

**Supported Version:** Oracle BAM 10.1.3

**Objectives:**

This document describes to designing report filters. Filters help in limiting the sub-set of data being fetched from the BAM ADC repository, and displaying the business information of “required” interest. It can also be used to define certain KPIs (Key Performance Indicators) or SLA (service level agreements) and display content matching (or not matching) these criteria. Setting the report filter property for selectively displaying any satisfying criteria and provides a powerful user representation of the data set. Filters are also used to define mapping condition between report navigation, for content sensitive driving of information, drill across report and more.

Various business terminologies are designed /represented inside the BAM system as “filters”, such as SLAs, KPIs, business conditions, cross report navigation, context sensitive driving, user selection fields etc.

**Prerequisite:**

You should have completed all the steps described to previous tutorial documents. This document uses the BPEL OrderBooking Tutorial for example and building business dashboards.

**Designing filters in the reports**

This exercise uses the reports built earlier in document for “simple reports”. And expands the simple reports to show further business information, provide more navigation features, designing driving views, etc.

**Designing reports for displaying filtered values**

**Filtered Report #1:**

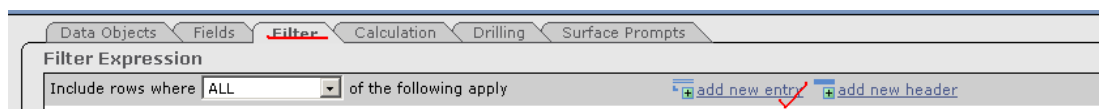
Open the “Orders By Status” report in Active Studio for editing.

Click on “Edit” under the Actions tree.

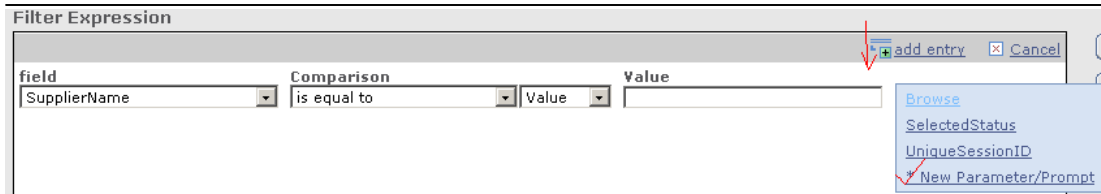
Click on “Edit View”. This will open the view for editing.

We will now set the filter criteria to show only a subset of data instead of all data. These filter criteria can be selected by the user from the UI or the values can also be sent from other reports via navigation tool.

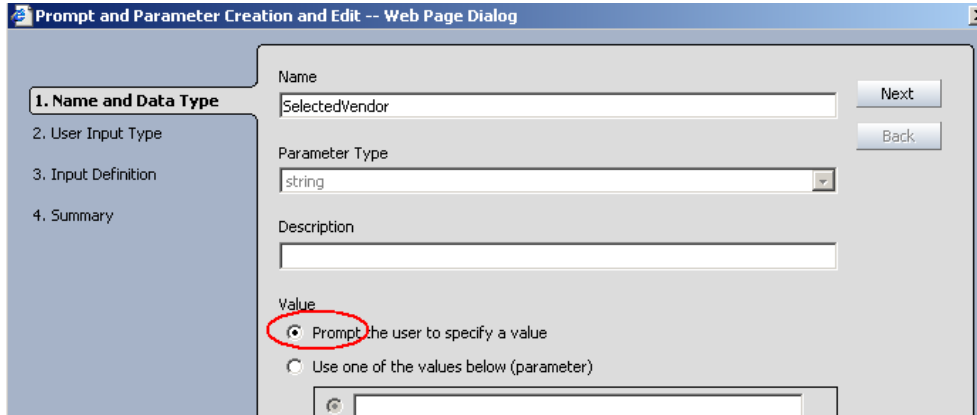
Select the “Filter” Tab. Click on “add new entry” – Select “SupplierName” field, and set comparison to “is equal to - Value”. Click on the “option” button and select “New Parameter/prompt”.



## Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports (Tutorial\_8\_BAM\_DesigningReportFilters.doc)



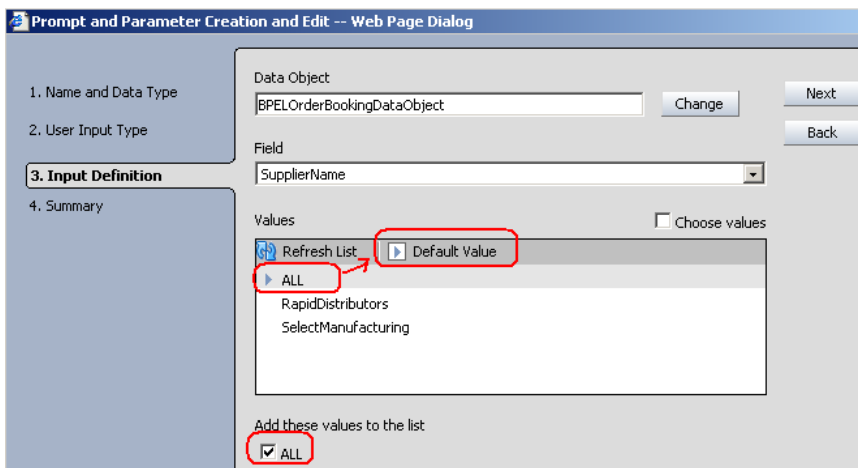
This will bring up the “Prompt and Parameter Creation” Window.  
In the *Name and Data Type* screen, set name as “SelectedVendor”  
For the “Value” entry, select “Prompt the user to specify a value”.  
Click “next”.



In the next screen (*User Input Type*), select “choose from the list of field values” and click “next”.

In next screen (*Input Definition*), click “BPELOrderBookingDataObject”. Select the Field value “SupplierName”.

Select the “All” check box, (the ALL string appears in Values box).  
Now select “ALL” and set it as default value. (a little arrow head appears next to ALL).



## Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports (Tutorial\_8\_BAM\_DesigningReportFilters.doc)

---

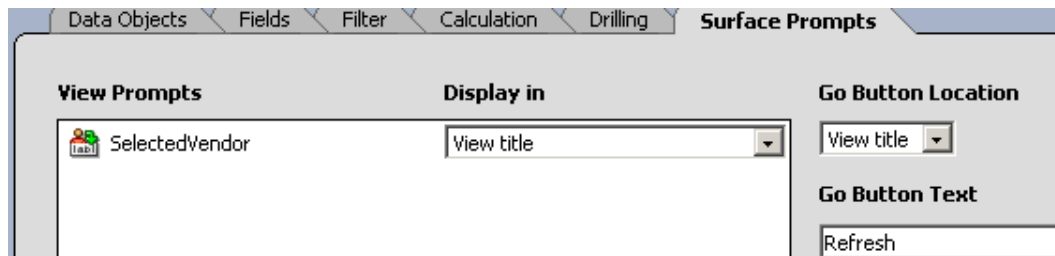
Click on Next.

We have now defined 2 steps –

- (a) To present user with choice to pick based on the unique values in the given data object/ given field
- (b) If no users input is given, then select –All combinations).

Click on “OK” to close this window panel, Click on “Add Entry” to add the filter condition to the report. Click on “Apply” to complete the definition of filters.  
Click OK.

Click on the “Surface Prompt” tab, and set the SelectedVendor prompt at View Title level.



This completes the view filter, and the graph is all set to display selected fields only. This report can accept variables set to “SelectedVendor” from another report.

Note- this graph displays “OrderStatus”, and now can be selected based on “Supplier Name”.

Click on the “Save” icon to save the report. Click the “Close” link (in the *Actions* pane) and close this report.

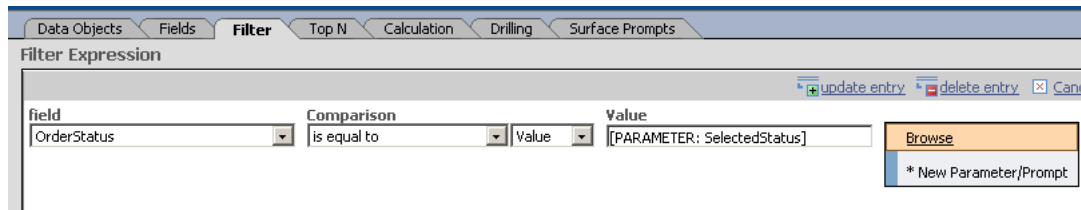
### Filtered Report #2:

Open the “Orders By Vendors” report in Active Studio for editing.  
Click on “Edit” under the Actions tree.  
Click on “Edit View”. This will open the view for editing.

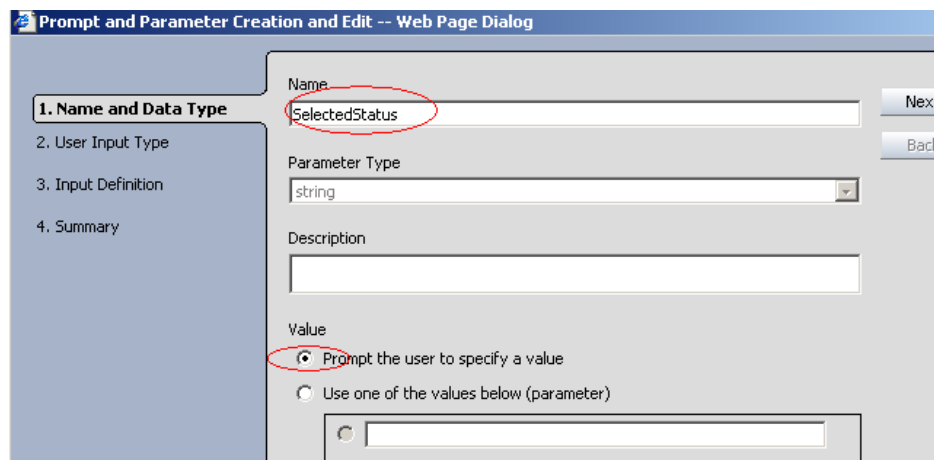
We will now set the filter criteria to show only a subset of data instead of all data based on OrderStatus. The filter criteria can be selected & values sent from other reports via navigation tool.

## Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports (Tutorial\_8\_BAM\_DesigningReportFilters.doc)

Select the “Filter” Tab. Click on “add new entry”. Select “OrderStatus” field, and set comparison to “is equal to - value”. Click the “options” button and select “New Parameter/Prompt”



In the new parameter prompt window, set name as “SelectedStatus”, Select the Value as “Prompt the user to specify a value”, click “next”.



In the next window, select “choose from the list of fields” and click “next”.

In next window panel, click “BPELOrderBookingDataObject”, Field = ”OrderStatus”.

Select “All” check box, (the string “ALL” appears in values box). Select “ALL” and set it as default value. (a little arrow head appears next to All).

We have now defined 2 steps –

- (a) To present user with choice to pick based on the unique values in the given data object/ given field
- (b) If no users input is given, then select –All combinations).

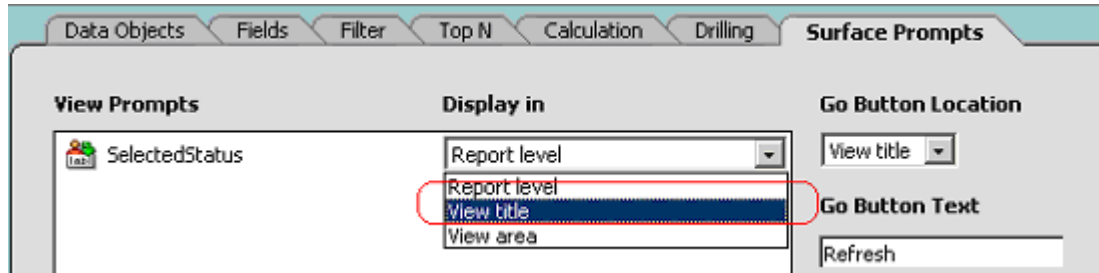
Click on Next. Click “OK” to close this window panel.

In the filter window panel, click “Add Entry” and “Apply” to complete the definition of filters. Click on OK.

## Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports (Tutorial\_8\_BAM\_DesigningReportFilters.doc)

This completes the view filter, and the graph is all set to display selected fields only.

Click on the “Surface Prompts” tab, and set the SelectedStatus prompt at View Title level.



Click on Apply and OK.

Click the Save icon to save the report.

This graph now displays “Orders By Vendors”, and now can be selected based on “OrderStatus”. By default – it displays all the orders for all the vendors, with this selection – is now possible to display only vendors with a particular order status. This will be verified during execution steps later.

### Filtered Report #3:

Open the “Orders By Values” report in Active Studio for editing.

Click on “Edit” under the Actions tree.

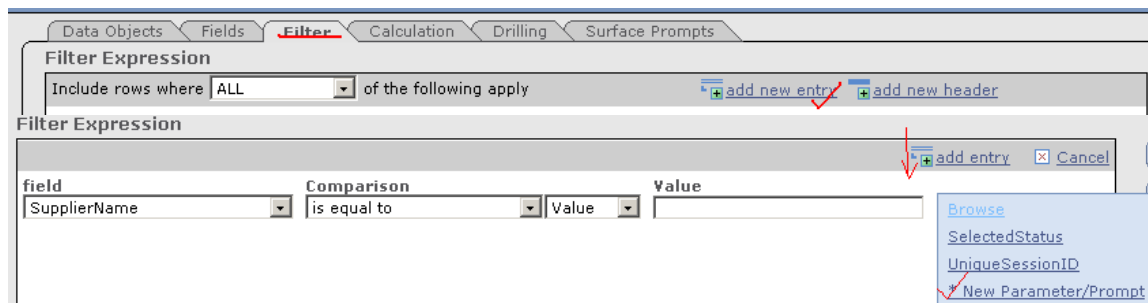
Click on “Edit View”. This will open the view for editing.

We will now set the filter criteria to show only a subset of data instead of all data based on OrderStatus “AND” VendorName.

Select the Filter Tab.

Click on “add new entry” – Select “SupplierName” field, and set comparison to “is equal to - value”.

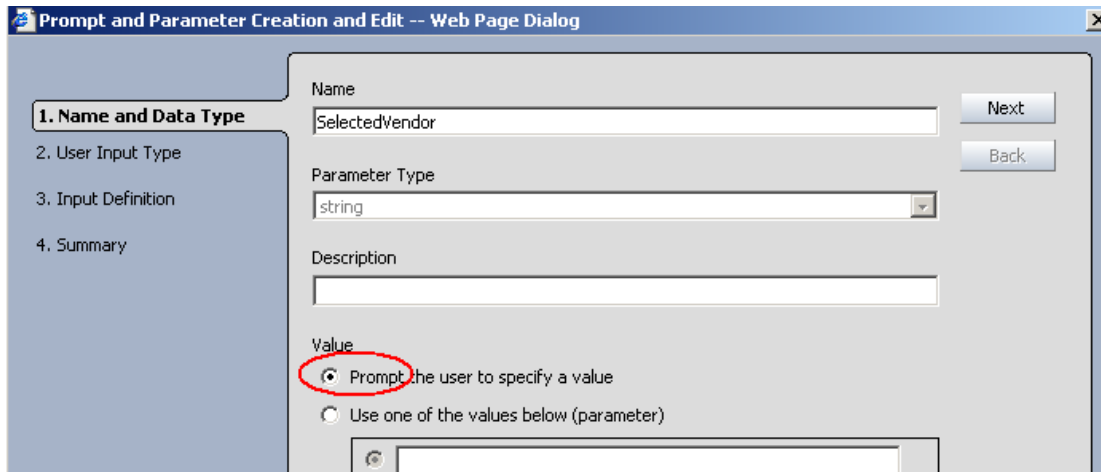
Click the “options” button and select “New Parameter/prompt”.



## Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports (Tutorial\_8\_BAM\_DesigningReportFilters.doc)

---

In the new parameter prompt window, set name as “SelectedVendor”, and Value as “Prompt the user to specify a value”



Click “next”.

In the User Input Type window, select “choose from the list of field values”. Click “Next”.

In the Input Definitions window panel, click “BPELOrderBookingDataObject”, Field = ”SupplierName”.

Select “All” check box, (the All string appears in Values box).  
Select “all” and set it as default value. (a little arrow head appears next to All).

## Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports (Tutorial\_8\_BAM\_DesigningReportFilters.doc)

Prompt and Parameter Creation and Edit -- Web Page Dialog

1. Name and Data Type  
2. User Input Type  
**3. Input Definition**  
4. Summary

Data Object: BPELOrderBookingDataObject [Change] [Next]  
Field: SupplierName [Back]

Values: ☐ Choose values

Refresh List [▶] Default Value

▶ ALL  
RapidDistributors  
SelectManufacturing

Add these values to the list  
☒ ALL

Click on Next.

We have now defined 2 steps:

- (a) To present user with choice to pick based on the unique values in the given data object/ given field
- (b) If no users input is given, then select –All combinations).

Click on “OK” to close this window panel.

Click on “Add Entry” to add the filter condition to the report. Click on “Apply” to complete the definition of filters. Click OK.

Click on the “Surface Prompt” tab, and set the SelectedVendor prompt at View Title level.

Data Objects Fields Filter Calculation Drilling **Surface Prompts**

**View Prompts** **Display in** **Go Button Location**

SelectedVendor [tab] View title View title

**Go Button Text**

Refresh

Click OK.

Click the Save icon to save the report.

## **Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports**

(Tutorial\_8\_BAM\_DesigningReportFilters.doc)

---

This completes the view filter, and the graph is all set to display selected fields only. This report can accept variables set to “SelectedVendor” from another report.

Similarly set another “add new entry” – to select “OrderStatus” (name= SelectedStatus) based on BPELOrderBookingDataObject, field OrdersStatus. (default selection= all).

Click the Save icon to save the report.

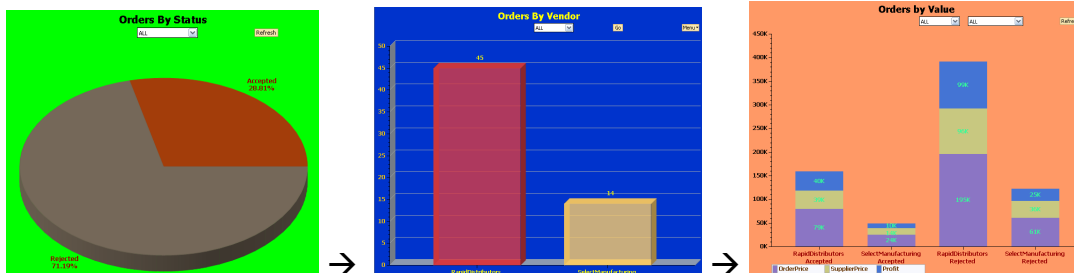
This completes defining the filter condition for this graph (two filters in AND mode). By default this graph would display all the values for “all” the OrderStatus & “all” the SupplierNames. But, if a parameter would be passed to this report, it will display the graph selectively to satisfy the condition selected (OrderStatus or SupplierName or both).



## Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports (Tutorial\_8\_BAM\_DesigningReportFilters.doc)

### Running Reports and Verification

Open Active Viewer window, and click on “Select Report”, select the individual reports (Orders By Status, Order By Vendors, Orders By Values) and verify that all the three reports as displayed as below, with complete “unconditional” data.

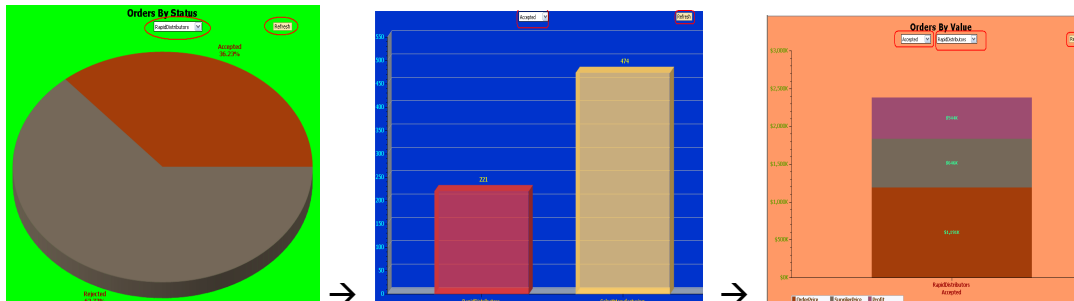


### Viewing reports with filters.

Open Active Viewer window, and click on “Select Report”, select the individual reports (Orders By Status, Order By Vendors, Orders By Value).

On each of the individual reports, select the filter from the drop down list. Observe that the filter provides only valid selections to choose from.

Select a required filter and click on “go/refresh”. Observe and verify that all the three graphs are displayed with the appropriate filter criteria applied, and only a subset of the data object satisfying the condition is displayed.



### Saving your report:

Open the dos command prompt and use iCommand utility to save all your work.

```
cd c:\temp
```

```
iCommand cmd=EXPORT file=FilteredReport1.report name="StudentLab/Orders By Status"  
type=report
```

```
iCommand cmd=EXPORT file=FilteredReport2.report name="StudentLab/Orders By Vendors"  
type=report
```

## **Tutorial : Oracle BAM – Active Studio –Designing Filters on Reports** (Tutorial\_8\_BAM\_DesigningReportFilters.doc)

---

*iCommand cmd=EXPORT file= FilteredReport3.report name="StudentLab/Orders By Values"  
type=report*

You can later import this into the system, if required using import option.

### **Summary:**

At the end of this exercise, students would have understood:

- Designing filters into reports.
- Selecting the data object to filter and provide user control.
- Setting the report filter property for selectively displaying any satisfying criteria.

### **Questions & Clarifications:**

If you have any comments or need additional information, please communicate through the Oracle BAM forum at: <http://forums.oracle.com/forums/forum.jspa?forumID=252>