

# Filtering Requests in Oracle BI Answers

mailto : [aloo\\_a2@yahoo.com](mailto:aloo_a2@yahoo.com) for all Hyperion video tutorial/Training/Certification/Material

## Filtering Requests

A filter is used to limit the results that appear when an Oracle BI request is run. Together with the columns selected for a request, a filter determines what your results will contain. Based on the filter criteria, Oracle BI Answers shows *only those results that match the filter criteria*. Filters are applied on a column-level basis. A filter can also combine other filters to further constrain the results of a request. Another kind of filter, called a *dashboard prompt*, can apply to all items in a dashboard.

Sample Sales

Columns

- Dimensions -----
- D0 Time
  - D01 More Time Objects
  - D02 Time Facts
    - T00 Calendar Date
    - T01 Per Name Week
    - T02 Per Name Month
    - T03 Per Name Qtr
    - T04 Per Name Half
    - T05 Per Name Year
- D1 Customer
- D2 Market
- D3 Order
- D4 Product
- D5 Employee
- Facts -----
- F1 Revenue
  - 11 Time Series
  - 12 Variations
  - 13 Dimension Total
  - 14 Other Measures
    - 1-01 Revenue (Sum All)
- F2 Units
- F3 Bookings
- F4 Inventory
- Filters
  - Sample Sales



Columns

Click on column names in the selection pane to add them to the request. Once added, d ?

D4 Product	D2 Market	D01 More Time Objects	F1 Revenue
P01 Product ↓↑	M01 Market ↓↑	T15 Day Of Year ↓↑	1-01 Revenue (Sum All) ↓↑
⏪ ⏩ ⏴ ⏵	⏪ ⏩ ⏴ ⏵	⏪ ⏩ ⏴ ⏵	⏪ ⏩ ⏴ ⏵

Display Results Remove Add Filter

Filters

Add filters to the request criteria by holding down the CTRL key and clicking on column n name in the selection pane. ?

Combine with Similar Request

## A column filter consists of the following elements:

- 1) A column to filter, such as Order Quantity.
- 2) A value to use when applying the filter, such as 10.

Advanced users can include SQL expressions, session variables, repository variables (defined in the Oracle BI repository), and presentation variables to define or limit the value).

- 3) An operator that determines how the value is applied, such as Less Than.

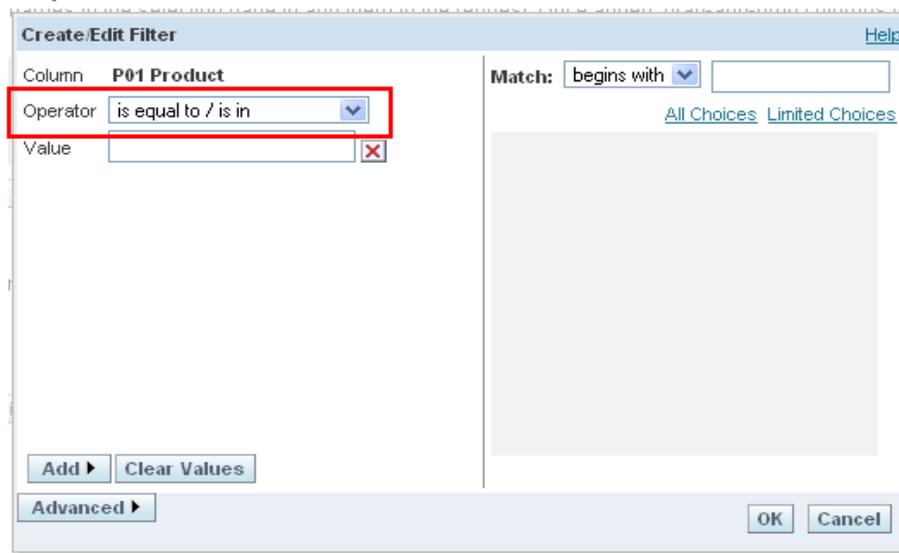
- It can be combined with other column filters from the same subject area to further constrain the results of a request.
- Filters can be grouped (a capability called parenthetical filtering) to create complex filters without requiring you to know SQL.
- Its value can be constrained by the results of a previously-saved request from the same subject area.

## Creating a Column Filter in Oracle BI Answers

1. Click the Criteria tab, and then click the Filter button for the column that you want to include in the filter.



2. At the Create/Edit Filter dialog box, choose an operator from the Operator drop-down list.



3. To specify a value, type it into the Value box or select a value from the right column.

The screenshot shows a dialog box titled "Create/Edit Filter" with a "Help" link in the top right corner. The "Column" is set to "P01 Product". The "Operator" is set to "is equal to / is in". The "Value" field is empty and highlighted with a red rectangle. To the right, the "Match" dropdown is set to "begins with". Below the "Match" dropdown are two links: "All Choices" and "Limited Choices". At the bottom left, there are buttons for "Add" and "Clear Values". At the bottom center, there is a button for "Advanced". At the bottom right, there are buttons for "OK" and "Cancel".

## Creating a Column Filter in Oracle BI Answers

1. Click the Criteria tab, and then click the Filter button for the column that you want to include in the filter.



2. At the  
Operator

A screenshot of the 'Create/Edit Filter' dialog box. The 'Column' field is set to 'P01 Product'. The 'Operator' dropdown is set to 'is equal to / is in'. The 'Value' field is empty. The 'Match' dropdown is set to 'begins with'. There are links for 'All Choices' and 'Limited Choices'. At the bottom, there are buttons for 'Add', 'Clear Values', 'Advanced', 'OK', and 'Cancel'.

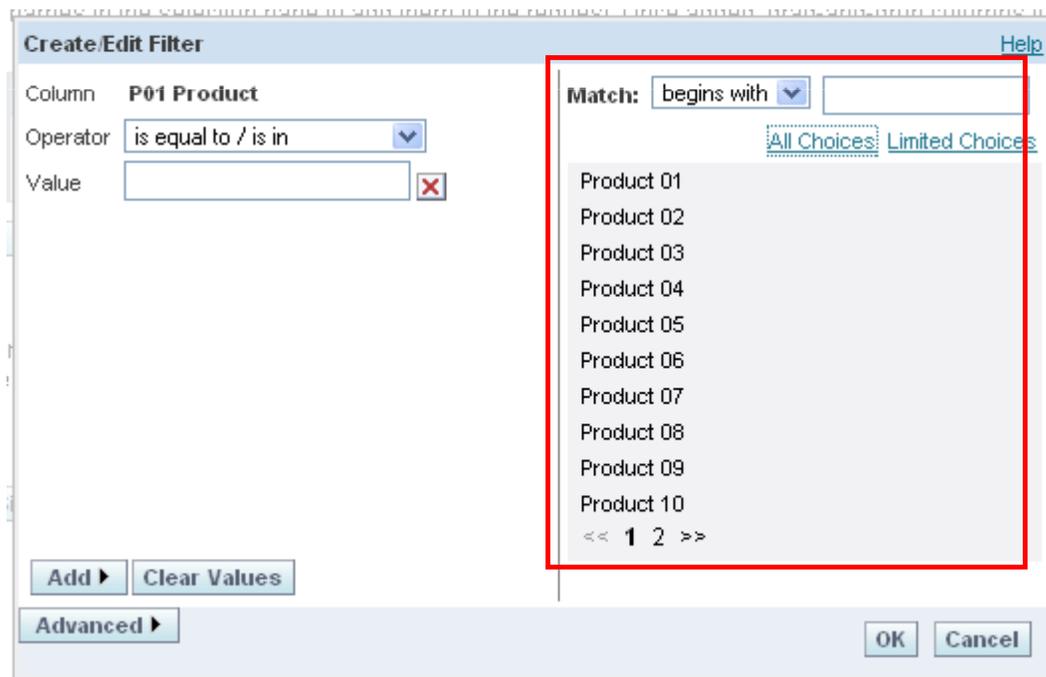
an operator from the

requests, c

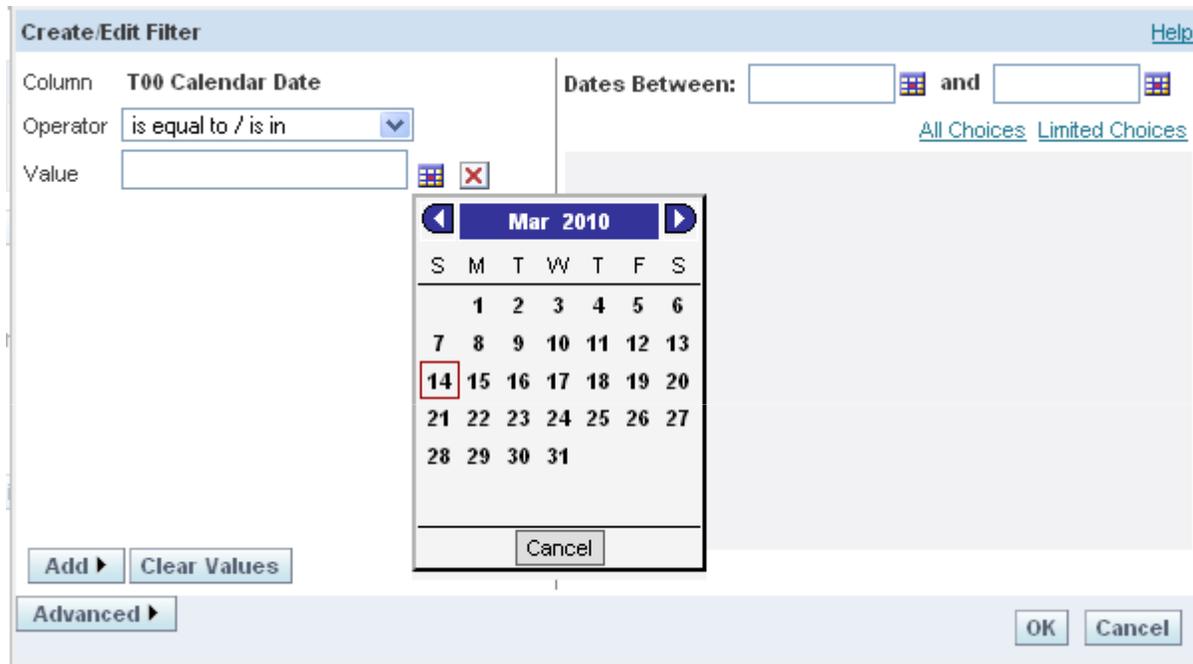
the subj

4 Use the paging controls to navigate the choices when there are many choices for the column:

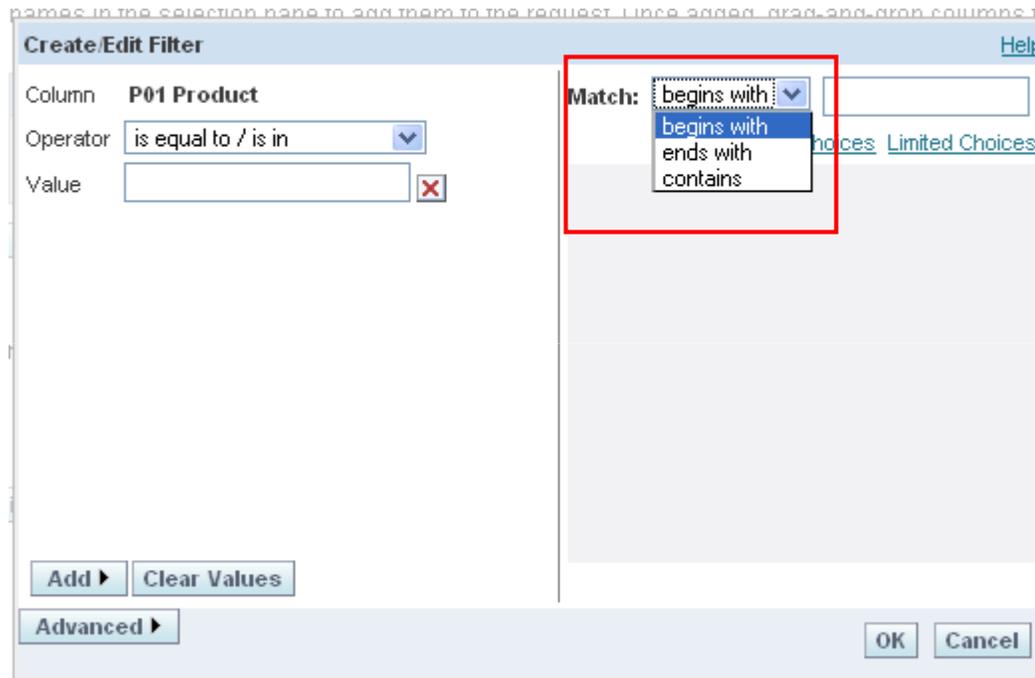
- Click on a specific page number to navigate to that page.
- Click the double right-arrow paging button ( >> ) to advance to the next page, or the double left-arrow paging button ( << ) to go back to the previous page.
- Click triple right-arrow paging button ( >>> ) to advance to the last page, or the triple left arrow paging button ( <<< ) to go back to the first page.



5 Use the calendar buttons to specify the date range for columns that contain dates.

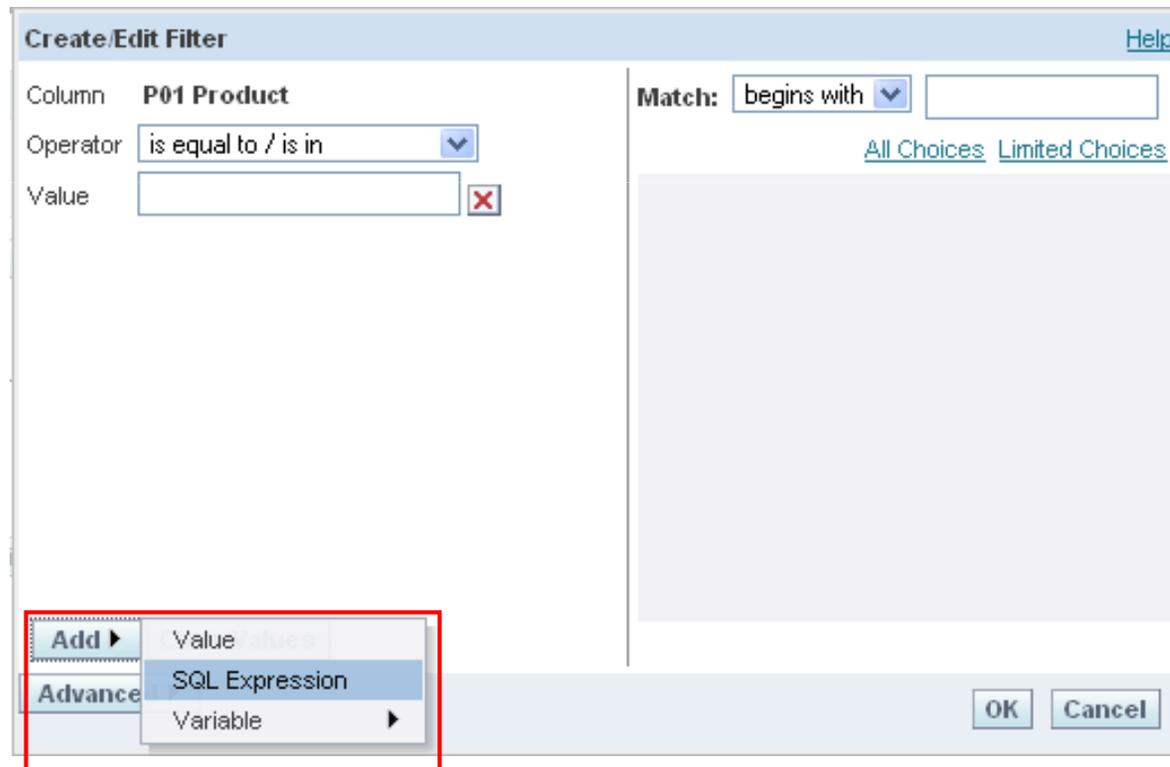


- 6 Use the Match box to limit the list of values to appear in the All Choices or Limited Choices list for columns that contain text or numbers.



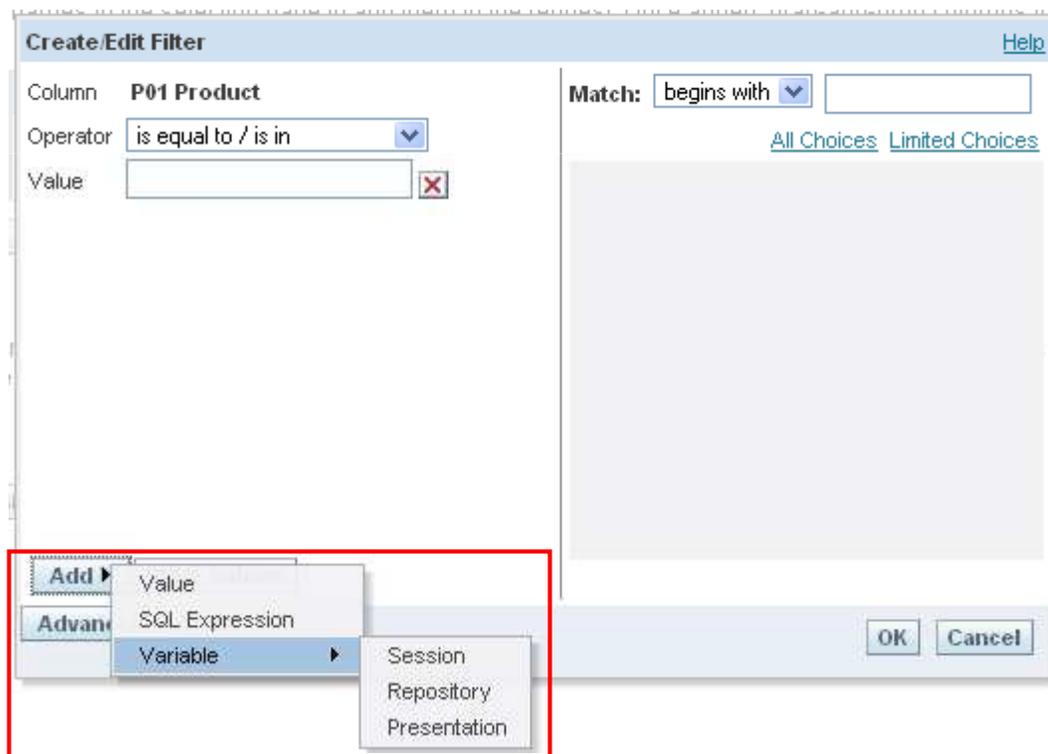
## 7 To add an SQL expression or a system variable (defined in the Oracle BI repository), perform the following actions:

- a Click the Add button and choose the appropriate option. The label on the Value box changes to reflect your selection.
- b Type the SQL expression or system variable name into the box.



## 8 To add a presentation variable, perform the following actions:

- a Click the Add button, choose Variable, and then the Presentation option. A Presentation Variable field and a Default field appears.
- b Type the presentation variable, using correct syntax.
- c Type a default value (Optional) to be used if no value is returned by the presentation variable.



10 To have this filter constrained by the value of a column from the same subject area in another request, click the Advanced button and choose the following option:

**Create/Edit Filter** [Help](#)

Column: **P01 Product**

Operator: is equal to / is in

Value:

Match: begins with

[All Choices](#) [Limited Choices](#)

**Advanced**

**Filter on Saved Request** [Help](#)

Column: **D4 Product.P01 Product**

Relationship: is equal to any

Saved Request:

Use values in Column: any

11 To convert the filter to SQL, click the Advanced button and choose the following option: Convert this filter to SQL

**Create/Edit Filter** [Help](#)

Column: **P01 Product**

Operator: is equal to / is in

Value:

Match: begins with

[All Choices](#) [Limited Choices](#)

**Advanced** ▾

- Filter based on results of another request
- Convert this filter to SQL**

**Advanced SQL Filter** [Help](#)

This page allows you to enter a custom where clause using SQL syntax. (e.g. Sales Facts.Dollars < 100) After entering the SQL, press **OK**.

"D4 Product"."P01 Product" in (Select max(sales) from D1.Product where D4.Product = 'A Dream of Jijene')

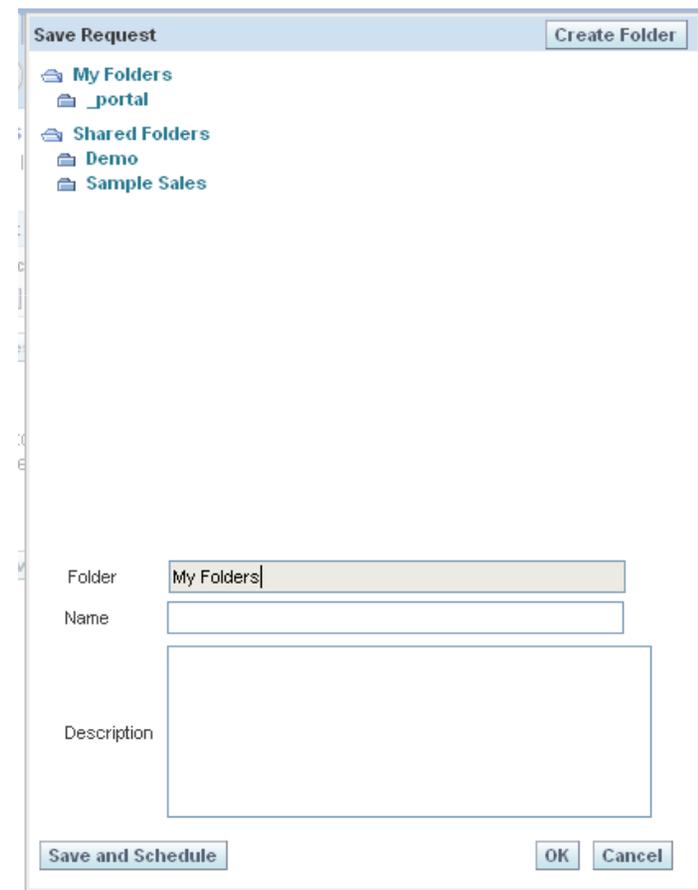
12 When you are finished, click OK.

## Saving a Column Filter in Oracle BI Answers

You can save a filter as part of a request or for reuse in other requests. If a filter is for a specific request, and you save the request, the filter is saved as part of the request and will be applied every time the request runs. You can also save the filter explicitly so it can be used in other requests.

### To save a column filter as part of an Oracle BI request

- 1 At the Criteria tab in Oracle BI Answers, click the Save Request button.
- 2 At the Choose Folder dialog box, choose the location in which to save the request.
- 3 For more information about saving requests,



## To save a column filter for use in other Oracle BI requests

1 In the Filters area on the Criteria tab, click the Save Filter button for the filter you want to save.

2 At the Choose Folder dialog box, choose a folder in which to save the filter:

- To save the filter for your personal use, click My Filters.
- To save the filter for use by others, click Shared Filters.

The screenshot shows the Oracle BI Answers interface. The left sidebar displays a tree view for 'Sample Sales' with various dimensions and facts. The main area is divided into 'Columns' and 'Filters' sections. The 'Columns' section shows a table of selected columns: 'D4 Product' (P01 Product), 'D2 Market' (M01 Market), 'D01 More Time Objects' (T15 Day Of Year), 'F1 Revenue' (1-01 Revenue (Sum All)), and 'D0 Time' (T00 Calendar Date). The 'Filters' section, highlighted with a red box, shows a filter: 'P01 Product is equal to / is in Product 01'. Below the filter is a 'Save Filter...' button. The interface also includes tabs for 'Criteria', 'Results', 'Prompts', and 'Advanced', and buttons for 'Display Results' and 'Remove All'.



3 To specify a subfolder, perform one of the following actions:

- Navigate to it.
- Click Create Folder to create a new subfolder.
- Type the path in the Folder box.

4 Type a name for the filter.

The name will appear in the selection pane.

5 (Optional) Type a description for the filter.

Descriptions are displayed when Oracle BI administrators use the Catalog Manager.

6 Click OK.

When you click the Refresh Display link in the selection pane, the filter is listed under the Filters folder in either My Filters or in a shared filters folder.

## Applying a Saved Column Filter to an Oracle BI Request

1 At the Criteria tab in Oracle BI Answers, display a request to which you want to add a saved column filter.

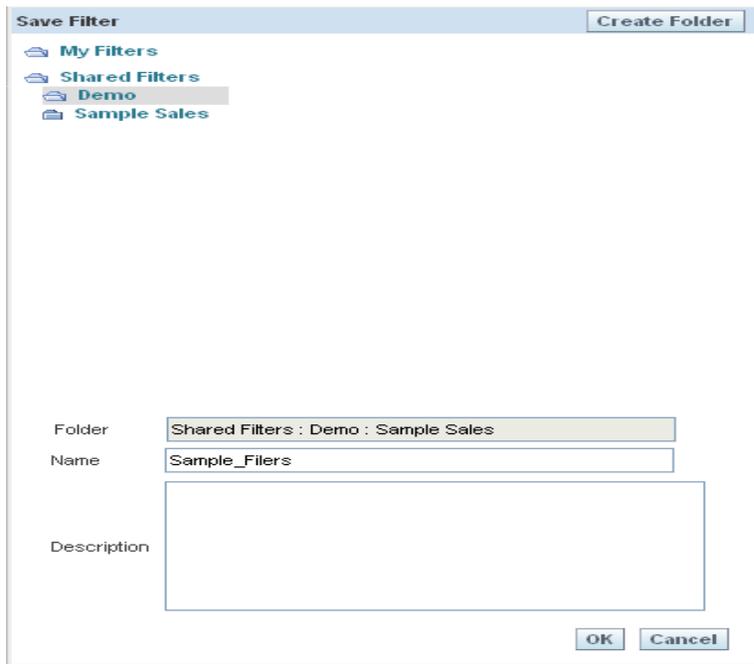
2 In the selection pane, navigate to the appropriate Filters folder and click the saved filter that you want to apply.

The Apply Saved Filter dialog box appears.

3 Specify your choices, if any, in the Filter Options area.

4 Click OK.

The filter appears in the Filters area on the Criteria tab.



The screenshot shows the 'Save Filter' dialog box. The title bar includes a 'Create Folder' button. The left pane shows a folder tree with 'My Filters', 'Shared Filters', 'Demo', and 'Sample Sales'. The right pane is empty. Below the tree, the 'Folder' field contains 'Shared Filters : Demo : Sample Sales', the 'Name' field contains 'Sample\_Filters', and the 'Description' field is empty. At the bottom right are 'OK' and 'Cancel' buttons.

**ORACLE Answers**

Sample Sales

Columns

- Dimensions
- D0 Time
- D1 Customer
- D2 Market
- D3 Order
- D4 Product
- D5 Employee
- Facts
- F1 Revenue
- F2 Units
- F3 Bookings
- F4 Inventory

Filters

- Demo
  - Sample\_Filters
  - Sample Sales

Criteria Results Prompts Advanced

**Columns**

Click on column names in the selection pane to add them to the request. Once added, drag-and-drop columns to

D4 Product	D2 Market	D01 More Time Objects	F1 Revenue	D0 Time
P01 Product	M01 Market	T15 Day Of Year	1-01 Revenue (Sum All)	T00 Calendar Date

Display Results Remove All

**Filters**

Add filters to the request criteria by holding down the CTRL key and clicking on column names in the selection pane.

Combine with Similar Request

## Editing a Column Filter in Oracle BI Answers

If your user ID has the appropriate permissions, you can edit a column filter to change its properties.

## Removing a Column Filter in Oracle BI Answers

You can remove a single filter or all filters from an Oracle BI request.

**Apply Saved Filter**

**Filter Location and Contents**

Filter Location

Shared Folders : Demo : Filters : Sample Sales : **Sample\_Filters**

Contents of Filter

P01 Product is equal to / is in **Product 01**

**Filter Options**

Choose one or more of the following options to control how the filter should be applied to the request.

Clear all existing filters before applying

Apply contents of filter instead of a reference to the filter

OK Cancel

## Editing a Column Filter in Oracle BI Answers

If your user ID has the appropriate permissions, you can edit a column filter to change its properties.

To edit a column filter in Oracle BI Answers

1 In the Filters area on the Criteria tab in Oracle BI Answers, click the menu button for the filter you want to edit and choose Edit Filter.

The Create/Edit Filter dialog box appears.

NOTE: The Edit Filter option is available only if you have permission to edit the filter.

2 Make your changes, and then click OK.

D4 Product	D2 Market	D01 More Time Objects	F1 Revenue	D0 Time
P01 Product ↓↑	M01 Market ↓↑	T15 Day Of Year ↓↑	1-01 Revenue (Sum All) ↓↑	T00 Calendar Date ↓↑

## Filters

Add filters to the request criteria by holding down the CTRL key and clicking on column names in the selection name in the selection pane. ?

P01 Product is equal to / is in Product 01

- Edit Filter...
- Cut Filter
- Copy Filter
- Edit Column Formula...
- Protect Filter

## Editing the Formula for a Column Filter in Oracle BI Answers

If your user ID has the appropriate permissions, you can edit the formula for a column filter.

To edit the column formula for a filter in Oracle BI Answers

1 In the Filters area on the Criteria tab in Oracle BI Answers, click the menu button for the filter

whose formula you want to edit and choose the following option:

Edit Column Formula

2 At the Column Formula tab, type the formula into the Column Formula area.

For more information, click the help button.

D4 Product	D2 Market	D01 More Time Objects	F1 Revenue	D0 Time
P01 Product ↓↑	M01 Market ↓↑	T15 Day Of Year ↓↑	1-01 Revenue (Sum All) ↓↑	T00 Calendar Date ↓↑
   	   	   	   	   

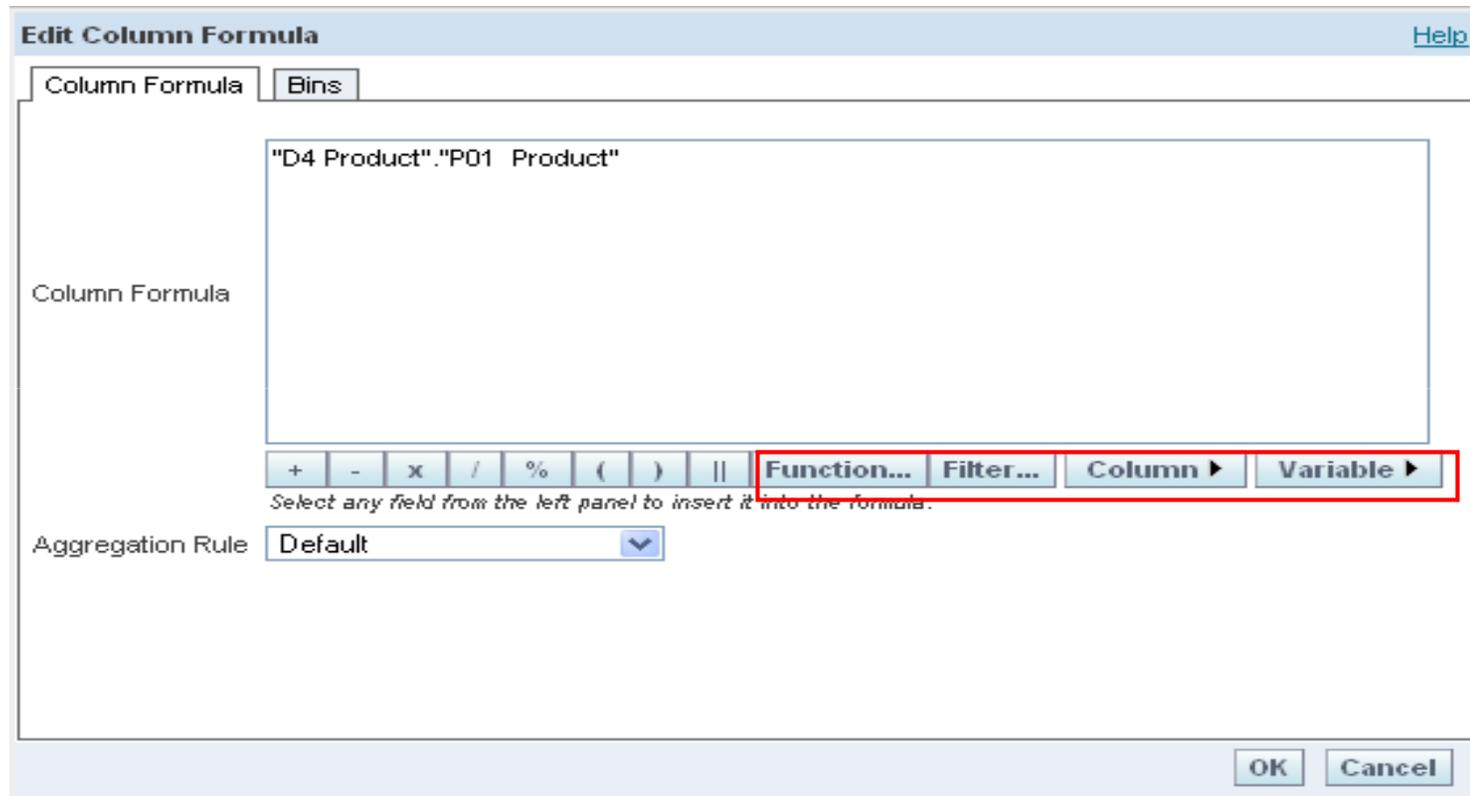
## Filters

Add filters to the request criteria by holding down the CTRL key and clicking on column names in the selection name in the selection pane. 

P01 Product is equal to / is in Product 01  

- Edit Filter...
- Cut Filter
- Copy Filter
- Edit Column Formula...**
- Protect Filter

## Editing the Formula for a Column Filter in Oracle BI Answers



## To combine a column filter with other column filters in Oracle BI Answers

1 At the Criteria tab in Oracle BI Answers, add at least two column filters to a request, or add at least two column filters to a saved filter.

The filters are listed in the Filters area with an AND operator between them.

2 To change an AND operator to an OR operator, click it.

3 As you add column filters, click AND and OR operators to group filters and construct the desired filter combinations. Combined filters elements are bounded by boxes.

4 To cut, copy, or ungroup bounded elements, click the ellipses button [ . . . ] and choose the appropriate option.

The screenshot shows the Oracle BI Answers interface with the 'Criteria' tab selected. The 'Columns' section displays a table of selected columns:

D0 Time	D4 Product	D2 Market	F1 Revenue
T05 Per Name Year	P01 Product	M01 Market	1-01 Revenue (Sum All)

Below the columns are buttons for 'Display Results' and 'Remove All'. The 'Filters' section is highlighted with a red box and contains the following filter definitions:

- M01 Market is equal to / is in **Market 1**
- OR** P01 Product is equal to / is in **Product 01**
- AND** T05 Per Name Year is equal to / is in **2006**

Buttons for 'Save Filter...', 'Remove Filters', and 'Edit Filter Group' are also visible.

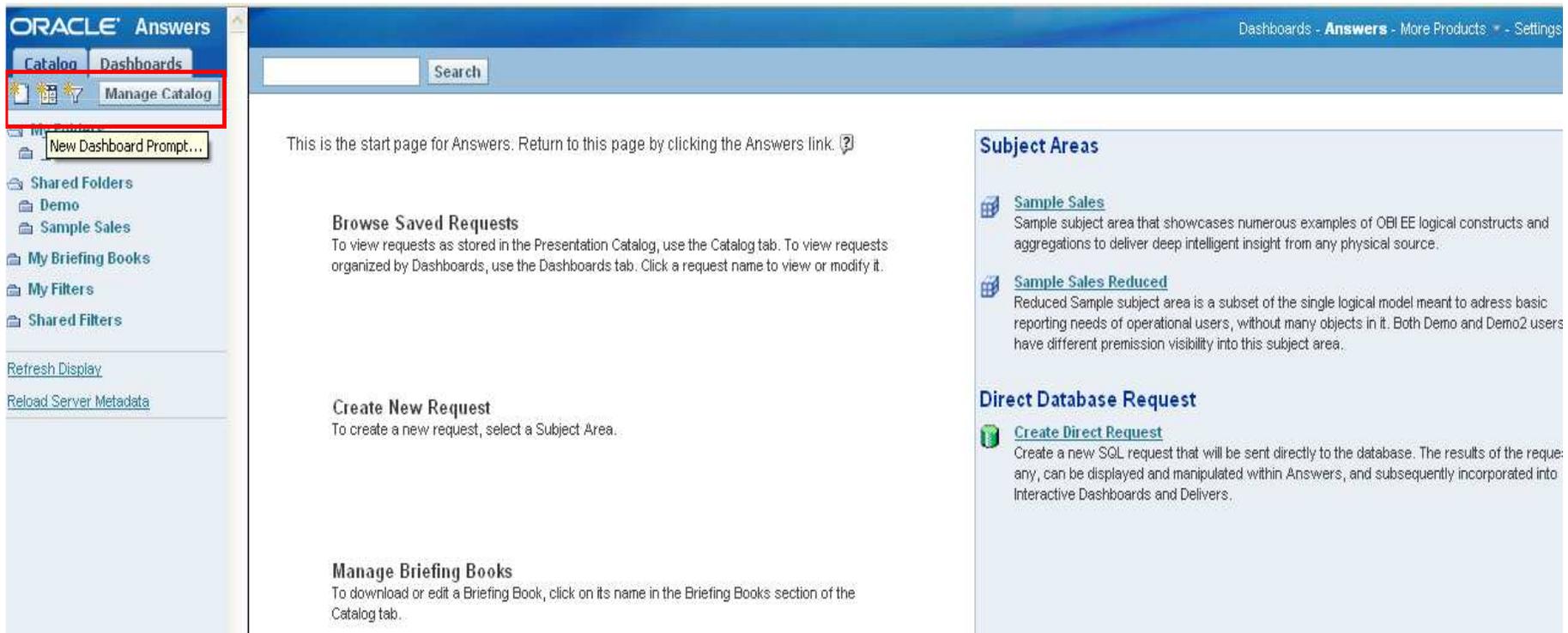
## Using Prompts to Simplify Filtering in an Oracle BI Request

To simplify filtering, Oracle BI Answers provides two types of prompts,

1 Dashboard prompts

2.Criteria prompts:

A dashboard prompt is a special kind of filter that filters requests embedded in a dashboard. A dashboard prompt filters embedded requests that contain the same columns as the filter. It can filter all embedded requests in a dashboard, or embedded requests on the same dashboard page.



The screenshot displays the Oracle BI Answers web interface. The top navigation bar includes 'Catalog' and 'Dashboards' tabs, with 'Manage Catalog' highlighted in a red box. The main content area features a search bar and several sections: 'Browse Saved Requests', 'Create New Request', 'Manage Briefing Books', 'Subject Areas', and 'Direct Database Request'. The 'Subject Areas' section lists 'Sample Sales' and 'Sample Sales Reduced', while 'Direct Database Request' includes a 'Create Direct Request' link.

A criteria prompt guides users in making selections for individual requests. There are two kinds of criteria prompts, column filter prompts and image prompts:

- A **column filter** prompt provides general filtering of a column within a request. A column filter prompt can present all choices for a column, or, like a dashboard prompt, it can present constrained choices for a column. For example, if a request contains a Region=East filter, constraining choices for the City column restricts the selections to cities in the East region only. This eliminates the selection of a mutually exclusive filter that could result in no data.

- An **image prompt** provides an image that users click to select criteria for a request. For example, in a sales organization, users can click their territories from an image of a map to see sales information, or click a product image to see sales information about that product. Users who know how to use the HTML <map> tag can create an image map definition.



## Add or modify a column filter prompt in Oracle BI Answers

1 At the Criteria tab in Oracle BI Answers, modify a request to which you want to add a column filter prompt, and then click the Prompts tab.

2 From the Create Prompt drop-down list, select Column Filter Prompt. The Column Filter Prompt Properties dialog box appears.

**Criteria** | **Results** | **Prompts** | **Advanced**

**Columns**  
Click on column names in the selection pane to add 1  
?

D0 Time	F1 Revenue
T05 Per Name Year ↓↑	1-01 Revenue (Sum All) ↓↑

**Display Results** **Remove All**

**Filters**  
Add filters to the request criteria by holding down the  
name in the selection pane. ?

**Combine with Similar Request**

3 Type a caption for the column filter prompt in the Caption box.

The caption will appear to the user. You can include HTML markup tags in the caption, such as <b>, <font>, and <table>.

4 Type a description in the Description box. Descriptions are displayed when Oracle BI administrators use the Catalog Manager.

5 From the Filter on Column drop-down list, select the column in the request that you want to filter, and then, from the Operator drop-down list, select the operator to use.

If you want the user to select the operator, select the operator \*Prompt User.

6 Specify how the user should choose values by clicking the appropriate option.

Users can select values from a drop-down list, or browse through choices and type them into a text box.

7 To allow the user to choose only one value for the column filter prompt, click the check box labeled Single Value Only.

**Column Filter Prompt Properties**

Caption

Description

Filter on Column

Operator

**How should the user choose a value or values?**

Select it from a drop-down list

Browse through choices and/or type in directly

Single Value Only

**What values should be shown to the user?**

None

All Values

Limited Values

SQL Results

(The values returned by this SQL statement)

**Other options**

Choices per page

(leave blank for automatic setting)

Allow user to constrain choices

Allow user to skip prompt

OK Cancel



8 Select the values that should be shown to the user by clicking the appropriate option:

- To show no values, click None.

The user will need to type the value.

- To show all possible values, click All Values.

- To show a subset of values, click Limited Values.

Limiting values is useful when prompting for multiple columns, or when the results already contain a filter. It prevents a user from choosing values that would result in no data. For example, suppose a request contains a country column and a city column, and already contains the filter Country=France. By selecting limited values for the city column filter, the choices are constrained to cities in France only, which prevents the possibility of choosing mutually exclusive filters, such as Country=Italy and City=Paris.

- To limit the values to the results of an SQL statement, click the option SQL Results and type the SQL statement into the text box.



9 Make selections for the options in the Other Options area:

- To explicitly limit the number of choices a user sees per page, type the number in the Choices per page box.

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- To allow the user to constrain the filter choices, click the check box next to the following option:

Allow user to constrain choices

Constrained choices help the user locate the values to use as a filter. For example, if a filter contains all the cities in France, a user can constrain the filter choices to those cities starting with P.

- To allow a user to skip this column filter, click the check box next to the following option:

Allow user to skip prompt

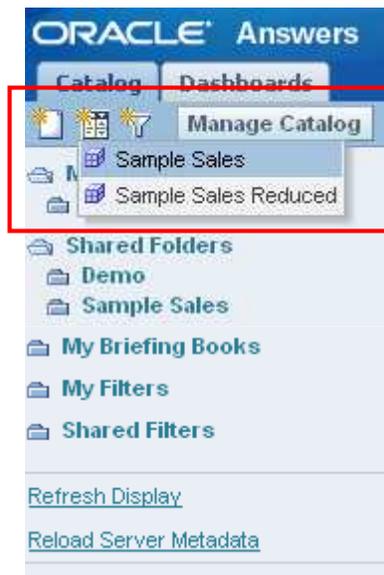
This causes a Skip Prompt option to appear. The user can then click this option to bypass making a selection for this filter.

10 When you are finished, click OK.

The column filter prompt is shown on the Prompts tab.

## Creating a Dashboard Prompt for Filtering Oracle BI Requests

A dashboard prompt filters the results of embedded requests to show only results that match the prompt criteria. A dashboard prompt can filter all requests embedded in a dashboard or requests on certain dashboard pages only.



### Dashboard Prompt

Prompts for values which filter results o

Scope:

### Prompts

Click on columns in the selection pane presentation.

### Prompts

Click on columns in the selection pane to add them to the Dashboard Prompt. On a Dashboard, multiple column prompts will be shown on one line. Checking the "Group" opt presentation.

Group	Column	Operator	Control	Show	Default to	Set Variable	Label
	T05 Per Name Year	<input type="text" value="is equal to / is in"/>	<input type="text" value="Drop-down List"/>	<input type="text" value="All Values"/>	<input type="text" value="Report Defaults"/>	<input type="text" value="None"/>	<input type="text" value=""/>
				<input checked="" type="checkbox"/> (All Choices)			
				<input type="checkbox"/> Constrain			

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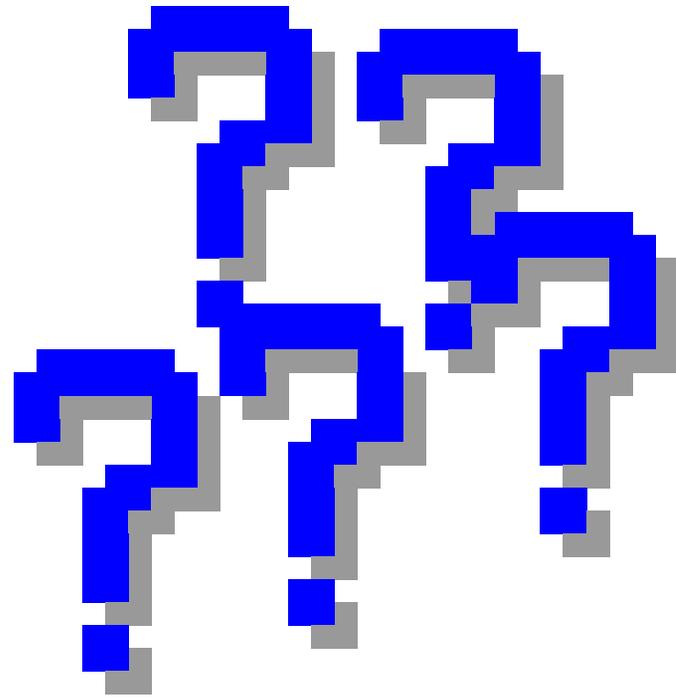
## Editing the SQL for a Column Filter in an Oracle BI Request

You can edit the logical SQL WHERE clause to be used as a filter. While generally not necessary, this feature is available for users who need advanced filtering capability. For a comprehensive description of SQL syntax, refer to a third-party reference book on SQL, to a reference manual on SQL from one of the database vendors, or to an online reference site.

### Example 1: Identifying Customers with the Most Sales Volume

The following example request reports data on the ten customers with the most sales volume in 2003.

```
SELECT Customers.Customer, Periods.Year,  
SalesFacts.Dollars, RANK(SalesFacts.Dollars),  
Sales_YAgo.DollarsPctChgVsYago,  
RANK(Sales_YAgo.DollarsYago)  
FROM "SupplierSales"  
WHERE Periods.Year = 2003  
AND RANK(SalesFacts.Dollars) <= 10 ORDER BY 4
```



# Questions

mailto : [aloo\\_a2@yahoo.com](mailto:aloo_a2@yahoo.com) for all Hyperion video tutorial/Training/Certification/Material