: --Select Value-- | Object Level Name: --Select Value-- | Object Cd And Name: --Select Value--

Sub Object Cd And Name: --Select Value-- | Org Mgr Name: --Select Value-- | Sub Account FRC: --Select Value-- | AICPA Function Name: --Select Value-- | Higher Ed Function Name: --Select Value--

Budget vs Actual

*Enter values below to adjust color thresholds

Lower Limit: -15 | Lower Mid: -5 | Upper Mid: 5 | High Limit: 15 | Apply

Select a View: To Date

	To Date Income Budget	To Date Income	To Date In Var \$	To Date In Var %	To Date Expense Budget	To Date Expense	To Date Ex Var \$	To Date Ex Var %	Options
College/Division									
C - Financial Affairs	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	
Grand Total	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	

Select a View: To Date Expense

Bar Chart: To Date Expense (0 to 45,000K)

Apply

Click the **Apply** button to search.

Click the **Apply** button to search.

Budget vs Actual

*Enter values below to adjust color thresholds

Lower Limit: -15 Lower Mid: -5 Upper Mid: 5 High Limit: 15

Select a View:

	To Date Income Budget	To Date Income	To Date In Var \$	To Date In Var %	To Date Expense Budget	To Date Expense	To Date Ex Var \$	To Date Ex Var %	Options
College/Division									
C - Financial Affairs	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	<input type="button" value="v"/>
Grand Total	42,137,300	27,298,407	(14,838,893)	(35.2%)	42,137,300	16,830,733	25,306,567	60.1%	<input type="button" value="v"/>

Legend: < -15% (red), -15% to -5% (orange), -5% to 5% (yellow), 5% to 15% (light green), > 15% (dark green)

Level 4 Org Type With Name is equal to C - Financial Affairs
 and Fiscal Year Long Descr is equal to FY2013
 and Fiscal Per/Month Name is equal to 05 - November
 and Basic Acct Category is equal to IN, EX

Results.