



This guide describes how to work with filters and prompts, use agents to delivery content, and create and use conditions.

For more detailed information about these and other tasks, see the [Oracle BI EE documentation](#) on Oracle Technology Network.



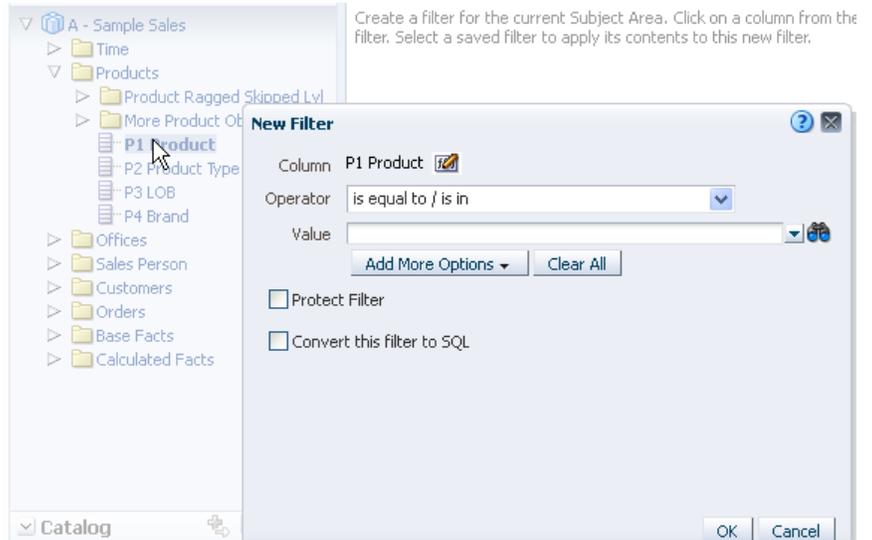
Working with Filters, Selection Steps, and Prompts

Creating Named Filters

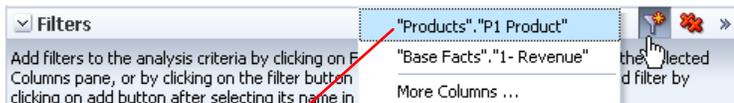
Filters limit the results that are displayed when an analysis is run so that the results answer a particular question.

To create a named filter (a filter that you define and save by name in the catalog so that you can reuse it):

1. In the global header, click **New**, then select **Filter**.
2. Select a subject area. The Filter editor is displayed.
3. In the Subject Areas pane, double-click the column for which you want to create a filter. The New Filter dialog is displayed.
4. Specify the filter criteria.
5. Click **OK**.
6. Click **Save Filter**.



Creating Inline Filters



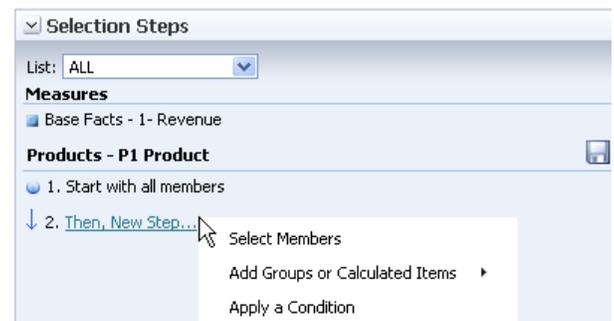
To create an inline filter (a filter that you define at the point of use and do not save by name in the catalog):

1. Edit the analysis for which you want to create a filter.
2. In the Filters pane, click the **Create a filter for the current Subject Area** button and select a column. The New Filter dialog is displayed.
3. Specify the filter criteria.
4. Click **OK**.
5. Save the analysis.

Creating Selection Steps

Selection steps also limit the results that are displayed when an analysis is run, so that the results answer a particular question.

1. Edit the analysis in which you want to create selection steps and click the Analysis editor: Results tab.
2. Click the **Show/Hide Selection Steps pane** button on the toolbar, if necessary, to show the Selection Steps pane.
3. For the column whose steps you want to define, click the **Then, New Step** link.
4. From the menu, select the option for the step type to create and complete the resulting dialog.



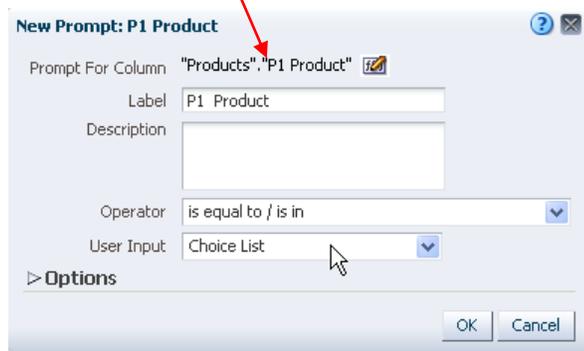
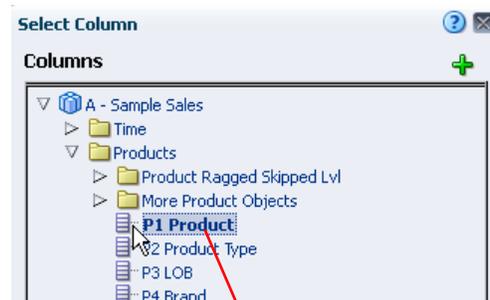
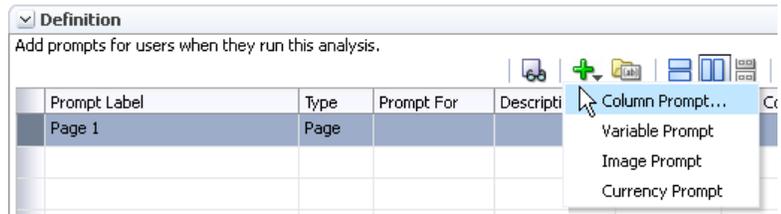
Creating Column Prompts

Prompts are another kind of filter that allow you to choose specific data values to include in the results. The results can be for an individual analysis or for multiple analyses included on a dashboard or dashboard page.



Creating Column Prompts for a Dashboard

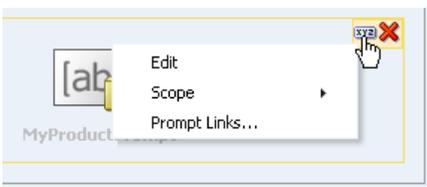
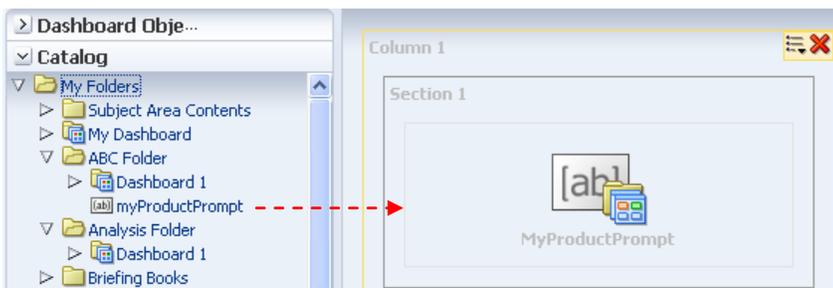
1. In the global header, click **New**, then select **Dashboard Prompt**.
2. Select a subject area. The Prompt editor is displayed.
3. Click the **New** toolbar button in the Definition pane and select **Column Prompt**. The Select Column dialog is displayed.
4. Select a column and click **OK**. The New Prompt dialog is displayed.
5. Specify the prompt criteria.
6. Click **OK**.
7. Click **Save Prompt** in the Prompt editor.



Creating Column Prompts for an Analysis

1. Edit the analysis for which you want to create a column prompt.
2. Click the Analysis editor: Prompts tab. The Prompt editor is displayed.
3. Click the **New** toolbar button in the Definition pane, select **Column Prompt**, and select a column from the cascading menu. The Select Column dialog is displayed.
4. Select a column and click **OK**. The New Prompt dialog is displayed.
5. Specify the prompt criteria.
6. Click **OK**.
7. Save the analysis.

Adding a Dashboard Prompt to a Dashboard



1. Open the dashboard to which you want to add a dashboard prompt.
2. Click the **Page Options** button, then select **Edit Dashboard**. The Dashboard builder is displayed.
3. In the Dashboard builder's Catalog pane, locate the dashboard prompt and drag and drop it to a section in the dashboard.
4. Set the properties of the dashboard prompt.

To set a property, hover the mouse pointer over the dashboard prompt in the Page Layout area, click the **Properties** button, then select the property.

For example, click **Properties**, select **Scope**, then select one of the following options.

- **Dashboard** to specify that the prompt applies to the entire dashboard.
- **Page** to specify that the prompt applies to the dashboard page.

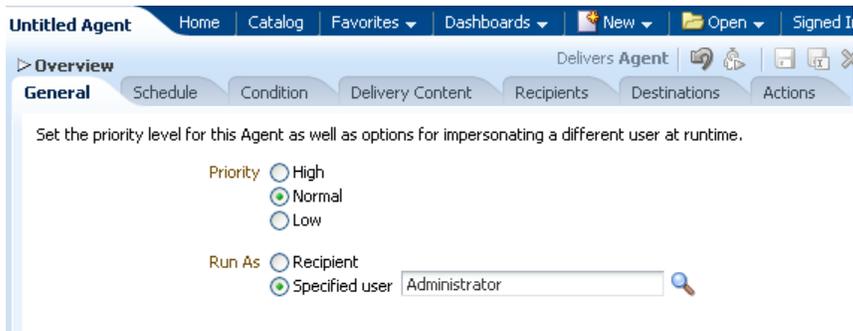
5. Save the dashboard.

Using Agents to Deliver Content

Creating Agents

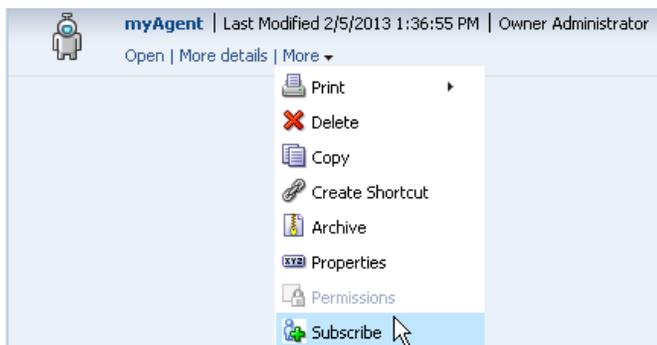
In the global header, click **New**, then select **Agent**. The Agent editor is displayed.

1. Click the General tab and specify the priority of the content that the agent is to deliver and how to generate the delivery content.
2. Click the Schedule tab and specify when the agent is to run.
3. Click the Condition tab and specify whether the agent always or conditionally delivers its content and executes its actions.
4. Click the Delivery Content tab and specify the content to deliver with the agent, such as a dashboard page or a saved analysis.
5. Click the Recipients tab and specify who is to receive the delivery content of the agent and who is allowed to subscribe to the agent.
6. Click the Destinations tab and specify where the content is to be delivered.
7. Click the Actions tab and specify one or more actions to execute when the agent finishes.
8. Save the agent.



Note: After you have saved the agent, you can run the agent by clicking the **Run Agent Now** toolbar button .

Subscribing to Agents

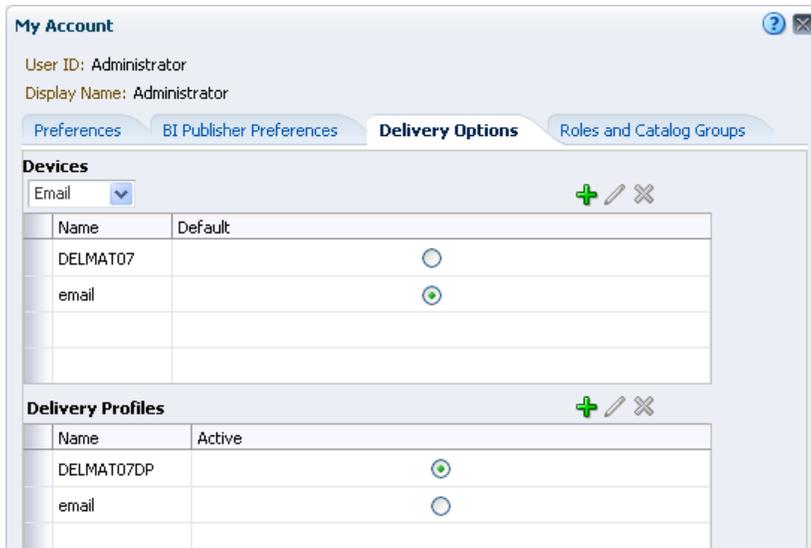


1. In the global header, click **Catalog** and navigate to the agent to which you want to subscribe.
2. Click the **More** link for the agent and select **Subscribe**.

Configuring Devices and Delivery Profiles

To configure the devices and delivery profiles to be used to reach you when an alert is generated by an agent:

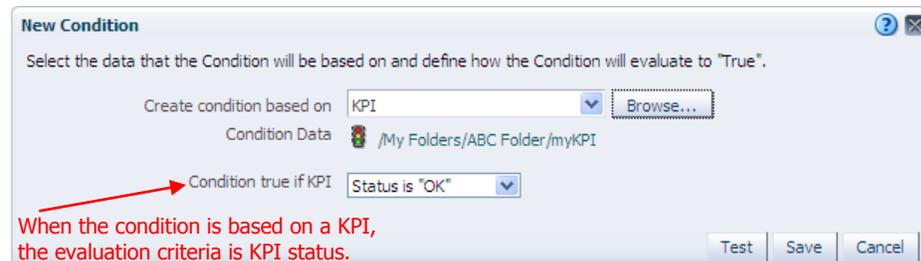
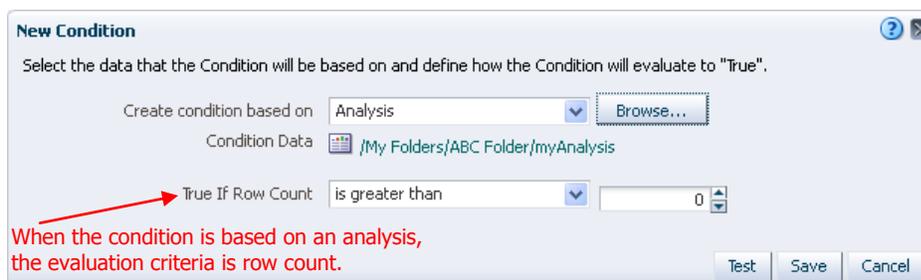
1. In the global header, click **Signed In As *username*** and select **My Account**. The My Account dialog is displayed.
2. Click the Delivery Options tab and specify your devices and delivery profiles.
3. Click **OK** to save your settings.



Creating and Using Conditions

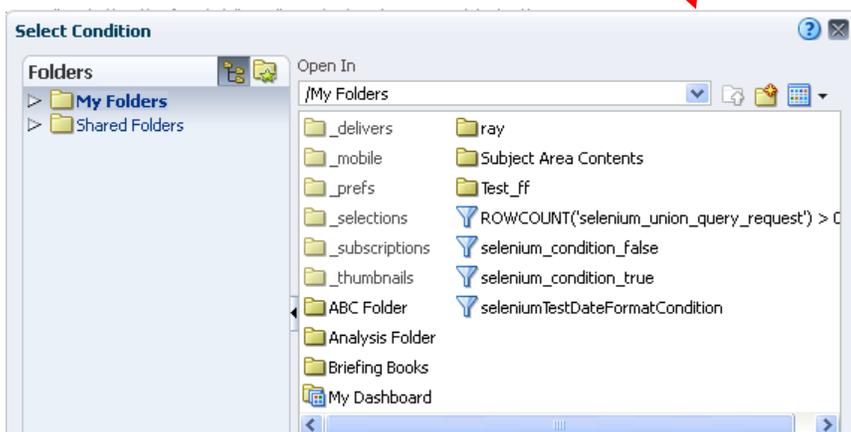
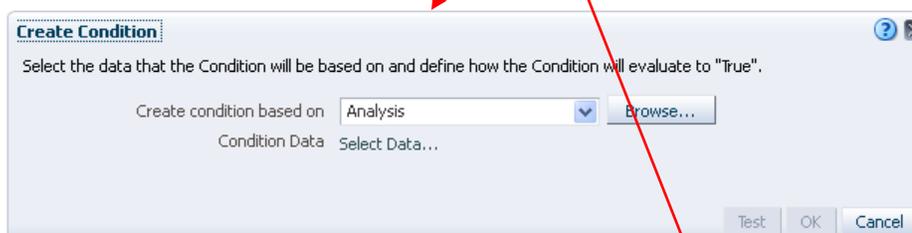
Creating Named Conditions

1. In the global header, click **New**, then select **Condition**. The New Condition dialog is displayed.
2. In the **Create condition based on** box, select whether the condition is to be based on an **Analysis** or **KPI**.
3. Edit any prompted filters (optional) or specify the values for any KPI dimensions.
4. Specify the evaluation criteria:
 - For an analysis, in the **Operator** box, specify the operator to apply to the row count. Then, in the **Row Count** box or boxes, specify the row count to be evaluated.
 - For a KPI in the **Condition true if KPI** box, select the KPI status.
5. If you want to test the condition, click **Test**.
6. Click **Save** to save the condition by name to the catalog.



Note: You can use named conditions with agents and dashboard pages. The following procedure explains how to use a condition (either named or inline) to determine whether an agent delivers its content or executes its actions.

Using Conditions to Determine Whether Agents Deliver Content or Execute Actions



1. Edit the agent.
2. Click the Agent editor: Condition tab.
3. Select the **Use a condition** box.
4. If you want to:
 - Create an inline condition, then click **Create** to display the Create Condition dialog and complete the dialog.
 - Select a named condition, then click **Browse** to display the Select Condition dialog and complete the dialog.
5. Save the agent.